

## AGENDA

FINANCE AND PERSONNEL COMMITTEE  
MONONA PUBLIC LIBRARY MUNICIPAL ROOM  
1000 NICHOLS ROAD  
MONDAY, OCTOBER 5, 2020

6:45 P.M.

Remote Teleconference Meeting via ZOOM

This meeting may be viewed LIVE at <https://www.youtube.com/MononaTV>

### NOTICE OF ELECTRONIC MEETING

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 #7 of Public Health Madison & Dane County dated July 1, 2020 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.

1. Call to Order.
2. Roll Call.
3. Approval of Minutes from September 21, 2020.
4. Appearances.
5. Unfinished Business. (None)
6. New Business.
  - A. Approval of Funds for Renew Monona Home Loan for Chris Stewart and Shannon Hodel, 5407 McKenna Road.
  - B. Approval of Funds for Renew Monona Home Loan for Rick Bernstein, 4913 McKenna Road.
  - C. Approval of Funds for Renew Monona Home Loan for Natallia Hanson, 6015 Gateway Green.
  - D. Consideration of Resolution 20-10-2444 Approving the 2021-2025 Capital Improvements Program and 2021 Capital Borrowing.
  - E. Acceptance of General Fund Accounts Payable Checks Dated September 18–October 1, 2020. (Documentation of invoices paid is available in the City Clerk’s office.)
7. Adjournment.

## DIRECTIONS TO ATTEND MEETING ELECTRONICALLY

You may attend via videoconference at <https://us02web.zoom.us/j/85074691282> 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: 850 7469 1282.

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

PHONE NUMBER: 1-312-626-6799 / MEETING ID: 850 7469 1282, FOLLOWED BY #

Please mute your phone when not speaking to ensure best possible audio quality.

## PUBLIC APPEARANCE BY ZOOM

Persons interested in publicly appearing before the Finance & Personnel Committee via computer or phone on the Zoom application are asked to submit an [Appearance Before a City Committee form](#) so that we can accommodate all online and phone requests to speak. Please submit your form as soon as possible. Requests will be accepted before and during the meeting until the Appearances section is closed. Requests submitted after the Appearances section is closed will not be able to speak. Link to form: <https://www.mymonona.com/FormCenter/Committee-Application-11/Appearance-Before-a-Committee-Citizen-Co-82>

## WRITTEN COMMENTS

You can send written comments on agenda items by utilizing the City Council Contact Form found at: <http://mymonona.com/FormCenter/City-Council-Contact-Form-3/City-Council-Contact-Form-64>

**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.

FINANCE AND PERSONNEL COMMITTEE MINUTES  
September 21, 2020

The regular meeting of the Finance and Personnel Committee for the City of Monona, via Zoom, was called to order by Mayor O'Connor at 6:52 p.m.

Present: Mayor Mary K. O'Connor and Alderpersons Doug Wood and Kathy Thomas

Also Present: City Administrator Bryan Gadow, Finance Director Marc Houtakker, and City Clerk Joan Andrusz

APPROVAL OF MINUTES

A motion by Alder Thomas, seconded by Alder Wood to approve the Minutes of the September 8, 2020 Finance & Personnel Committee meeting, was carried.

APPEARANCES AND UNFINISHED BUSINESS

There were no Appearances or Unfinished Business.

NEW BUSINESS

City Administrator Gadow reported the following is per the City Council decision to provide earnest money as a portion of the purchase agreement for the San Damiano property. It will be funded using Capital Budget savings on the McKenna Road project.

A motion by Alder Wood, seconded by Alder Thomas to approve Resolution 20-9-2443 Amending the 2020 Capital Budget to Fund Earnest Money for the Purchase of the San Damiano Property. On a roll call vote, all members voted in favor of the motion.

Finance Director Houtakker reviewed recent Accounts Payables and answered member's questions.

A motion by Alder Thomas, seconded by Alder Wood to Accept General Fund Accounts Payable Checks Dated September 4, 2020 through September 17, 2020, was carried.

A motion by Alder Thomas, seconded by Alder Wood to adjourn, was carried. (7:00 p.m.)

Joan Andrusz  
City Clerk

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

**MEETING DATE: September 22, 2020**

**AGENDA ITEM 7.A.  
CASE NO. 2020-7**

**Project:** Request for Renew Monona Loan Funds  
**Project Address:** 5407 McKenna Road  
**Applicant:** Chris Stewart and Shannon Hodel

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**Proposal Summary:**

Mr. Chris Stewart and Ms. Shannon Hodel (the "Applicant") own the property at 5407 McKenna Road (the "Property"), and have submitted a Renew Monona Loan application requesting \$7,488 from the Home Improvement category (the "Application") to conduct the following improvements to the existing residence (the "Project"):

- Replacement of property siding for both the main structure and detached garage adding house wrap
- Addition of 3-4 foot pre-fabricated stone on front section of house

Per the Application, the proposed total cost of improvements is \$14,977.00 with the indicated loan request of \$7,488.00. The Applicant provided cost estimates for the work which is 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 \$7,488.50.

**Staff Review of Eligibility Criteria:**

	<b>Criteria</b>	<b>Criteria Met</b>	<b>Notes</b>
1	Property is owner-occupied	Yes	Mr. Stewart and Ms. Hodel have lived in this home for the last 16 years.
2	Assessed Property Value	Yes	Total Assessed Value (TAV) of \$212,700.00 as of 1/1/2020.
3	Assessed Property Value less than or equal to 120% of Median Sold Home Price	Yes	TAV of \$212,700.00 is less than the 120% of the median assessed value of residential properties of \$358,200.00 as of 01/01/2020.
4	Applicant to maintain at residence for at least 2 Years after Project	Yes	Mr. Stewart and Ms. Hodel 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	The proposed improvements are to the main structure and detached garage.
5	Proposed improvements are eligible uses of Program Loan Funds	Yes	The applicant applied for the Home Improvement

			program, which includes energy efficient upgrades. The requested loan amount is within the maximum loan amount for the program.
6	Proposed improvements will increase the assessed value of the home.	Yes	New siding (and stonework) will enhance the exterior of the home, and likely increase assessed value.
7	Proposed improvements will improve the attractiveness of the home and the neighborhood to potential future home buyers.	Yes	The siding will enhance curb appeal of the property, as well as increasing efficiency of both the main structure and the garage.
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. 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.	The existing siding is in need of upgrading, and the lack of either a wrap on the house, or sheeting in the garage significantly compromises the energy efficiency of the existing structure. The CDA may choose to discuss if the stonework in particular is an appropriate use of loan funds under the Energy Efficiency category.
B	Improvements are long-lasting and will enhance the quality of the home for years to come.	The proposed upgrades will enhance the home and increase the curb appeal.
C	Proposed improvements will increase the energy efficiency of the home.	The inclusion of Tyvek wrap on the main structure, and sheeting within the garage will enhance the energy efficiency as compared to the current siding.
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 (\$7,489.00), assuming that CDA approves the full loan amount. The Applicant has not started work on the project, and will wait until a decision has been made by the CDA.

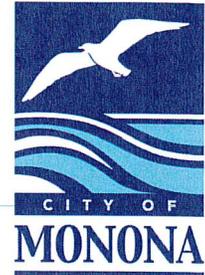
**Recommendation:**

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 5407 McKenna Road (from Dane County Property Information)
- Attachment 3 - Parcel Records for 5407 McKenna Road (from Dane County Property Information)
- Attachment 4 – Submitted Project Cost Estimates from Heins Contracting and Legacy Exteriors

# 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](mailto: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: Chris Stewart  
Address: 5407 McKenna Rd Monona Phone: 608 220 4113  
Name of Employer: Coyle Carpet Contact Person: \_\_\_\_\_  
Employer Address: 250 W. Beltline Hwy Madison WI 53713  
Employer Phone: 608-628-6341 Number of years at this job: 1

## Co-Applicant Information:

Name of Co-Applicant: Shannon Hodel  
Address: 5407 McKenna Rd Monona Phone: 608 843 5323  
Name of Employer: Meriter Hospital Contact Person: David Berry  
Employer Address: 202 S. Park St, Madison, WI 53715  
Employer Phone: 608 417 5830 Number of years at this job: 8.5

## Other Information:

Household size: 6 How long have you lived at your current residence? 16 years  
Do you rent or own your current residence?  Rent  Own  
Have you purchased a home before? no  
If yes, how long ago?: n/a

## Property Being Purchased or Where Improvements will be Made:

Property Address: 5407 McKenna Rd Monona, WI 53716  
Number of bedrooms: 2 Age of home: 60+ years  
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
X	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.
	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	

*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:

*We are looking to re-side our house and garage.*

Professional cost estimate attached.

