

AGENDA
CITY OF MONONA
COMMUNITY DEVELOPMENT AUTHORITY
Monona City Hall – Conference Room
5211 Schluter Road, Monona, WI
Tuesday July 28, 2020
6:30 pm

NOTICE OF ELECTRONIC MEETING

Note: CDA Members will meet remotely via Zoom virtual meeting. Additional details below.

1. Call to Order
2. Roll Call
3. Approval of CDA Meeting Minutes of June 23, 2020.
4. Appearances
5. Old Business (None)
6. New Business
 - A. Consideration and possible action on 5209 McKenna Road Renew Monona Loan Program Request – Alfronso Robledo and Beth Cook.
 - B. Consideration and possible action on Renew Monona Loan Program policies.
 - C. Consideration and possible action on rescheduling a Public Hearing date for TID Boundary and Allocation Amendments [Reschedule to August 25, 2020]
7. Update on Existing and Proposed Developments
 - A. Staff Report on Development Projects and Applications.
 - B. CDA Questions and Requests for Information Concerning Development Projects.
8. Upcoming CDA Meetings – August 25, 2020
9. Adjournment

ELECTRONIC MEETING INFORMATION NOTICE

Due to the current state of emergency because of the COVID-19 pandemic, this meeting will be conducted via electronic videoconferencing/teleconferencing. As such, it is likely that some or all members of, and a possible quorum, may be in attendance via electronic means and not physically present. In accordance with Wisconsin law, the meeting will remain open to the public. The public may still attend in person at the location stated in this agenda. However, due to the need to maintain social distancing in accordance with Emergency Order #12 (Safer At Home Order) and the limited physical space available, the public is encouraged and requested to also attend via electronic means. Directions to do so are listed at the bottom of this agenda. Upon reasonable notice, the needs of disabled individuals will be accommodated through auxiliary aids or services. For additional information or to request this service, contact Joan Andrusz at 608-222-2525.

DIRECTIONS TO ATTEND MEETING ELECTRONICALLY

You may attend via videoconference at <https://us02web.zoom.us/j/81102724736> or by downloading the free Zoom program to your computer at <https://zoom.us/download>. At the date and time of the meeting log on through the Zoom program and enter Meeting ID: 811 0272 4736.

You may attend via telephone conference by calling the following phone number:

PHONE NUMBER: 1-312-626-6799 / MEETING ID: 811 0272 4736, FOLLOWED BY #

Please Mute Your Phone When Not Speaking To Ensure Best Possible Audio Quality.

Note: Upon reasonable notice, the City of Monona will accommodate the needs of disabled individuals through auxiliary aids or services. For additional information or to request this service, contact Joan Andrusz at (608) 222-2525 (not a TDD telephone number), FAX (608) 222-9225, or through the City Police Department TDD telephone number 441-0399. The public is notified that any final action taken at a previous meeting may be reconsidered pursuant to the City of Monona ordinances. A suspension of the rules may allow for final action to be taken on an item of New Business. It is possible that members of and a possible quorum of members of other governmental bodies of the municipality may be in attendance at the above stated meeting to gather information or speak about a subject, over which they have decision-making responsibility. Any governmental body at the above stated meeting will take no action other than the governmental body specifically referred to above in this notice.

Minutes - DRAFT
Community Development Authority
June 23, 2020

Chair Stolper called the Community Development Authority (CDA) meeting to order at 6:31 pm.

Present: Chair Tom Stolper, Alder Jennifer Kuhr, Mr. Andrew Homburg, Mr. Scott Kelly, Mr. Jeff Staver, and Alder Doug Wood.

Excused: None.

Also Present: City Administrator Bryan Gadow, City Attorney Bill Cole, City Planner Doug Plowman, Mayor Mary O' Connor, Gary Becker, and Scott Pauli.

MINUTES

A motion by Mr. Wood, seconded by Ms. Kuhr, to approve the minutes of the May 26, 2020 Closed Session meeting, and May 26, 2020 meeting carried.

APPEARANCES

There were no appearances.

OLD BUSINESS

There was no Old Business.

NEW BUSINESS

- A. Consideration and possible action on 6010 Ridgewood Avenue Renew Monona Loan Program Request – Scott Pauli and Jennifer Stofflet.

Mr. Pauli provided an overview of their Renew Monona Loan Program (RMLP) request, noting it would be for replacement of two large windows with three double hung windows to match the style.

Motion by Mr. Wood, second by Ms. Kuhr to approve the RMLP request of \$2,3970.50 for the stated project. Motion carried.

Mr. Wood asked staff to look into whether the median sale price eligibility criterion should be changed to median assessed value.

- B. Consideration and possible action on TID #5 Boundary Amendment.

Mr. Becker provided an overview of the amendment, and the subtraction of seven underperforming parcels.

Motion by Ms. Kuhr, second by Mr. Kelly, to authorize the Public Hearing for the TID #5 Boundary Amendment. Motion carried.

C. Consideration and possible action on TID #6 Allocation Amendment.

Mr. Becker provided an overview on the amendment, which would allow TID #6 to provide increment support to other districts.

Motion by Ms. Kuhr, second by Mr. Kelly, to authorize the Public Hearing for the TID #6 Allocation Amendment. Motion carried.

D. Consideration and possible action on TID #8 Allocation Amendment.

Mr. Becker provided an overview on the amendment, which would allow TID #8 to provide increment support to other districts.

Motion by Mr. Homburg, second by Ms. Kuhr, to authorize the Public Hearing for the TID #8 Allocation Amendment. Motion carried.

E. Consideration and possible action on establishing a Public Hearing date for TID Boundary and Allocation Amendments.

Motion by Ms. Kuhr, second by Mr. Wood, to establish a July 28, 2020 Public Hearing for the above referenced TID Boundary and Allocation Amendments. Motion carried.

REPORTS OF STAFF AND CDA MEMBERS

Administrator Gadow provided an update on recent Renew Monona Loan Program (RMLP) applications that will be reviewed at a forthcoming CDA meeting, the Yahara Commons Phase 3 project, and other development inquiries.

UPCOMING CDA MEETINGS

The next meeting will be Tuesday, July 28th at 6:30pm.

ADJOURNMENT

A motion was made by Mr. Wood, seconded by Mr. Kelly to adjourn. The motion carried. (7:01 pm)

**COMMUNITY DEVELOPMENT AUTHORITY
STAFF REPORT
CITY OF MONONA**

MEETING DATE: July 28, 2020

**AGENDA ITEM 6.A.
CASE NO. 2020-6**

Project: Request for Renew Monona Loan Funds
Project Address: 5209 McKenna Road
Applicant: Alfonso Valdez Robledo and Beth Crook

Proposal Summary:

Mr. Alfonso Robledo and Ms. Beth Crook (the "Applicant") own the property at 5209 McKenna Road (the "Property"), and has submitted a Renew Monona Loan application requesting \$75,000 - \$90,000 from the Home Improvement and Major Home Rehab categories (the "Application") to conduct the following improvements on the existing residence (the "Project"):

- Addition of a master bedroom and new master bathroom
- Removal of interior walls to open up the main living space
- Expansion of the basement including converting it to a walk out
- Plumbing updates
- Flooring upgrade on the first floor
- Kitchen cabinet upgrades and electrical improvements
- Relocation of the air conditioning unit (and potential replacement)
- Replacement of property siding

Per the Application, the proposed total cost of improvements is \$125,051.00 with the indicated loan request of between \$75,000.00 and \$90,000. The Applicant provided cost estimates for the work which are included as Attachment 4. The maximum loan amount is 50% of the total project cost, meaning the maximum that could be granted by the CDA would be \$62,525.50. The applicant did indicate they are applying under both the Home Improvement and Major Home Rehab categories.

Staff Review of Eligibility Criteria:

	Criteria	Criteria Met	Notes
1	Property is owner-occupied	Yes	Mr. Robledo and Ms. Crook have lived in this home for the last 9 months.
2	Assessed Property Value	Yes	Total Assessed Value (TAV) of \$239,900.00 as of 1/1/2020.
3	Assessed Property Value less than or equal to 120% of Median Sold Home Price	Yes	TAV of \$239,900.00 is less than the 120% of median sold home price of \$403,200.00 as of 7/14/2020.
4	Applicant to maintain at residence for at least 2 Years after Project	Yes	Mr. Robledo and Ms. Crook indicated that they will remain at the residence for at least 2 years after the improvements are completed.

5	Proposed Improvements are to Primary Structure	Yes	All of the proposed improvements are to the main structure.
5	Proposed improvements are eligible uses of Program Loan Funds	Yes	The applicant applied for both the Home Improvement and Major Home Rehab programs. The CDA may wish to clarify which items qualify under each program. The maximum loan request of \$62,525.50 could all be issued under the Major Home Rehab program, for which the proposed work appears to be eligible.
6	Proposed improvements will increase the assessed value of the home.	Yes	The addition of a master bedroom and additional bathroom, along with upgrades and updates to other parts of the house will increase the assessed value of the home.
7	Proposed improvements will improve the attractiveness of the home and the neighborhood to potential future home buyers.	Yes	The addition of a larger third bedroom and a second bathroom to the property, as well as increasing the basement size will increase appeal of the home. The inclusion of new siding to complete the work will also increase curb appeal of the property.
8	Applicant is in good financial standing and gives the City of Monona permission to contact their mortgage provider to confirm.	Yes.	The applicant has an existing mortgage with WHEDA, although they are in the process of refinancing with the Bank of Lake Mills. The applicant gave Staff permission to contact their lender.

	Performance Criteria	Staff Comments
A	Proposed improvements are well chosen, are an appropriate use of loan funds, and fulfill an obvious need for the housing structure.	Enlarging the main bedroom and adding a second bathroom to the property, as well as improving the basement and upgrading the kitchen are appropriate uses of loan funds.
B	Improvements are long-lasting and will enhance the quality of the home for years to come.	The proposed upgrades will enhance and modernize the home.

C	Proposed improvements will increase the energy efficiency of the home.	The inclusion of new insulation, and potentially a new air conditioning unit will enhance the homes efficiency as compared to the current products.
D	The home where proposed improvements will occur is in an area in need of improvements or is in an identified preference area. This may include accessibility improvements or additions allowing the applicant to age in place.	

Financing the Project:

The Applicant has indicated that they will use personal savings for their portion of the Project (\$62,525.50), assuming that CDA approves the full loan amount.

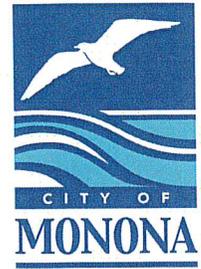
Recommendation:

Staff recommends CDA review and discussion of the application materials and make a recommendation on what, if any, loan amount should be provided for this Project.

Attachments:

- Attachment 1 – The Applicant’s Renew Monona Application Form
- Attachment 2 - Map of 5209 McKenna Road (from Dane County Property Information)
- Attachment 3 - Parcel Records for 5209 McKenna Road (from Dane County Property Information)
- Attachment 4 – Submitted Project Cost Estimate from Home Works Remodeling

Renew Monona Loan Program Application Form



Please complete and return to:
Monona City Hall
Attn: City Administrator/Economic Development Director
5211 Schluter Road
Monona, WI 53716
Phone: (608) 222-2525
BGadow@ci.monona.wi.us

All applications must be received by 5:00 pm on the closest work day to the first of the month to be considered for review at the next CDA meeting.

Applicant Information:

Name of Applicant: Alfonso Valdez Robledo
Address: 5209 McKenna Rd Phone: 608 886 6145
Name of Employer: General Electric (GE) Contact Person: Lori Molinski
Employer Address: 3300 Onmeda Drive
Employer Phone: 608 334 0143 Number of years at this job: 11 yrs
avaldezo@gmail.com

Co-Applicant Information:

Name of Co-Applicant: Beth M. Crook
Address: 5209 McKenna Rd Phone: 608 333 7017
Name of Employer: Waunakee Community School District Contact Person: Terri Reival
Employer Address: 915 Bethel Circle
Employer Phone: 608 849 2000 Number of years at this job: 6 yrs

Other Information:

Household size: 3 How long have you lived at your current residence? 9 months
Do you rent or own your current residence? Rent Own
Have you purchased a home before? No
If yes, how long ago?: _____

Property Being Purchased or Where Improvements will be Made:

Property Address: 5209 McKenna Rd
Number of bedrooms: 2 Age of home: 60+ yrs
Are you currently: purchasing this home? residing in this home?