Total Cost of Improvements: \$ 14,977

Amount of Loan You Are Seeking:\* \$ 7,488

\*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: [Signature] Date: 8-17-2020

Signature of co-applicant: [Signature] Date: 8-17-20

For internal use only

# 5407 McKenna Road



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), (c) OpenStreetMap contributors, and the GIS User Community

September 9, 2020

## Dane County Mask

-  Dane County Mask
-  Parcels

0 50 100 200 Feet



**Parcel Number -  
258/0710-202-0518-6**

**Current**

**Summary Report**

[← Parcel  
Parents](#)

**Parcel Summary**

**More +**

Municipality Name	CITY OF MONONA
Parcel Description	BAY VIEW ADDN LOT 48
Owner Names	CHRISTOPHER J STEWART SHANNON L HODEL  
Primary Address	5407 MCKENNA RD
Billing Address	5407 MCKENNA RD MONONA WI 53716

**Parcel Maps**



[DCiMap](#)

[Google Map](#)

[Bing Map](#)

**Assessment Summary**

**More +**

<b>Assessment Year</b>	<b>2020</b>
Valuation Classification	G1
Assessment Acres	0.186
Land Value	\$56,700.00
Improved Value	\$156,000.00
Total Value	\$212,700.00

**Tax Information**

[E-Statement](#)

[E-Bill](#)

[E-Receipt](#)

[Pay Taxes Online](#)

[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.**

«

< Newer

Older >

»

**Tax Year 2019**

Assessed Land Value	Assessed Improvement Value	Total Assessed Value
\$56,700.00	\$140,200.00	\$196,900.00
<b>Taxes:</b>		\$4,278.54
<b>Lottery Credit(-):</b>		\$258.99
<b>First Dollar Credit(-):</b>		\$93.34
<b>Specials(+):</b>		\$0.00
<b>Amount:</b>		\$3,926.21
<a href="#">2019 Tax Info Details</a>		<a href="#">Tax Payment History</a>

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	10/19/2016	5277421		

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: 0710-202-0518-6. 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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Council  
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210 Martin Luther King Jr. Blvd  
City-County Bldg. Room 116  
Madison, WI 53703



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**Heins Contracting**  
 1930 s stoughton rd  
 Madison, WI 53716  
 Phone: (608) 732-9063

*This is the bid we are going with*

07/31/2020

**Company Representative**  
 Derek Popp  
 Phone: (608) 553-1879  
 derek@heinscontracting.com

*[Handwritten signature]*

**Chris Stewart**  
 5407 McKenna Road  
 Monona, WI 53716 (608) 220-4113

Job: Chris Stewart

**Siding Section**

- Remove existing siding
- Install new House wrap
- Tape House wrap seams
- Install new Vinyl accessories as needed
- Install new Vinyl siding
- Install new aluminum flashing's
- Seal around existing exterior penetrations
  
- Haul away all waste

Heins Contracting warrants all siding labor work for 10 years.

Heins Contracting to pull all needed permits.

**\*\*Payment in full upon substantial completion.\*\***

**\$9,850.00**

**Siding Section**

- Install 3-4 foot pre-fabricated stone on front section of house

**\$5,127.00**

**Purchaser(s) Acknowledge(s):**

- Purchaser(s) acknowledge receipt of a true copy of this contract, acknowledges they have read and know the contents and understands that no other agreements verbal or otherwise are binding on the parties there to and that same contains to the entire contract.
  
- Purchaser(s) agree(s) to pay **BE HEINS CONTRACTING, LLC** or its assigns the unpaid balance due on substantial completion to be paid upon all terms and conditions set forth herein including any necessary signatures on documents that may be requested by finance source or assigns to secure this transaction.

- **NOTICE OF LIEN RIGHTS:** AS REQUIRED BY THE WISCONSIN CONSTRUCTION LIEN LAW, **BE HEINS CONTRACTING, LLC**, HEREBY NOTIFIES OWNER THAT PERSONS OR COMPANIES FURNISHING LABOR OR MATERIALS FOR THE CONSTRUCTION ON OWNERS LAND MAY HAVE LIEN RIGHTS ON OWNER'S LAND AND BUILDING IF NOT PAID. THOSE ENTITLED TO LIEN RIGHTS, IN ADDITION TO **BE HEINS CONTRACTING, LLC** ARE THOSE WHO CONTRACT DIRECTLY WITH THE OWNER OR THOSE WHO GIVE THE OWNER NOTICE WITHIN 60 DAYS AFTER THEY FIRST FURNISH LABOR OR MATERIALS FOR THE CONSTRUCTION, ACCORDINGLY, OWNER WILL RECEIVE NOTICES FROM THOSE WHO FURNISH LABOR OR MATERIALS FOR THE CONSTRUCTION, AND SHOULD HAVE A COPY OF EACH NOTICE RECEIVED TO THEIR MORTGAGE LENDER, IF ANY. **BE HEINS CONTRACTING, LLC** AGREES TO COOPERATE WITH THE OWNER AND THEIR LENDER, IF ANY. TO SEE WHAT ALL POTENTIAL LIEN CLAIMANTS ARE DULY PAID.
- **ADDITIONAL WORK:** ALL ADDITIONAL work **NOT** found on initial inspection by **BE HEINS CONTRACTING, LLC** will be **ADDED** as a change order upon homeowners request.
- **SELLER'S LIMITED WARRANTY:** Is as specified and will transfer to the Purchaser all manufacturer's written warranties. **BE HEINS CONTRACTING, LLC** specifically excludes from warranty coverage and accepts no responsibility for: 1.) Defects in appliances and equipment covered by manufacturers warranties; 2.) Items not installed by **BE HEINS CONTRACTING, LLC** or its sub-contractors or provided by their material suppliers; 3.) Special incidental or consequential damages of any sort, such as lighting, gale force winds, tornado, ice dams (thawing and refreezing of ice, water or snow) or any other damage on or below the roof line due to leaks by excessive snow or wind-driven rain, ice or hail or other such manufacturer's warranties are available. **BE HEINS CONTRACTING, LLC** shall provide to Purchaser documentation of all manufacturer's warranties for materials or equipment provided hereunder, to the extent that such manufacturer's warranties are available. **BE HEINS CONTRACTING, LLC SHALL HAVE NO OBLIGATION TO ISSUE WARRANTY WORK UNLESS AND UNTIL FINAL PAYMENT HAS BEEN MADE IN FULL**
- **ALL SURPLUS MATERIALS ARE THE PROPERTY OF BE HEINS CONTRACTING, LLC.** ALL materials delivered/ordered by **BE HEINS CONTRACTING, LLC** to the Purchaser's premises shall be stored and safely kept by the Purchaser's and NO rental OR storage charges therefore shall be made or assessed by Purchaser's. **BE HEINS CONTRACTING, LLC** shall not be liable in any way to the Purchaser for the removal of those materials. **BE HEINS CONTRACTING, LLC** IS not responsible for damage caused by building material supplier delivery vehicle. Purchaser will supply electricity to perform all necessary work.
- **BE HEINS CONTRACTING, LLC** will purchase all necessary building permits; perform all work in a workmanlike manner and in accordance with local building specifications.
- **ALL** payments will be made to **BE HEINS CONTRACTING, LLC**. **ALL** estimates/contracts will be cash based. **IF** using **credit/debit card** as payment method this **MUST** be stated before signing of contract. Contract amount is subject to change IF payment method is approved (Interest rates vary per contract amount and type of card used). **BE HEINS CONTRACTING, LLC** has the right to charge a minimum of \$35 for any returned check in addition to amount due. Financing is available to those who qualify. Interest rate may vary.
- During the duration of the work, the client(s) homeowners insurance will be responsible for any interior damage as long as **BE HEINS CONTRACTING, LLC** has taken appropriate action to protect the roof or siding during the repairs.
- **BE HEINS CONTRACTING, LLC** reserves the right to revoke the proposal 90 days from date accepted if materials are not available. After 90 days **BE HEINS CONTRACTING, LLC** reserves the right to adjust contract if material prices increase.
- ANY representations, statements, or other communications NOT written on this agreement are agreed to be immaterial, and not relied on by either party, and do NOT survive the execution of this contract.
- **FAILURE TO PAY:** If the Purchaser fails to make payments as provided herein, after ten (10) days written notice, **BE HEINS CONTRACTING, LLC** may remove all materials installed pursuant to this contract.
- **SIGNING OF DOCUMENTS:** If the contract price is to be financed with a lending institution, the Purchaser agrees to sign any and all required documents, including but not limited to any credit application, not a deed of trust. The act of signing shall be done on the lending institution's contract documents and forms. These documents and forms shall merge with and become a part of this contract as though more fully shown on the face thereof.