If purchasing, please complete the following information:

Offered purchase price: \$ _____ Amount of down payment: \$ _____

Realtor name and company: _____

Realtor Phone: _____ Do you have an accepted offer to purchase? _____

Primary lender name: _____

Primary lender address: _____

Primary lender contact person: _____ Phone: _____

Please Check the Program for Which You Are Applying:

X	Program	Description	Max Loan Amount	Terms
<input checked="" type="checkbox"/>	Home Improvement Program	Home System Upgrades, Energy Efficiency, Renewable Energy Technology Installations, and Environmental Remediation (asbestos, lead)	\$15,000	Payments amortized over 10 years; 2% annual interest; Loan due upon sale or after 10 years. Construction must begin within 30 days of loan approval! Construction must be completed within 180 days of start of construction.
<input checked="" type="checkbox"/>	Major Home Rehab Program	Major work such as adding floor, rooms, rehab of kitchens, baths, etc.	\$75,000	
<input type="checkbox"/>	First-time Homebuyer Program	Provides no more than 40% of the required down-payment.	\$20,000	

Eligibility requirements apply, see program brochure for details.

All applicants, please use the space below to describe the home upgrades that you propose to make should you receive program loan funds:

*Description in attachment #1
Drawings in attachment #2
Kitchen Bid attachment #3
Addition + Project Bid Attachment #4*

Professional cost estimate attached.

Total Cost of Improvements: \$ \$125,051

Amount of Loan You Are Seeking:* \$ \$75,90,000

*The maximum loan amount is 50% of the total cost of improvements up to the limit of the program for which you are applying.

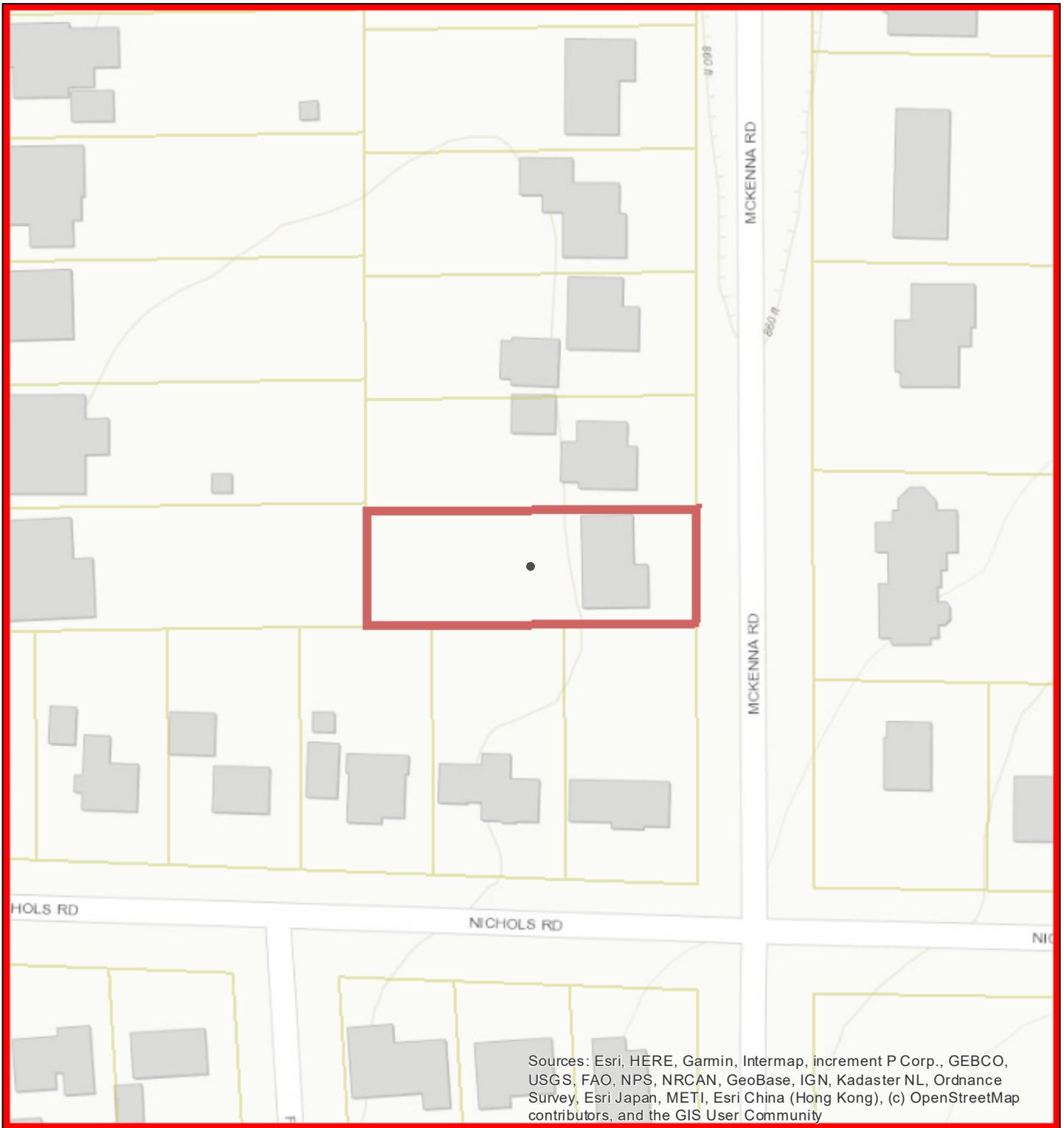
Certification: I hereby certify that to the best of my knowledge and belief, the content of the application is true and correct. I/we consent to the disclosure of such information for purposes of income and verification related to my/our application for financial assistance. I/we understand that giving false information on this application will result in disqualification from the Renew Monona Loan Program.