- **Uncontrollable Delay:** **BE HEINS CONTRACTING, LLC** is not responsible for delay or inability to perform caused by strikes, acts of God, riots, shortages, weather conditions, public authorities or other causes or casualties beyond his control, or due to the Purchaser's conduct.
- **HIDDEN CONDITIONS / UTILITIES:** Contractor has prepared its estimate of the Contract Sum without knowledge of any preexisting deficiencies or defects in the building not apparent from a visual inspection of the building. If any such conditions, including without limitation, nail pops, existence of plumbing vent pipes, wood rot, or decking deflection become evident to Contractor after commencement of the work, Contractor shall adjust the Contract Sum for the cost of time and materials accordingly. If owner has knowledge of or suspects such conditions, Owner shall advise Contractor of such conditions prior to Contractor's commencement of the work, so that Contractor can provide Owner with the best possible estimate to the Contract Sum. Contractor shall not be liable for damage to stucco, brick, siding and any reset items such as chipping or breaking the stucco and brick and denting and scratching of siding or windows. Such damage frequently occurs, especially with respect to very steep roofs or where there are rotted or rusted areas. Contractor shall have no liability with respect to any solar panels, satellite dishes or weather instruments located on the building. Owner agrees to coordinate and work to be performed around such solar panels, and weather instruments with a contractor qualified in the repair and/or installation of such devices. Owner agrees to remove or cover all furniture and flooring located under a skylight. Owner shall pay for any utilities used during construction, including electricity. Owner expressly permits Contractor to include photographs, depictions, information or representations regarding the work in Contractor's sales or marketing materials and Contractor may place temporary advertising/marketing signage on the property during the construction of the work.
- **EXPECTATIONS:** The work will cause inconveniences and annoyances. Contractor shall remove debris related to the work and leave the property in a condition reasonably acceptable to Owner.
- **DEFAULT; RIGHT TO CURE LAW:** This Contract may not be terminated without the consent of both parties, except as expressly set forth in this Contract. If the work shall be stopped for a period in excess of 10 consecutive days by the order of Owner, any court or other public authority, Contractor may terminate this Contract. In the event of termination at this Contract for any reason, HOMEOWNER shall pay Contractor for all work performed through the date of termination, ALL costs relating to restocking charges in the amount of 20% for materials ordered and NOT yet installed, attorneys' fees AND collections costs AND (unless termination is due to a material breach of Contractor) anticipated profit. In no event shall Contractor's liability under this Contract exceed the amount of the Contracted Sum. Except as otherwise expressly permitted in this paragraph, the parties hereto waive all rights to consequential damages arising out of a breach of this Contract. The work performed by Contractor under this Contract, if related to a residence, is subject to the Wisconsin "Right To Cure Law" and, accordingly, Contractor hereby provides the following statutory notice (in which "you" and "your" refers to "Owner"): **WISCONSIN LAW CONTAINS IMPORTANT REQUIREMENTS YOU MUST FOLLOW BEFORE YOU MAY FILE A LAWSUIT FOR DEFECTIVE CONSTRUCTION AGAINST THE CONTRACTOR WHO COMPLETED YOUR REMODELING PROJECT OR AGAINST WINDOW OR DOOR SUPPLIERS. FOR EXAMPLE, SECTION 895.07(2) AND (3) OF THE WISCONSIN STATUTES REQUIRES YOU TO DELIVER TO THE CONTRACTOR A WRITTEN NOTICE OF ANY CONSTRUCTION CONDITIONS THAT YOU ALLEGE ARE DEFECTIVE BEFORE YOU FILE YOUR LAWSUIT, AND YOU MUST PROVIDE CONTRACTOR THE OPPORTUNITY TO MAKE AN OFFER TO REPAIR OR PAY FOR THE CONSTRUCTION DEFECTS. YOU ARE NOT OBLIGATED TO ACCEPT ANY OFFER MADE BY THE CONTRACTOR, BUT FAILURE TO ACCEPT A REASONABLE OFFER MAY LIMIT YOUR RECOVERABLE DAMAGES. ALL PARTIES ARE BOUND BY APPLICABLE WARRANTY PROVISIONS.**
- **BE HEINS CONTRACTING, LLC** has not investigated for the presence of asbestos or lead-based paint at the subject property. **BE HEINS CONTRACTING, LLC** discloses that remodeling activities can disrupt or dislodge asbestos or lead-based paint and that construction projects where moisture or dampness are present can result in the development of mold or other hazardous conditions. **BE HEINS CONTRACTING, LLC** (and its employees and sub-contractors) are not certified or trained for removal of any toxic or hazardous substances. **BE HEINS CONTRACTING, LLC** has not tested or inspected for the presence of any such materials and disclaims any obligation or responsibility to test for such materials at any time.

---

Company Authorized Signature

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Date

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Customer Signature

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Date

---

Customer Signature

---

Date



07/21/2020

**Heins Contracting**  
1930 s stoughton rd  
Madison, WI 53716  
Phone: (608) 732-9063

**Company Representative**  
Derek Popp  
Phone: (608) 553-1879  
derek@heinscontracting.com

**Chris Stewart**  
5407 McKenna Road  
Monona, WI 53716 (608) 220-4113

Job: Chris Stewart

### Siding Section

- Remove existing siding
- Install new House wrap
- Tape House wrap seams
- Install new Vinyl accessories as needed
- Install new Vinyl siding
- Install new aluminum flashing's
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Heins Contracting warrants all siding labor work for 10 years.

Heins Contracting to pull all needed permits.

\*\*Payment in full upon substantial completion.\*\*

---

**\$9,850.00**

### Purchaser(s) Acknowledge(s):

- Purchaser(s) acknowledge receipt of a true copy of this contract, acknowledges they have read and know the contents and understands that no other agreements verbal or otherwise are binding on the parties there to and that same contains to the entire contract.
  
- Purchaser(s) agree(s) to pay **BE HEINS CONTRACTING, LLC** or its assigns the unpaid balance due on substantial completion to be paid upon all terms and conditions set forth herein including any necessary signatures on documents that may be requested by finance source or assigns to secure this transaction
  
- **NOTICE OF LIEN RIGHTS:** AS REQUIRED BY THE WISCONSIN CONSTRUCTION LIEN LAW, **BE HEINS CONTRACTING, LLC**, HEREBY NOTIFIES OWNER THAT PERSONS OR COMPANIES FURNISHING LABOR OR MATERIALS FOR THE CONSTRUCTION ON OWNERS LAND MAY HAVE LIEN RIGHTS ON OWNER'S LAND AND BUILDING IF NOT PAID. THOSE ENTITLED TO LIEN RIGHTS, IN ADDITION TO **BE HEINS CONTRACTING, LLC** ARE THOSE WHO CONTRACT DIRECTLY WITH THE OWNER OR THOSE WHO GIVE THE OWNER NOTICE WITHIN 60 DAYS AFTER THEY FIRST FURNISH LABOR OR MATERIALS FOR THE CONSTRUCTION, ACCORDINGLY, OWNER PROBABLY RECEIVE

NOTICES FROM THOSE WHO FURNISH LABOR OR MATERIALS FOR THE CONSTRUCTION, AND SHOULD HAVE A COPY OF EACH NOTICE RECEIVED TO THEIR MORTGAGE LENDER, IF ANY. **BE HEINS CONTRACTING, LLC** AGREES TO COOPERATE WITH THE OWNER AND THEIR LENDER, IF ANY. TO SEE WHAT ALL POTENTIAL LIEN CLAIMANTS ARE DULY PAID.