Signature of applicant: _____ Date: June 29 2020

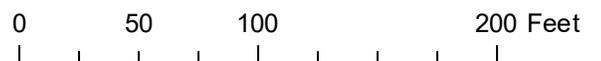
Signature of co-applicant: _____ Date: June 29 2020

For internal use only

5209 McKenna Road



July 14, 2020



Dane County Mask

-  Dane County Mask
-  Parcels



**Parcel Number -
258/0710-173-7701-5**

Current

Summary Report

[← Parcel
Parents](#)

Parcel Summary

More +

Municipality Name	CITY OF MONONA
Parcel Description	MOELYS ADDN LOT 1
Owner Name	ALFONSO VALDEZ ROBLEDO
Primary Address	5209 MCKENNA RD
Billing Address	5209 MCKENNA RD MONONA WI 53704

Assessment Summary

More +

Assessment Year	2020
Valuation Classification	G1
Assessment Acres	0.276
Land Value	\$72,800.00
Improved Value	\$167,100.00
Total Value	\$239,900.00

Show Valuation Breakout

Board Of Review

Board of Review dates have passed for the year

Starts: ~~06/30/2020-06:00 PM~~

Ends: ~~06/30/2020-08:00 PM~~

About Board Of Review

Show Assessment Contact Information ▼

Zoning Information

Contact your local city, village or town office for municipal zoning information.

Parcel Maps



[DCiMap](#)

[Google Map](#)

[Bing Map](#)

Tax Information

[E-Statement](#)

[E-Bill](#)

[E-Receipt](#)

[Pay Taxes Online](#)

«

< Newer

Older >

»

Tax Year 2019

Assessed Land Value	Assessed Improvement Value	Total Assessed Value
\$72,800.00	\$174,400.00	\$247,200.00
Taxes:		\$5,371.53
Lottery Credit(-):		\$258.99
First Dollar Credit(-):		\$93.34
Specials(+):		\$0.00
Amount:		\$5,019.20
2019 Tax Info Details		Tax Payment History

District Information		
Type	State Code	Description
REGULAR SCHOOL	3675	MONONA GROVE SCHOOL DIST
TECHNICAL COLLEGE	0400	MADISON TECH COLLEGE
METRO SEWERAGE	5150	MADISON METRO SEWER DIST

Recorded Documents				
Doc. Type	Date Recorded	Doc. Number	Volume	Page
WD	07/26/2019	5507744		

Show More ▼

DocLink

DocLink is a feature that connects this property to recorded documents listed above. If you'd like to use DocLink, all you need to do is select a link in this section. There is a fee that will require either a credit card or user account. Click here for instructions.

NOTE: Searching by the documents listed above will only result in that recorded document. For a more comprehensive search, please try searching by legal description and/or Parcel Number: 0710-173-7701-5. Tapestry searches by PIN or legal description are more comprehensive back through approximately 1995.

PLEASE TURN OFF YOUR POP UP BLOCKER TO VIEW DOCLINK DOCUMENTS. If you're unsure how to do this, please contact your IT support staff for assistance. You will be unable to view any documents purchased if your pop up blocker is on.



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210 Martin Luther King Jr. Blvd
City-County Bldg. Room 116
Madison, WI 53703



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Attachment #1

- We bought this house with a 3rd bedroom 1 bathroom ranch style and during the first month in order to improve the layout & flow of the house. We remove couple of walls to make the space between living room and kitchen bigger
(Permit # 1937113258)

Now we are seeking to create a 3rd bedroom (Master) and adding a bathroom in the Master bedroom.
With this addition, we would also expand the basement area with a walkout to the yard. (Back area).

This house also will require proper plumbing (update) in order to meet code and a proper layout of the pipes.

Flouring of the 1st floor needs to be update as is currently the original floor and needs upgrade.

Along with the kitchen that needs upgrade due to deterioration and old wiring (electrical)

A/C will be needed to be relocate and potentially upgrade as manufacture date is 1990's.

After addition is complete we will also be upgrading siding.



This section is the addition



All measurement in inches



Project name
Template2
Project number
0001-2811-9441

Included in the total price
Appliances \$1797

Total Price:
\$5801.38

Username (Email address or IKEA FAMILY number)

Important

IKEA cannot accept any liability for the accuracy of measurements or furniture layout. Prices in this program are for products you collect from IKEA, take home and assemble yourself. All requested delivery, assembly and installation services are charged separately and not included in the price. Although we do try to ensure that the information in this program is correct, we apologise for any product alterations that may occur.

Attachment #4

Home Works Remodeling

8820 N. Greenview Dr
Middleton, WI 53562-2556

Prepared For: Beth Groom & Alfonso Valdez
23'6" x 20' Addition with full walkout basement
Project Name:
Revision/Date: Rev A 3/4/2020

Permits & Plans			Subtotal	\$ 2,940.00
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Permit Drawings	X		Allowance	
Building	X		Allowance	
Zoning	X		Allowance	
Plumbing	X		Allowance	
HVAC	X		Allowance	
Electric	X		Allowance	
Lead Abatement	X		Allowance	
Misc				

Excavation		West Side Excavating PO Box 620183 Middleton, WI 53562-0183	Subtotal	Labor and Materials \$ 7,080.00
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Excavation	X		Allowance	
Gravel	X	3" stone at footing and basement floor	Allowance	
Culverts & installation				
Dirt hauled in/out	X	4 Loads	Allowance	
Backfill	X	Within 2' of final grade	Allowance	
Misc	X	Limited access for small machines to back of home	Allowance	

Concrete		K&M Concrete Construction 7556 West Old Sauk Rd Verona, WI 53593-9780	Subtotal	Labor and Materials \$ 14,340.00
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Foundation	X	7'9" x 8" wall with retaining wall to yard	Allowance	
Interior flat work	X		Allowance	
Exterior flat work				
Cut and remove existing slab	X	Access to basement	Allowance	
Equipment for limited access	X		Allowance	
Piers/cookies				
Misc				

Rough Lumber		Brunsell Lumber	Subtotal	Materials only \$ 12,000.00
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Rough materials	X		Allowance	
Trusses	X		Allowance	
Beams/Posts	X		Allowance	
Decking				
Hardware/Fasteners	X		Allowance	
Misc				

Home Works Remodeling

8820 N. Greenview Dr
Middleton, WI 53562-2556

Prepared For: Beth Groom & Alfonso Valdez
Project Name: 23'6" x 20' Addition with full walkout basement
Revision/Date: Rev A 3/4/2020



Roofing / Gutters	Roofing - Exterior Renovations 4205 Parview Road, Middleton WI 53562 Gutters - Madison Aluminum Products 2503 Pleasant View Rd, Middleton, WI 53562		Subtotal Labor and Materials \$ 5,520.00	
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Shingles	X	Addition only	Allowance	
Vents	X	Addition only	Allowance	
Gutters/down spouts	X	Addition only	Allowance	
Misc				

Siding	Siding - Exterior Renovations 4205 Parview Road, Middleton WI 53562 Gutters - Madison Aluminum Products 2503 Pleasant View Rd, Middleton, WI 53562		Subtotal Materials only \$ 7,440.00	
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Soffit	X	Match existing	Allowance	
Fascia	X	Match existing	Allowance	
Siding	X	Match existing	Allowance	
Siding Trims	X	Match existing	Allowance	
Misc				

Insulation	Foam Tech Insulation 2259 Cnty Hwy A Stoughton, WI 53589		Subtotal Labor and Materials \$ 5,640.00	
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Blown	X	Ceiling	Allowance	
Batted				
Nu-wool	X	All exterior walls and basement walls	Allowance	
Foam				
Misc				

Home Works Remodeling

8820 N. Greenview Dr
Middleton, WI 53562-2556

Prepared For: Beth Groom & Alfonso Valdez
23'6" x 20' Addition with full walkout basement
Project Name: basement
Revision/Date: Rev A 3/4/2020

Heating		RG Heating and Air Conditioning 305 West Street Waunakee WI 53597	Subtotal Labor and Materials \$ 4,500.00	
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Rough-in heating	X		Allowance	
Furnace/boiler				
Hot water radiators				
Air conditioning	X	Relocate	Allowance	
Separate zoned heat				
Air return line	X	Three supply	Allowance	
Air supply line	X	One return	Allowance	
Range hood venting				
Bath exhaust venting	X		Allowance	
laundry dryer venting				
Fireplace				
Misc				

Plumbing		Monona Plumbing & Fire Protection 3126 Watford Way Madison WI 53713	Subtotal Labor and Materials \$ 7,920.00	
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Rough-in plumbing	X		Allowance	
Trim plumbing	X		Allowance	
Tub/whirlpool tub				
Shower / Combo	X		Allowance	
Shower/tub faucet trim	X		Allowance	
Toilet	X		Allowance	
Sink	X		Allowance	
Sink faucet	X		Allowance	
Garbage disposal				
Outside hose bibs				
Gas line				
Misc				

Home Works Remodeling

Prepared For: Beth Groom & Alfonso Valdez
 23'6" x 20' Addition with full walkout basement
 Project Name: basement
 Revision/Date: Rev A 3/4/2020

8820 N. Greenview Dr
 Middleton, WI 53562-2556

Electrical	Lins Electric W. 13969 Selwood Lane Prairie Du Sac, WI 53578		Subtotal Labor and Materials \$ 4,290.00	
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Rough-in electrical	X		Allowance	
Trim electrical	X		Allowance	
Dimmers	X	One		
Phone/TV				
Room Fixtures				
Recessed lighting	X	Three	Allowance	
Undercabinet lighting				
Vanity lighting	X		Allowance	
Pendants/Sconces				
Bath fans	X	One Pannisonic Ultra Silent Series	Allowance	
Room fans				
Dedicated circuits	X		Allowance	
Arc fault breaker and tamper proof outlets				
Service upgrade				
Misc				

Drywall Plaster	R&D Drywall 408D S. Nine Mound Rd Verona, WI 53593		Subtotal Labor and Materials \$ 6,000.00	
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Drywall/blueboard (hang)	X			Basement not estimated
Drywall texture	X	Sand texture		
Plaster texture				
Patching/Blending	X			
Misc				

Paint Stain	Home Works Remodeling - Labor Mautz paint - Materials American Prefinishing - Prefinishing		Subtotal Labor and Materials \$ 6,240.00	
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Prime/paint	X	All new drywall surfaces	Allowance	
Stain	X	All new windows, doors and trims	Allowance	
Varnish	X	All new windows, doors and trims	Allowance	
Prefinish				
Misc				

Home Works Remodeling

Prepared For:

Beth Groom & Alfonso Valdez

23'6" x 20' Addition with full walkout basement

8820 N. Greenview Dr
Middleton, WI 53562-2556

Project Name:
Revision/Date:

Rev A 3/4/2020

Doors		Brunsell Lumber		Subtotal	
Item	Required	Description	Bid / Allowance / Owner Supply	Notes	
Front entry door					
Exterior doors	X	Two 6'0 sliding door	Allowance	One in basement	
French doors					
Interior doors	X	Three flush oak	Allowance		
Bi-fold doors					
Pocket doors					
Garage doors					
Storm doors					
Handsets	X		Allowance		
Factory finish					
Misc					
			Materials only	\$	8,160.00

Windows Glass		Brunsell Lumber - Andersen Windows Window Design Center - Marvin Windows Shower Door - Hellenbrand Glass Solatube - Brighter Concepts		Subtotal	
Item	Required	Description	Bid / Allowance / Owner Supply	Notes	
Double hung windows					
Casement windows	X	Andersen	Allowance	Includes new window for adjoining bedroom of existing house	
Awning windows					
Fixed windows					
Gliding windows					
Combination units					
Skylight					
Solatube					
Shower door					
Mirrors	X		Owner Supply		
Factory Finish					
Misc					
			Mat'l only - Windows Labor and Materials - Shower door/ Solatube	\$	4,080.00