- **ADDITIONAL WORK:** All additional work not found on initial inspection by **BE HEINS CONTRACTING, LLC** will be added as a change order upon homeowners request.
- **SELLER'S LIMITED WARRANTY:** Is as specified and will transfer to the Purchaser all manufacturer's written warranties. **BE HEINS CONTRACTING, LLC** specifically excludes from warranty coverage and accepts no responsibility for: 1.) defects in appliances and equipment covered by manufacturers warranties; 2.) items not installed by **BE HEINS CONTRACTING, LLC** or its sub-contractors or provided by their material suppliers; 3.) special incidental or consequential damages of any sort, such as lighting, gale force winds, tornado, ice dams (thawing and refreezing of ice, water or snow) or any other damage on or below the roof line due to leaks by excessive snow or win-driven rain, ice or hail or other such manufacturer's warranties are available. **BE HEINS CONTRACTING, LLC** shall provide to Purchaser documentation of all manufacturer's warranties for materials or equipment provided hereunder, to the extent that such manufacturer's warranties are available. **BE HEINS CONTRACTING, LLC SHALL HAVE NO OBLIGATION TO ISSUE WARRANTY WORK UNLESS AND UNTIL FINAL PAYMENT HAS BEEN MADE IN FULL.**
- **ALL SURPLUS MATERIALS** are the property of **BE HEINS CONTRACTING, LLC**. All materials delivered/ordered by **BE HEINS CONTRACTING, LLC** to the Purchaser's premises shall be stored and safely kept by the Purchaser's and no rental or storage charges therefore shall be made or assessed by Purchaser's. Purchaser will supply electricity to perform all necessary work.
- **BE HEINS CONTRACTING, LLC** will purchase all necessary building permits; perform all work in a workmanlike manner and in accordance with local building specifications.
- **ALL** payments will be made to **BE HEINS CONTRACTING, LLC**. **ALL** estimates/contracts will be cash based. **IF** using **credit/debit card** as payment method this **MUST** be stated before signing of contract. Contract amount is subject to change if payment method is approved (Interest rates vary per contract amount and type of card used). **BE HEINS CONTRACTING, LLC** has the right to charge a minimum of \$35 for any returned check in addition to amount due. Financing is available to those who qualify. Interest rate may vary.
- During the duration of the work, the client(s) homeowners insurance will be responsible for any interior damage as long as **BE HEINS CONTRACTING, LLC** has taken appropriate action to protect the roof or siding during the repairs.
- **BE HEINS CONTRACTING, LLC** reserves the right to revoke the proposal 90 days from date accepted if materials are not available. After 90 days **BE HEINS CONTRACTING, LLC** reserves the right to adjust contract if material prices increase.
- Any representations, statements, or other communications not written on this agreement are agreed to be immaterial, and not relied on by either party, and do not survive the execution of this contract.
- **FAILURE TO PAY:** If the Purchaser fails to make payments as provided herein, after ten (10) days written notice, **BE HEINS CONTRACTING, LLC** may remove all materials installed pursuant to this contract. **BE HEINS CONTRACTING, LLC** shall not be liable in any way to the Purchaser for the removal of those materials.
- **SIGNING OF DOCUMENTS:** If the contract price is to be financed with a lending institution, the Purchaser agrees to sign any and all required documents, including but not limited to any credit application, not a deed of trust. The act of signing shall be done on the lending institution's contract documents and forms. These documents and forms shall merge with and become a part of this contract as though more fully shown on the face thereof.
- **Uncontrollable Delay:** **BE HEINS CONTRACTING, LLC** is not responsible for delay or inability to perform caused by strikes, acts of God, riots, shortages, weather conditions, public authorities or other causes or casualties beyond his control, or due to the Purchaser's conduct.
- **HIDDEN CONDITIONS / UTILITIES:** Contractor has prepared its estimate of the Contract Sum without knowledge of any preexisting deficiencies or defects in the building not apparent from a visual inspection of the building. If any such conditions, including without limitation, nail pops,

existence of plumbing vent pipes, wood rot, or decking deflection become evident to Contractor after commencement of the work, Contractor shall adjust the Contract Sum for the cost of time and materials accordingly. If owner has knowledge of or suspects such conditions, Owner shall advise Contractor of such conditions prior to Contractor's commencement of the work, so that Contractor can provide Owner with the best possible estimate to the Contract Sum. Contractor shall not be liable for damage to stucco, brick, siding and any reset items such as chipping or breaking the stucco and brick and denting and scratching of siding or windows. Such damage frequently occurs, especially with respect to very steep roofs or where there are rotted or rusted areas. Contractor shall have no liability with respect to any solar panels, satellite dishes or weather instruments located on the building. Owner agrees to coordinate and work to be performed around such solar panels, and weather instruments with a contractor qualified in the repair and/or installation of such devices. Owner agrees to remove or cover all furniture and flooring located under a skylight. Owner shall pay for any utilities used during construction, including electricity. Owner expressly permits Contractor to include photographs, depictions, information or representations regarding the work in Contractor's sales or marketing materials and Contractor may place temporary advertising/marketing signage on the property during the construction of the work.

- **EXPECTATIONS:** The work will cause inconveniences and annoyances. Contractor shall remove debris related to the work and leave the property in a condition reasonably acceptable to Owner.
- **DEFAULT; RIGHT TO CURE LAW:** This Contract may not be terminated without the consent of both parties, except as expressly set forth in this Contract. If the work shall be stopped for a period in excess of 10 consecutive days by the order of Owner, any court or other public authority, Contractor may terminate this Contract. In the event of termination at this Contract for any reason, Owner shall pay Contractor for all work performed through the date of termination, all costs relating to restocking charges in the amount of 20% for materials ordered and not yet installed, attorneys' fees and collections costs and (unless termination is due to a material breach of Contractor) anticipated profit. In no event shall Contractor's liability under this Contract exceed the amount of the Contracted Sum. Except as otherwise expressly permitted in this paragraph, the parties hereto waive all rights to consequential damages arising out of a breach of this Contract. The work performed by Contractor under this Contract, if related to a residence, is subject to the Wisconsin "Right To Cure Law" and, accordingly, Contractor hereby provides the following statutory notice (in which "you" and "your" refers to "Owner"): **WISCONSIN LAW CONTAINS IMPORTANT REQUIREMENTS YOU MUST FOLLOW BEFORE YOU MAY FILE A LAWSUIT FOR DEFECTIVE CONSTRUCTION AGAINST THE CONTRACTOR WHO COMPLETED YOUR REMODELING PROJECT OR AGAINST WINDOW OR DOOR SUPPLIERS. FOR EXAMPLE, SECTION 895.07(2) AND (3) OF THE WISCONSIN STATUTES REQUIRES YOU TO DELIVER TO THE CONTRACTOR A WRITTEN NOTICE OF ANY CONSTRUCTION CONDITIONS THAT YOU ALLEGE ARE DEFECTIVE BEFORE YOU FILE YOUR LAWSUIT, AND YOU MUST PROVIDE CONTRACTOR THE OPPORTUNITY TO MAKE AN OFFER TO REPAIR OR PAY FOR THE CONSTRUCTION DEFECTS. YOU ARE NOT OBLIGATED TO ACCEPT ANY OFFER MADE BY THE CONTRACTOR, BUT FAILURE TO ACCEPT A REASONABLE OFFER MAY LIMIT YOUR RECOVERABLE DAMAGES. ALL PARTIES ARE BOUND BY APPLICABLE WARRANTY PROVISIONS.**
- **BE HEINS CONTRACTING, LLC** has not investigated for the presence of asbestos or lead-based paint at the subject property. **BE HEINS CONTRACTING, LLC** discloses that remodeling activities can disrupt or dislodge asbestos or lead-based paint and that construction projects where moisture or dampness are present can result in the development of mold or other hazardous conditions. **BE HEINS CONTRACTING, LLC** (and its employees and sub-contractors) are not certified or trained for removal of any toxic or hazardous substances. **BE HEINS CONTRACTING, LLC** has not tested or inspected for the presence of any such materials and disclaims any obligation or responsibility to test for such materials at any time.