Home Works Remodeling

Prepared For:

Beth Groom & Alfonso Valdez

23'6" x 20' Addition with full walkout basement

8820 N. Greenview Dr
Middleton, WI 53562-2556

Project Name:
Revision/Date:

Rev A 3/4/2020

Cabinetry Countertops	Cabinets - Shiloh Countertops - Ideal Surfaces		Subtotal Mat'l only - Cabinets Labor and Materials - Countertops	\$ 2,880.00
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Cabinets	X	Shiloh Wood species - maple stained Standard overlay doors/drawers Door style: Square raised Drawer style: slab Standard slow close mechanism No crown molding	Allowance	Vanity
Countertop	X	Cambria Quartz	Allowance	
Decorative hardware	X		Owner Supply	
Misc				

Flooring	Sergeniens		Subtotal Labor and Materials	\$ -
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Tile floor		See tilework		
Carpet	X	Bedroom and closet	Owner Supply	
Marmoleum				
Hardwood	X	See options		
Underlayment				
Special materials				
Misc				

Tilework Tub/Shower Surround	Franklin Tile 2515 Bigler Circle Verona WI 53593		Subtotal Labor and Materials	\$ 2,040.00
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Floor tile	X	Bathroom		
Accent tile				
Custom Tile Shower				
Bench/Shelf/Nook				
Kerdi system				
Dietra underlayment				
Grout				
Misc				

Home Works Remodeling

8820 N. Greenview Dr
Middleton, WI 53562-2556

Prepared For:

Beth Groom & Alfonso
Valdez

23'6" x 20' Addition
with full walkout

Project Name:

basement

Revision/Date:

Rev A 3/4/2020

Finish materials		Brunsell Lumber		Subtotal	
				Materials only	\$ 870.00
Item	Required	Description	Bid / Allowance / Owner Supply	Notes	
Base trim	X	Match existing	Allowance		
Casing	X	Match existing	Allowance		
Shoe molding	X	Match existing	Allowance		
Crown molding					
Wainscot					
Stair parts					
Bath accessories	X	Shower rod, towel bars/rings, paper holder, robe hooks etc	Owner Supply		
Misc					



Miscellaneous				Subtotal	
				Fees only	\$ 870.00
Item	Required	Description	Bid / Allowance / Owner Supply	Notes	
Dumpster	X	One 20 yard container	Allowance		
Energy Evaluation					
Equipment rental					
Egress window well					
Misc					

Home Works Remodeling

8820 N. Greenview Dr
Middleton, WI 53562-2556

Prepared For: Beth Groom & Alfonso Valdez
23'6" x 20' Addition with full walkout basement
Project Name: basement
Revision/Date: Rev A 3/4/2020

Labor		Home Works Remodeling	Subtotal	
			Labor only	\$ 16,440.00
Item	Required	Description	Bid / Allowance / Owner Supply	Notes
Project Management	X		Allowance	
Demolition	X		Allowance	
Framing	X		Allowance	
Trusses	X		Allowance	
Siding				
Decking				
Doors	X		Allowance	
Windows	X		Allowance	
Installation	X		Allowance	
Finish trim	X		Allowance	
Shop time				
Misc				

Totals	
Bid and Allowances	\$ 102,810.00
Labor	\$ 16,440.00
Grand Total	\$ 119,250.00

Options (Price not included in total)		
Hardwood flooring	Refinishing of hardwood flooring	Approx. \$4.25 s.f.
Hardwood flooring	Installation on new 2 1/4" red oak flooring. Sanded and sealed on site.	Approx. \$ 13.90 s.f.



5211 SCHLUTER ROAD ■ MONONA, WI 53716-2598
CITY HALL (608) 222-2525
FAX (608) 222-9225
<http://www.mymonona.com>

July 20, 2020

To: Community Development Authority (CDA) Members

From: Bryan Gadow, City Administrator

RE: Amendment(s) to Renew Monona Loan Program Policy Documents

In June 2019, the CDA and the City Council approved the reinstatement of the Renew Monona Loan Program (RMLP). Since that time, the CDA has received and reviewed funding requests from nine different applicants.

At the last CDA meeting, members noted that under the current RMLP guidelines, eligibility for funding was tied to whether a property's assessed value was at or below 120% of the median sale price for residential property in the community. Members expressed concern that this media sale price could fluctuate significantly based on property sales within any given year. This could in turn significantly impact the median assessed value eligibility threshold.

CDA members asked staff to review a potential amendment to change the median sale price threshold to a median assessed value threshold. Staff has drafted a redline version of this potential amendment for CDA consideration, based on 2020 assessment data from the City Assessor.

Please let me know if you have any questions about this matter.

POLICE DEPARTMENT
5211 Schluter Road
222-0463

COMMUNITY CENTER
1011 Nichols Road
222-4167

MONONA SENIOR CENTER
1011 Nichols Road
222-3415

FIRE DEPARTMENT
5211 Schluter Road
222-2528

Renew Monona Loan Program



Description

The City of Monona's *Renew Monona Loan Program* is a housing stock renewal loan program that is intended to improve the quality, functionality, affordability and attractiveness of homes in Monona. The program was created by the City of Monona Community Development Authority (CDA) and will be administered by the City of Monona. Most of Monona's housing stock was constructed in the 1950's and although the homes have been well maintained, many of them no longer meet the needs of today's households, particularly young families with children. We have heard from many families interested in buying a house in Monona that the cost of bringing a home up to modern standards, when added to the initial purchase price, makes a Monona home purchase unaffordable compared to purchasing a newer home in a suburban location.

Funds from the program will be available in the form of a loan with 2% interest over the life of the loan. Loans will be funded using TIF funds from a closing TIF district in the city. The primary goal of the program includes rejuvenating existing and aging housing stock to make it more attractive to buyers, especially young families. Important byproducts resulting from home improvements made through this program include the sustaining of a school-age population of children, improving the energy efficiency of the city's housing stock, stabilizing the city's tax base, and building and enhancing community capacity and aesthetics.