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Company Authorized Signature

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Date

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Customer Signature

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Date

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Customer Signature

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Date



# Agreement

## Prepared for:

Chris Stewart  
5407 McKenna Rd.  
Monona, Wisconsin 53716  
(608)220-4113 / fordfrogger89@yahoo.com



4125 Terminal Dr Ste 120  
Mc Farland, Wisconsin 53558



Date	Agreement
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07/21/2020

4017

Sales Rep
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Brock Roder

Phone:

Email: broder@legacy-exteriors.com

Legacy Exteriors LLC  
 4125 Terminal Dr Ste 120  
 Mc Farland, Wisconsin 53558  
 Phone: 608/8383111

## Agreement

Chris Stewart  
 5407 McKenna Rd.  
 Monona, Wisconsin 53716  
 (608)220-4113 / fordfrogger89@yahoo.com

### Included

Product	Description	Quantity	Unit	Unit Price	Ext. Price
Siding Mastic Lap Siding Carvedwood Double 4" deep Misty Shadow	 Carvedwood is an ideal choice for remodelers because of its optimal thickness and wide selection of designer-inspired colors.	26	sq	\$225.00	\$5,850.00
Siding Siding Accessories Labor On/Off (SQ)	 Tear off and install House and garage	26	sq	\$220.00	\$5,720.00
Siding Siding Accessories Install Vapor Barrier Tyvek House Wrap	 Supply and install tyvek and tape the seams	26	sq	\$65.00	\$1,690.00
Siding Siding Accessories J Block	 4	4	ea	\$10.49	\$41.96
Siding Siding Accessories Light blocks	 3	3	ea	\$9.39	\$28.17
Siding Siding Accessories Dryer Vents	 1	1	ea	\$13.39	\$13.39
Siding Siding Accessories 2" Siding Nails	 1	1	ea	\$42.80	\$42.80

Roofing Roofing Accessories Hardware/Materials Plywood OSB 7/16 Decking 4x4x8		Sheathing panels that provide dimensional stability and stiffness for roof sheathing needs Engineered wood product with smooth surface; no core voids, knots or splits.	0	ea	\$60.00	\$0.00
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If we find rotten or deteriorated wood, there will be an additional charge of \$60 per sheet or \$10 per Lineal Foot.

Roofing Roofing Accessories Dump			1	ea	\$250.00	\$250.00
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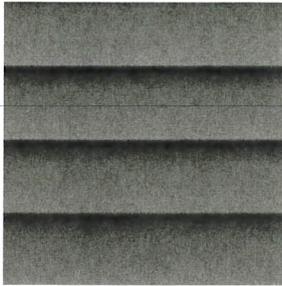
Roofing Roofing Accessories Permit			1	ea	\$166.67	\$166.67
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**Total** \$13,802.99  
**Down Payment (50%)** \$6,901.50  
**Final Payment (50%)** \$6,901.49

# Product Images - Included

Below is a listing of photos for the products selected.

Siding Mastic Lap Siding Carvedwood Double 4" deep Misty Shadow



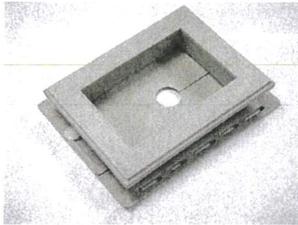
Siding Siding Accessories Labor On/Off (SQ)



Siding Siding Accessories Install Vapor Barrier Tyvek House Wrap



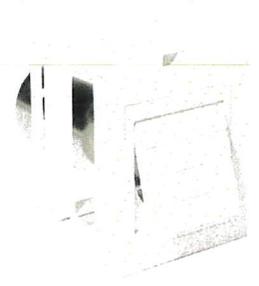
Siding Siding Accessories J Block



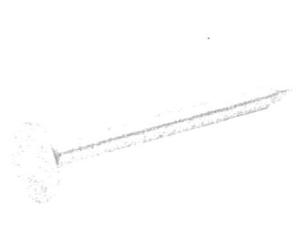
Siding Siding Accessories Light blocks



Siding Siding Accessories Dryer Vents



Siding Siding Accessories 2" Siding Nails



Roofing Roofing Accessories Hardware/Materials Plywood OSB 7/16 Decking 4x4x8



Roofing Roofing Accessories Dump



Roofing Roofing Accessories Permit



# Job Photos







# HOME IMPROVEMENT CONTRACT

**1. CONTRACT TERMS** - The Parties agree to the following terms subject to Section 3 through Section 16 of the Contract. The **“Contract”** is entered into by and between the Builder and the Owner set forth on this Cover Page. The Builder and the Owner may be referred to herein as individually a **“Party”** and collectively the **“Parties.”**

**2.** In consideration of the mutual covenants and obligations set forth herein, this Home Improvement Contract and the attached Addendum to Home Improvement Contract and any exhibits referenced herein (together,

## **3. CONTRACT PRICE**

Owner agrees to pay Builder the lump sum price set forth in the contract for the completion of the Work (the **“Contract Price”**).

## **4. WORK**

Subject to the terms and conditions of this Contract, Builder shall provide the labor, materials, equipment, and services necessary to complete the construction of the project consistent with the described Work set forth in the contract and any attached plans and/or specifications (the **“Work”**). Slight, non-material deviations from the set forth description and the plans and specifications shall be construed as substantial compliance with this Contract.

## **5. START DATE / COMPLETION DATE**

**A. Start Date** Unless the parties mutually agree otherwise, Builder shall commence the Work on the Start Date set forth in the contract. Builder shall not be required to commence working on the Start Date unless the following preconditions have been met: (i) execution of this Contract; and (ii) payment of the Initial Payment.

**B. Completion Date** At a reasonable, agreed to time after the Builder has completed the Work, Builder and Owner shall conduct a **“Walk-Through”** to inspect the Work to determine that the Builder completed the Work, and that there are no Construction Defects. If there is any unfinished Work and/or there are any Construction Defects, Builder shall complete the Work and/or cure the Construction Defects within a reasonable amount of time. The **“Completion Date”** shall be the later date of either the Walk-Through or the completion of or curing of any unfinished Work or Construction Defects identified at the Walk-Through. The Completion Date shall be no later than 90 days unless a new date is required due to any Delays as provided for under Section 4.

**C. Delays** Builder shall give Owner timely notice of any impending delay in performance of the Contract in the form of a written Change Order if performance will be delayed beyond a deadline specified in the Contract. The notice must specify the reasons for the delay, and shall specify new proposed Start Date and/or Completion Date. Owner shall sign any reasonable request for delay in the performance of the Contract.

## **6. CONSTRUCTION PAYMENTS**

**A. Initial Payment** Owner agrees to make an initial payment to Builder to pay a portion of the initial costs of design, permitting, labor and materials in the amount set forth in the contract (the **“Initial Payment”**) prior to the Start Date.

**B. Progress Payments** Owner shall make progress payments as set forth in the contract (each a **“Payment Period”**).

**C. Final Payment** The final payment (the **“Final Payment”**) shall be paid at the Completion Date.

**D. Lien Waivers** Builder shall furnish lien waivers (partial and final as required) from all contractors, subcontractors and material suppliers for the proportionate value of all labor, services and products or materials furnished or delivered as of the time payment is made. Each lien waiver from Builder shall be limited to the actual amount of payment in good funds, and shall be conditioned upon Owner’s payment of the progress payment to Builder or other party. Any lien waiver provided by Builder to Owner shall automatically be null and void if payment in good funds is not received within three (3) business days.

## **7. PERMITS**

Builder hereby informs Owner that all of the building and/or construction permits that are required for the Work are set forth in The contract. Builder will not start work under this Contract until all required state and local permits have been issued.

## **8. CHANGES TO THE WORK (CHANGE ORDERS)**

After execution of this Contract, any changes to the Work shall be accomplished by the written agreement of Builder and Owner pursuant to a change order (each a **“Change Order”**). Each written Change Order shall be signed by the Builder and Owner and shall set forth the Change in the Work, adjustments to the Contract Price and the adjustment to the Completion Date.

## **9. INSURANCE**

The Builder maintains Commercial General Liability and Worker’s Compensation insurance as required by the State of Wisconsin under its Dwelling Contractor Certification. The Owner shall obtain or maintain liability insurance for the Project Site.

## **10. WARRANTY**

**A. Warranty** Builder warrants that the Work shall be free from Construction Defects for a period of one (1) year from the Completion Date subject to the limitations set forth below (the **“Warranty”**).

**B. Construction Defects** A **“Construction Defect”** means a deficiency or omission in the completion of the Work that results from defective materials, a violation of applicable building codes or a failure to follow the current adopted standards set forth in the Construction Industry Quality Standards of the Wisconsin Builders Association. Any damage, deficiency, omission or defect in the completion of the Work caused, in whole or in part by: (i) Owner’s improper or insufficient maintenance of the work or improper or insufficient maintenance or operation of any of the systems included in the Work; (ii) natural occurrences beyond Builder’s control; (iii) defects in materials supplied by anyone other than the Builder or agents acting on the Builder’s behalf; (iv) any work performed by Owner or Owner’s contractors, subcontractors or agents; (v) normal wear and tear and normal usage; and (vi) materials, products or systems covered by other warranties such as manufacturers’ warranties shall not be considered Construction Defects and in such cases the Builder shall not be obligated to

replace or repair any damage, deficiency, or defect or pay for the replacement or repair of any damage or deficiency in the Work. Builder's Warranty is not assignable or transferable without the Builder's prior written consent.

**C. Notice and Repair/Replacement of Construction Defect** For a Construction Defect to be covered by this Warranty, Owner shall give written notice of the Construction Defect (the "**Notice**") to Builder prior to the date of expiration of this Warranty. Upon receipt of the Notice from Owner, the Builder shall either replace or repair the Construction Defect, at Builder's sole discretion, within fourteen (14) days after receipt of the Notice unless such repair or replacement cannot be completed within that time period. In those cases where Builder cannot complete the repair or replacement of the warranted work within fourteen (14) days, Builder shall complete such repair or replacement in a reasonably prompt manner. Any Construction Defect, latent or otherwise, for which Notice is not provided prior to the expiration of this Warranty, shall not be covered by this Warranty. If Owner does not give Builder Notice of the Construction Defect and the opportunity to either repair or replace the Construction Defect, at Builder's sole discretion, then the Builder shall not be liable for the Construction Defect.

**D. Other Warranties** Builder hereby assigns to Owner any and all manufacturers' warranties pertaining to any fixtures, appliances and equipment and other products covered by a manufacturer's warranty that are part of the Project (collectively, the "**Warranted Products**"). In the event Builder repairs, replaces or pays the cost of repairing or replacing any defect covered by this Warranty which is covered by other insurance or other warranties, then Owner shall assign the proceeds of such insurance or warranties to Builder to the extent of the cost to the Builder for such repair or replacement, or the extent of the payment. ***Builder shall provide any manufacturer's product warranty to Owner at the time the product is installed.***

**F. Claims Relating To Construction Defects** To the extent allowed by law, this Warranty shall be the exclusive remedy for all claims relating to Construction Defects.

## **11. NOTICE OF LIEN**

**AS REQUIRED BY THE WISCONSIN CONSTRUCTION LIEN LAW, BUILDER HEREBY NOTIFIES OWNER THAT PERSONS OR COMPANIES PERFORMING, FURNISHING OR PROCURING LABOR, SERVICES, MATERIALS, PLANS, OR SPECIFICATIONS FOR THE CONSTRUCTION ON OWNER'S LAND MAY HAVE LIEN RIGHTS ON OWNER'S LAND AND BUILDINGS IF NOT PAID. THOSE ENTITLED TO LIEN RIGHTS, IN ADDITION TO THE BUILDER, ARE THOSE WHO CONTRACT DIRECTLY WITH THE OWNER OR THOSE WHO GIVE THE OWNER**

**NOTICE WITHIN 60 DAYS AFTER THEY FIRST PERFORM, FURNISH, OR PROCURE LABOR, SERVICES, MATERIALS, PLANS, OR SPECIFICATIONS FOR THE CONSTRUCTION. ACCORDINGLY, OWNER PROBABLY WILL RECEIVE NOTICES FROM THOSE WHO PERFORM, FURNISH, OR PROCURE LABOR, SERVICES, MATERIALS, OR SPECIFICATIONS FOR THE CONSTRUCTION, AND SHOULD GIVE A COPY OF EACH NOTICE RECEIVED TO THE MORTGAGE LENDER, IF ANY. CLAIMANT AGREES TO COOPERATE WITH THE OWNER AND THE OWNER'S LENDER, IF ANY, TO SEE THAT ALL POTENTIAL LIEN CLAIMANTS ARE DULY PAID.**

## **12. LATE PAYMENT**

All sums due and owing more than fifteen (15) days from the due date shall bear interest at an annual rate of twelve percent (12%). Builder shall have the right to collect amounts due hereunder pursuant to all remedies available by law. To the extent not prohibited by law, Owner shall pay all reasonable costs and expenses of collection, including without limitation, reasonable, actual attorneys' fees and other legal expenses, incurred by the Builder in collecting the amounts due hereunder.

**13. ATTORNEY FEES** In the event that arbitration or litigation is commenced by either Party to this Contract, the non-prevailing Party shall reimburse the prevailing party for any and all costs, including without limitation, reasonable, actual attorneys' fees and disbursements. For purposes of this section, the term "**Prevailing Party**" means a party who succeeds on any significant issue which provides a significant benefit to that Party in such arbitration or litigation.

## **14. ASSIGNMENT**

Builder may assign the Contract, in whole or in part, without Owner's consent, and Builder's assignee shall be entitled in full to the assigned rights under the Contract.

## **15. SIGNATURES**

The signature of either Owner (if more than one) subsequent to the signing of this Contract shall be sufficient for all purposes under the Contract, including without limitation Change Orders, if any.

## **16. FINAL AGREEMENT**

This Contract expresses all agreements between the parties concerning the subject matter hereof and supersedes all previous agreements, communications or understandings relating thereto, whether oral or written, including proposals, draft plans and specifications, brochures and other information.

## ADDENDUM TO HOME IMPROVEMENT CONTRACT

This ADDENDUM TO HOME IMPROVEMENT CONTRACT (this "Addendum") is made part of that certain Home Improvement Contract (the "Form" and together with this Addendum, the "Contract") by and between Legacy Exteriors LLC ("Builder") and \_\_\_\_\_ ("Owner"). If there are any inconsistencies between the terms of this Addendum and the terms set forth in the Form, the terms of this Addendum shall control. Builder and Owner set further agree as follows:

1. Delay; Unknown Conditions. In no event shall Builder be responsible or liable for any failure or delay in the performance of its obligations hereunder arising out of or caused by, directly or indirectly, forces beyond its control, including, without limitation, strikes, work stoppages, accidents, acts of war or terrorism, natural catastrophes or acts of God, delays due to municipal restrictions, Owner's inability to obtain financing, or other events resulting in delays in performance of this Contract ("Events"). Events shall not constitute abandonment and are not included in calculating time frames for performance by Builder.
2. Early Cancellation. In the event Builder determines that this Contract cannot be performed as intended due to unforeseen circumstances, including but not limited to incorrect pricing, unforeseen structural defects or pre-existing conditions to Owner's property, Builder may cancel this Contract with written notice to Owner of such cancellation, return all monies paid by Owner, and, in Builder's sole discretion, agree to additional charges. Owner may cancel this Contract without additional fees with written notice to Builder within three (3) calendar days of the Start Date ("Early Termination Deadline"). Owner may cancel this Contract after the Early Termination Deadline with Builder's consent, and Owner shall be subject to a late cancellation fee equal to 15% of the Contract Price.
3. Right to Cure. Sections 895.07(2) and (3) of the Wisconsin Statutes require Owner to deliver to Builder a written notice of any construction conditions Owner alleges are defective before filing a lawsuit for defective construction against Builder. Owner must provide Builder the opportunity to make an offer to repair or remedy the alleged construction defects. Owner is not obligated to accept any offer made by Builder. All parties are bound by applicable warranty provisions.
4. Default. If the Owner is in default of this Contract, Owner agrees to pay Builder's attorneys' fees up to 15% of the defaulted amount or as otherwise allowed by applicable law (the "Default Fee"). In addition to the Default Fee, Owner agrees to pay any other costs or expenses of repossession, collection or realization on any security, including but not limited to court costs, to the extent not prohibited by applicable laws.
5. Owner's Representations. Owner represents and warrants the following: (A) credit information furnished by Owner in connection with this transaction is true and complete; (B) no person has promised or offered to pay or credit Owner any compensation or regard for the procurement of a contract with others as an inducement to enter into the Contract; (C) no person has offered, delivered, paid credit, or allowed Owner any gift, bonus, award money merchandise, trading stamps, or cash loan as an inducement to entering into this Contract; (D) Owner is the owner of the property where the goods and services are being provided.