Eligibility Requirements

Eligible applicants include those purchasing a home for the first time or residing in a home within the City of Monona looking to make substantial system or structural improvements to the home to enhance its safety, functionality or efficiency, and bring it to modern standards. Homes must be occupied by the funding applicant as the owner for a period of two (2) years after the purchase or the time improvements are made to be eligible for funding. There are no applicant age, income, or other restrictions on applying for this program. Those purchasing a home and seeking loan funds to make improvements must prove the existence of a legitimate primary mortgage lender.

Homes eligible for purchase or improvements under this program include **owner-occupied homes in Monona** whose most recent assessed value is at or below **120%** of the median ~~sale price~~assessed value of residential property in the city as reported ~~on www.realtor.com/local/Monona-WI~~ by the [City Assessor](#). Furthermore, eligible homes include those in the City of Monona being purchased whose sale price is valued at or below 120% of the median ~~sale price~~assessed value of residential property in Monona. This determination will be based on the most recent figure, at the time of the loan application, from City of Monona assessment data. For example, on Jan 1, ~~2019-2020~~ the median ~~sale price~~assessed value of single family residential property was ~~\$298,500~~\$212,000. Eligible homes would be those assessed at or below ~~\$254,400~~\$358,200 (120% of ~~\$298,500~~\$212,000).

Eligible Uses of Loan Funds

First-Time Homebuyer: Funds may be used toward the down payment on the purchase of an eligible home by a first-time homebuyer.

Home System Upgrades: Funds may be used to make upgrades to home systems including **electrical, plumbing, mechanical**, or other systems or functionally outdated features, to bring them into compliance with current standards and codes, or to modernize them to current quality, efficiency, and performance levels. Replacement or maintenance of home components that are expected to be replaced periodically such as roofing, water heaters, and fixtures will not be funded.

Energy Efficiency: Funds may be used for **window replacement** and **insulation improvements** and other measures that will increase the heating and cooling efficiency and overall performance of the home. Furnaces replacement is not an eligible use of program funds.

Renewable Energy Technology Installation: Funds may be used for the purchase and installation of renewable energy technologies for the residence, such as roof-mounted solar panels.

Major Rehab: Many of the existing homes in the City of Monona are smaller in size and are considered less desirable to new home purchasers looking for more living space. Therefore, program funds may be used for **the addition of or significant improvement to living space**, such as adding a floor or a room or rehabbing a kitchen or bathroom. Tear-downs, auxiliary structures, unattached garages not used to park cars are not eligible uses of program funds.

Environmental Remediation: Funds may be used to remove asbestos siding, remediate lead-based paint or remediate other environmental issues of the home. Soil remediation or other activities not part of the house are not eligible uses of program funds.

Repayment of any loan application fees incurred as part of this program is an eligible use of loan funds received. All decisions regarding loan fund disbursements, loan eligibility, and the uses of loan funds will be made by the City of Monona Community Development Authority.

Please note that funds may only be used for improvements made on the **primary housing structure**, and not any auxiliary structures on a lot. Work on garages where the primary use is parking cars used by the resident household is an eligible use of loan funds; however, higher priority will be given to attached garages.

Loan Terms and Conditions

Loans will consist of **2% interest** over the life of the loan, and act as a deferred second mortgage with **payments amortized over ten (10) years** following the award of the loan, or at sale (or refinancing) of the home, whichever comes sooner. At the end of the loan term, the amount of the loan must be repaid in full.

The maximum amount of any loan award will be **50%** of the total down payment or improvement costs, whichever is less up to the maximum for the program for which the applicant is applying as described in the following table.

Program	Description	Max Loan Amount	Terms
Home Improvement Program	Home System Upgrades, Energy Efficiency, Renewable Energy Technology Installation, and Environmental Remediation (asbestos, lead)	\$15,000	Payments amortized up to 10 years; 2% annual interest; Loan due upon sale or after 10 years. Construction must begin within 30 days of loan approval' Construction must be completed within 180 days of start of construction.
Major Home Rehab Program	Major work such as adding floor, rooms, rehab of kitchens, baths, etc.	\$75,000	
First-time Homebuyer Program	Provides no more than 40% of the required down-payment.	\$20,000	
<i>Eligibility requirements apply, see program information for details.</i>			

Applicants must work with a local financial institution or provide another source of identifiable funding to cover the balance of home improvement costs not covered by the loan (See list of Participating Lenders below). Construction on improvements must begin within thirty (30) days of loan approval and be completed within one-hundred eighty (180) days of the start of construction. The Monona CDA will keep record of the dates of loan approval and the start of construction. The Monona CDA reserves the right to take and use photographs, as well as develop project summaries of individual improvement projects for publicity purposes.

Participating Lenders (Signed onto Program presently)	
Monona Bank	

For questions regarding the program, please contact:

City Administrator/Economic
Development Director
City of Monona
5211 Schluter Road, Monona, WI 53716
(608) 222-2525
BGadow@ci.monona.wi.us

Timetable**AMEND THE ALLOCATION OF TAX INCREMENT DISTRICTS #6 & #8
AMEND THE BOUNDARY OF TAX INCREMENT DISTRICT #5**

Action	Party Responsible	Date
1. Prepare initial draft amendments for TID #5 and TID #6;	GWB/ City Staff	3/10/20 – 5/19/20
2. CDA Meeting: <ul style="list-style-type: none"> Review draft TID amendments, suggest edits Request TID #8 allocation amendment 	GWB	5/26/20
3. Send letter to taxing jurisdictions notifying jurisdictions of TID actions	GWB/City Clerk	5/29/20
4. Edit TID #6, #8 and TID #5 project plan and boundary amendments, as needed.	GWB	5/27/20 – 6/16/20
5. CDA Meeting: <ul style="list-style-type: none"> Review 2nd draft TID Project Plan amendments Schedule public hearing (if no further discussion needed) 	CDA	6/23/20
6. Prepare public hearing drafts of amended Project Plans for TIDs #5, #6 and #8.	GWB	6/24/20 – 7/7/20
7. Prepare Public hearing notice, send to newspaper	GWB/City Staff	8/3/20
8. Prepare JRB meeting #1 send notice to newspaper.	GWB/City Staff	8/3/20
9. Publish notice for JRB meeting #1	Monona Herald Independent	8/6/20
10. Mail Out JRB packets	GWB	8/7/20
11. Send public hearing notices to taxing entities. (15 days before hearing)	GWB/City Staff	8/7/20
12. Publish notices for public hearings on TID actions – first insertion	GWB/City Staff	8/6/20
13. JRB – First Meeting to Consider TID Actions: Confirm chairperson and at-large member, discussion of draft TID Project Plan and amendments (at least 5 days after publication of JRB meeting notice; latest date 14 days after first notice of Public Hearing) JRB Meeting #1. An August 10th or 11th JRB meeting will require notice to be published on July 30th.	JRB	8/10/20 – 8/20/20
14. Publish notices for TID Project Plan public hearing – second insertion	Monona Herald independent	8/13/20
15. CDA Meeting: <ul style="list-style-type: none"> Public hearing –TID #5 Boundary Amendment, TID #6 and TID #8 Allocation Amendment (at least 7 days after publication of public notice) Adoption of TID actions, submission to City Council for Approval 	CDA	8/25/20
16. Provide information to City Attorney for attorney opinion letter.	GWB	7/29/20
17. City Council Meeting: <ul style="list-style-type: none"> Review TID #5, #6 and #8 amendments Approve TID actions 	City Council	9/7/20
18. JRB meeting #2 notice to newspaper	GWB/City Staff	9/14/20
19. Mail out JRB packets for meeting #2	GWB/City Staff	9/14/20
20. Publish JRB meeting #2 notice	Monona Herald Independent	9/17/20
21. JRB – Final Meeting on TID Creation: Approval of TID creation by JRB (At least 5 days after publication of meeting notice and within 30 days of Board approval)	JRB	9/22/20 – 9/30/20
22. JRB notifies City Council of approval (within 7 days of JRB decision)	JRB	9/30/20
23. Prepare DOR amendment packets	GWB	9/30/20 – 10/18/20
24. Submit TID amendment information to Wisconsin Department of Revenue (Base Year Packet).	GWB/City Clerk	10/30/20

The Monona Herald Independent is published every Thursday; notices must be provided prior to noon the previous Monday.

CITY OF MONONA
NOTICE OF PUBLIC HEARING ON
THE AMENDMENT OF TAX INCREMENT DISTRICT #5

NOTICE IS HEREBY GIVEN that on August 25, 2020 at 6:30 p.m. the Community Development Authority (CDA) of the City of Monona will hold a Public Hearing pursuant to sections 66.1105(4)(a) and 66.1105(4)(e) of Wisconsin State Statutes at Monona City Hall, 5211 Schluter Road, Monona, WI.

The City is proposing to amend the boundary for Tax Increment District (TID) #5 to subtract certain parcels to strengthen the financial performance of the TID. TID #5 is located at the corner of Owen Road and Monona Drive and contains the Heritage Monona Senior Living Center. A map of TID #5 may be found on the Community Development Authority's page on the City's website. Reasonable opportunity will be afforded to all interested parties to express their view on the proposed amendment.

A copy of the TID #5 boundary amendment will be available for inspection and will be provided upon request. Arrangements for either inspection or receipt of a copy of the amended Project Plan may be made by contacting Bryan Gadow, City Administrator, City of Monona, 5211 Schluter Road; Phone (608) 222-2525 or by visiting the City website at www.mymonona.com.



Publication Date: August 6, 2020 and August 13, 2020
Proof of Publication Requested.

**CITY OF MONONA
NOTICE OF PUBLIC HEARING ON
THE AMENDMENT OF TAX INCREMENT DISTRICT #6**

NOTICE IS HEREBY GIVEN that on August 25, 2020 at 6:30 p.m. the Community Development Authority (CDA) of the City of Monona will hold a Public Hearing pursuant to sections 66.1105(4)(a) and 66.1105(4)(e) of Wisconsin State Statutes at Monona City Hall, 5211 Schluter Road, Monona, WI.

The City is proposing to amend the allocation for Tax Increment District (TID) #6 to allow the TID to share revenue with TIDs #4, #5, and #9. TID #6 is located at the corner of East Broadway and Stoughton Road and contains the UW Health Clinic, Dean Clinic, and Menard's. A map of TID #6 may be found on the Community Development Authority's page on the City's website. Reasonable opportunity will be afforded to all interested parties to express their view on the proposed amendment.

A copy of the TID #6 allocation amendment will be available for inspection and will be provided upon request. Arrangements for either inspection or receipt of a copy of the amended Project Plan may be made by contacting Bryan Gadow, City Administrator, City of Monona, 5211 Schluter Road; Phone (608) 222-2525 or by visiting the City website at www.mymonona.com.

Publication Date: August 6, 2020 and August 13, 2020
Proof of Publication Requested

**CITY OF MONONA
NOTICE OF PUBLIC HEARING ON
THE AMENDMENT OF TAX INCREMENT DISTRICT #8**

NOTICE IS HEREBY GIVEN that on August 25, 2020 at 6:30 p.m. the Community Development Authority (CDA) of the City of Monona will hold a Public Hearing pursuant to sections 66.1105(4)(a) and 66.1105(4)(e) of Wisconsin State Statutes at Monona City Hall, 5211 Schluter Road, Monona, WI.

The City is proposing to amend the allocation for Tax Increment District (TID) #8 to allow the TID to share revenue with TIDs #4, #5, and #9. TID #8 is located along West Broadway and contains the Treysta development and Lottes Park. A map of TID #8 may be found on the Community Development Authority's page on the City's website. Reasonable opportunity will be afforded to all interested parties to express their view on the proposed amendment.

A copy of the TID #8 allocation amendment will be available for inspection and will be provided upon request. Arrangements for either inspection or receipt of a copy of the amended Project Plan may be made by contacting Bryan Gadow, City Administrator, City of Monona, 5211 Schluter Road; Phone (608) 222-2525 or by visiting the City website at www.mymonona.com.

Publication Date: August 6, 2020 and August 13, 2020