6. Arbitration of Disputes. Any disputes arising under the Contract shall be promptly submitted to and heard in Dane County, Wisconsin and at the sole discretion of Builder, determined by arbitration. The determination of the arbitrator shall be binding on parties, shall not be appealable, and judgment on the award rendered may be entered in any court having jurisdiction on the matter, the prevailing party (as determined by arbitrator) shall be entitled to recover from the other party all costs and expenses (including but not limited to attorney fees) incurred in enforcing its rights under the arbitration process, both Owner and Builder are hereby agreeing to choose arbitration rather than litigation or some other means of dispute resolution to address the grievances or alleged grievances. The parties hope this will allow their grievances to be resolved in a faster and more cost-effective manner than litigation, by entering into this Contract and this arbitration provision, both parties are giving up their constitutional right to have any dispute decided in a court of law before a jury and instead are accepting the use of arbitration as set forth immediately before. Notwithstanding anything herein to the contrary, Builder retains the option to use judicial relief to enforce a security instrument or the monetary obligation represented by this Contract. Such judicial relief in a court shall not constitute a waiver of the right of any party to compel arbitration of any other dispute or remedy subject to arbitration in this Contract, including the filing of a counterclaim by Owner in a suit brought by Builder pursuant to these arbitration provisions.
7. Governing Law. The Contract shall be governed and controlled by the laws of the state of Wisconsin as to interpretation, enforcement, validity, construction, effect, and in all other respects, parties consent to venue in Dane County, Wisconsin.
8. Severability. If any provision of the Contract is held to be invalid or unenforceable, it shall be ineffective only to the extent of the invalidity and enforceability of the remainder of the provisions or the remaining provision of the Contract.
9. Additional Work. All Work that is not part of this Contract will be charged at an hourly rate per man hour as stated by Builder. If not stated by Builder, the hourly rate shall be \$100 per man hour.

**ACCEPTED**

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

\_\_\_\_\_  
Legacy Exteriors Representative

\_\_\_\_\_  
Owner/Owners Representative Signature

**Project:** Request for Renew Monona Loan Funds  
**Project Address:** 4913 McKenna Road  
**Applicant:** Rick Bernstein

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**Proposal Summary:**

Mr. Rick Bernstein (the "Applicant") owns the property at 4913 McKenna Road (the "Property"), and has submitted a Renew Monona Loan application requesting \$7,147.00 for the Home Improvement category (the "Application") to conduct the following improvements on the existing residence (the "Project"):

- Installation of solar panels on the roof of the detached garage.
- Upgrade electrical panel.

Per the Application, the proposed total cost of improvements is \$14,294.00 with the loan request of \$7,147.00. The Applicant provided cost estimates for the proposed solar panels and electrical upgrades, which are included as Attachments 4 and 5.

Mr. Bernstein had been previously approved for a Renew Monona loan of \$6,672.00 for the solar panel project in May 2020, but requested that funds be held, so as he received additional information on the cost of the solar panels. He indicated to staff that he indicated to resubmit a new request that reflected the increase cost of the solar panels. The new Renew Monona loan request is \$7,147.00 (up from the previous approved \$6,672.00).

**Staff Review of Eligibility Criteria:**

	<b>Criteria</b>	<b>Criteria Met</b>	<b>Notes</b>
1	Property is owner-occupied	Yes	Mr. Bernstein currently resides at the residence and purchased it in 1995.
2	Assessed Property Value	Yes	Total Assessed Value (TAV) of \$244,200.00 as of 1/1/2020.
3	Assessed Property Value less than or equal to 120% of Median Sold Home Price	Yes	TAV of \$244,200.00 is less than the 120% of the median assessed value of residential properties of \$358,200.00 as of 01/01/2020.
4	Applicant to maintain at residence for at least 2 Years after Project	Yes	Mr. Bernstein indicated that he will remain at the residence for at least 2 years after the improvements are completed.
5	Proposed Improvements are to Primary Structure	Yes	Improvements are to the detached two car garage

			which is eligible according to City documentation.
5	Proposed improvements are eligible uses of Program Loan Funds	Yes	Solar panels are an eligible use under Home System Upgrade.
6	Proposed improvements will increase the assessed value of the home.	Yes	Solar panels will increase the energy efficiency and overall performance of the home.
7	Proposed improvements will improve the attractiveness of the home and the neighborhood to potential future home buyers.	Yes	The proposed improvements enhance the energy efficiency of the home and offer lasting marketability to 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 allowed Staff to contact their financial institution to check that are in good financial standing.

	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.	The installation of solar panels is an approved Home System Upgrade under the Renewable Energy Technology category.
B	Improvements are long-lasting and will enhance the quality of the home for years to come.	The panels have a predicted useful life of 30 years with limited visual impact.
C	Proposed improvements will increase the energy efficiency of the home.	The installation of solar panels to the property will provide a source of renewable energy to the property.
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 50% portion of the Project (\$7,147.00), assuming that CDA approves the full loan amount. The Applicant has not started work on the project, and will wait until a decision has been made by the CDA.

**Recommendation:**

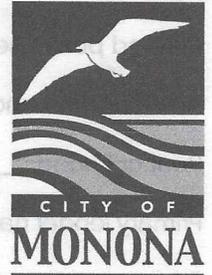
Staff recommends CDA review and discussion of the application materials and make a recommendation on what, if any, loan amount should be provided for this Project.

**Attachments:**

- Attachment 1 – Mr. Rick Bernstein’s Renew Monona Application Form (**DOES NOT REFLECT UPDATED LOAN REQUEST**)
- Attachment 2 - Map of 4913 McKenna Road (from Dane County Property Information)

- Attachment 3 - Parcel Records for 4913 McKenna Road (from Dane County Property Information)
- Attachment 4 – Submitted Cost Estimate for Solar Panel Installation and Electrical Upgrades
- Attachment 5 – Submitted Cost Estimate for Additional Electrical Panel Upgrades

# 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: Richard A Bernstein  
Address: 4913 McKenna Road Phone: 608 251 4615  
Name of Employer: Retired Contact Person: \_\_\_\_\_  
Employer Address: \_\_\_\_\_  
Employer Phone: \_\_\_\_\_ Number of years at this job: 29

## Co-Applicant Information:

Name of Co-Applicant: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_  
Name of Employer: \_\_\_\_\_ Contact Person: \_\_\_\_\_  
Employer Address: \_\_\_\_\_  
Employer Phone: \_\_\_\_\_ Number of years at this job: \_\_\_\_\_

## Other Information:

Household size: 4 How long have you lived at your current residence? 7  
Do you rent or own your current residence?  Rent  Own  
Have you purchased a home before? yes  
If yes, how long ago?: 25 years ago

## Property Being Purchased or Where Improvements will be Made:

Property Address: 4913 McKenna Road  
Number of bedrooms: 4 Age of home: 69  
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
*	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.
	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	

*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:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Professional cost estimate attached.

Total Cost of Improvements: \$ 13,344

Amount of Loan You Are Seeking: \* \$ 6,672

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

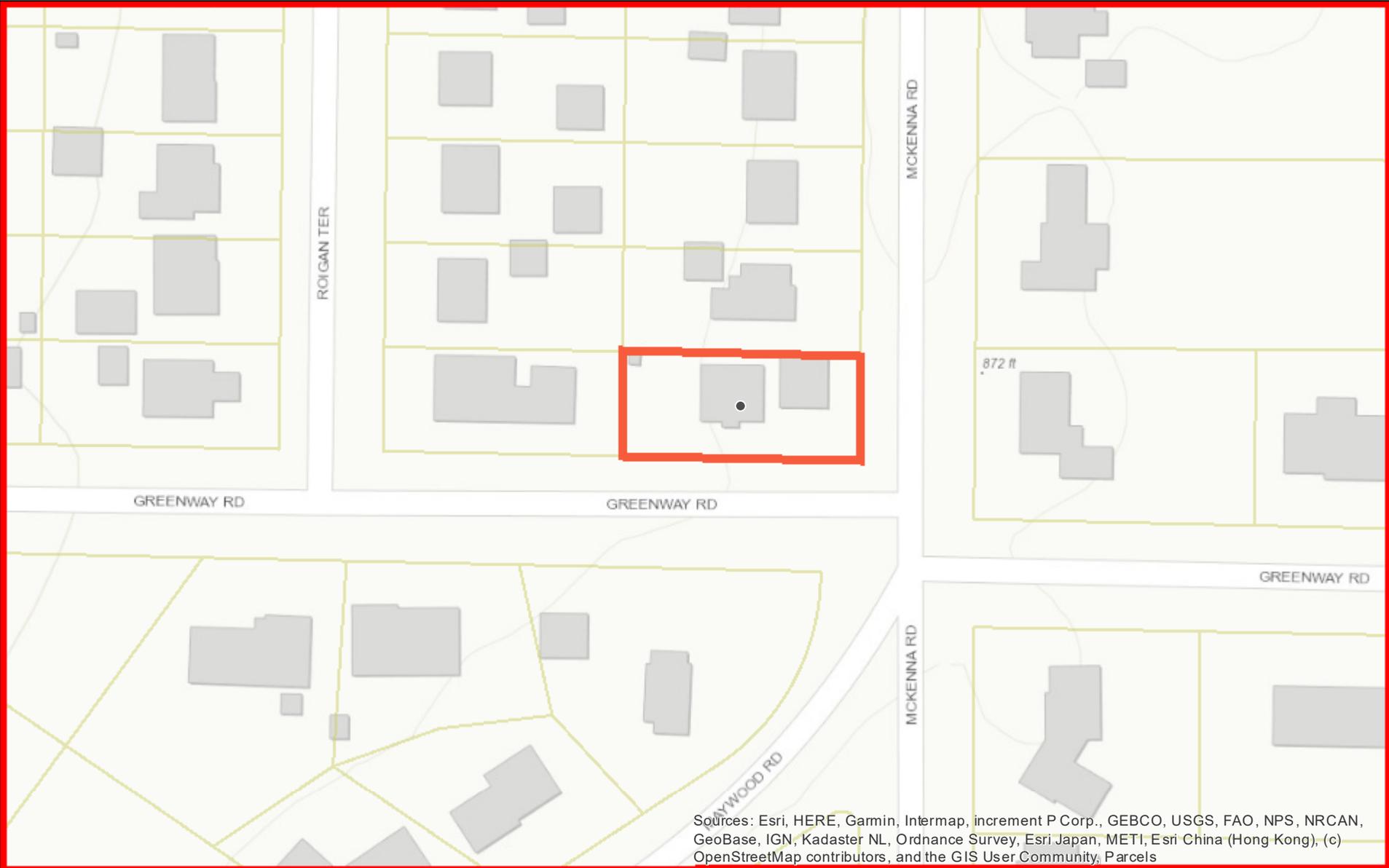
**Certification:** I hereby certify that to the best of my knowledge and belief, the content of the application is true and correct. I/we consent to the disclosure of such information for purposes of income and verification related to my/our application for financial assistance. I/we understand that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

Signature of applicant: Richard A. Bennteen Date: 5/15/2020

Signature of co-applicant: \_\_\_\_\_ Date: \_\_\_\_\_

For internal use only

# 4913 McKenna Rd



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), (c) OpenStreetMap contributors, and the GIS User Community, Parcels

April 6, 2020

Parcels

0 50 100 200 Feet



**Parcel Number -  
258/0710-173-0210-3**

**Current**

**Summary Report**

[← Parcel  
Parents](#)

**Parcel Summary** [More +](#)

Municipality Name	CITY OF MONONA
Parcel Description	WINNEQUAH TERRACE LOT 20
Owner Names	
Primary Address	4913 MCKENNA RD
Billing Address	4913 MCKENNA RD MONONA WI 53716

**Assessment Summary** [More +](#)

Assessment Year	2019
Valuation Classification	G1
Assessment Acres	0.189
Land Value	\$57,500.00
Improved Value	\$186,700.00
Total Value	\$244,200.00

[Show Valuation Breakout](#)

[Show Assessment Contact Information ▼](#)

**Zoning Information**

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

**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

**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
\$57,500.00	\$186,700.00	\$244,200.00
<b>Taxes:</b>		\$5,306.33
<b>Lottery Credit(-):</b>		\$258.99
<b>First Dollar Credit(-):</b>		\$93.34
<b>Specials(+):</b>		\$0.00
<b>Amount:</b>		\$4,954.00
<a href="#">2019 Tax Info Details</a>		<a href="#">Tax Payment History</a>

### Recorded Documents

Doc. Type	Date Recorded	Doc. Number	Volume	Page
WD	04/17/2013	4979579		

Show More ▼

### DocLink

DocLink is a feature that connects this property to recorded documents. 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.

By Parcel Number: 0710-173-0210-3

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



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## Performance & Financial Analysis

### Proposal for 6.4 kW Photovoltaic System, Modules on Garage

Prepared May 15, 2020 for

**Rick Bernstein**

4913 McKenna Road, Monona, WI 53716

Phone: 608-251-4615

Email: rickbernstein1019@gmail.com



**Prepared by Chad Mahnke**

Project Manager, Full Spectrum Solar, 1240 E. Washington Ave., Madison, WI 53703

Phone: 608-284-9495 Ext: 206 | Email: chad@fullspectrumssolar.com

1) Costs for roof reinforcements or additional racking materials is not included. In the event the roof analysis shows this is required, these costs will be reevaluated.

2) Assumes the system can tie into the existing electrical infrastructure. Added cost may be incurred if the utility and/or local authority having jurisdiction require changes.



## Executive Summary

### Proposal for 6.4 kW Photovoltaic System, Modules on Garage

Electric Utility Savings: Anticipate a savings of approximately \$1,110 in electric bills (40%) at current utility rates in the first year. Savings will grow as electric utility rates are expected to rise 3.00% a year. The purchase of electric energy (kWh) from your utility is expected to be reduced by 43%.

Over 30 years, annual utility savings are anticipated to average \$1,715, for a total utility savings of \$51,445.

#### Performance Summary

Solar Electric (PV) System: 6.4 kW DC producing 8,227 kWh/Year.

#### Purchase Price & Net Cost

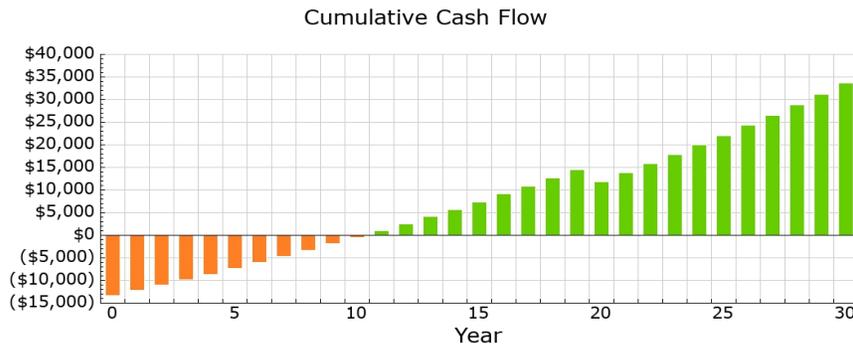
**Contract Price: \$19,532**  
 Incentives to Customer: (\$6,188)  
 Net Purchase Cost: \$13,344

#### Financial Ratios

Cashflow Payback: 10.3 years  
 12 years (modified)  
 Internal Rate of Return (IRR): 9.7%  
 Net Present Value (NPV): \$12,108  
 Cash Gained over Life: \$33,654

- CO2 Saved over System Life: 202 tons. Equivalent to driving 404,000 auto miles

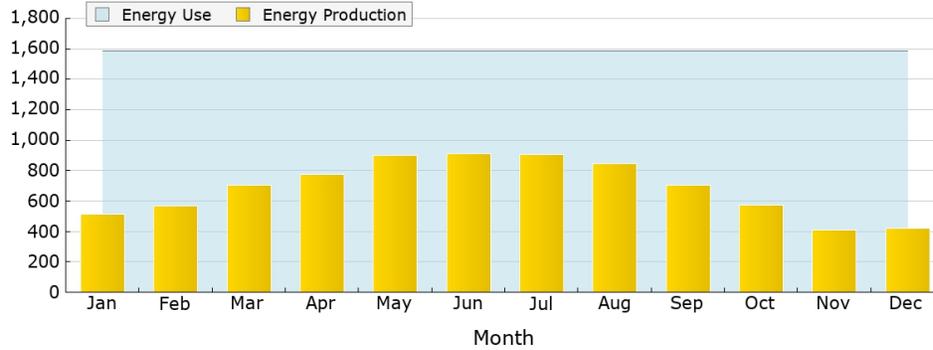
**Finance:** Cash





## Solar Electric (PV) System Summary

Solar Electric (PV) kWh Production by Month (typical)



Tilt: 27° Azimuth: 180° 3" Air Gap  
 Shade reduces production: 10%

PV Panels: 20 x Heliene, Model: 72M320

Inverters: 1 x SolarEdge Technologies, Model: SE6000H-US (240)

Notes: Safety and Protection:

\* Includes installation of critter guard around array.

Total Panel Area: 396 sq-ft

System Peak Power: 6.4 kW DC

Annual Production: 8,227 kWh. Supplying 43% of annual electric use

### **Contract Price Summary: Solar Electric (PV) System**

**Contract Amount: \$19,532** (\$3.05 per watt DC)

#### Incentives available to Customer in 1st Year

Estimated Focus on Energy - 2020 Residential PV Incentive - \$300/kW (max (\$1,500) \$1,500): Limited Funds:

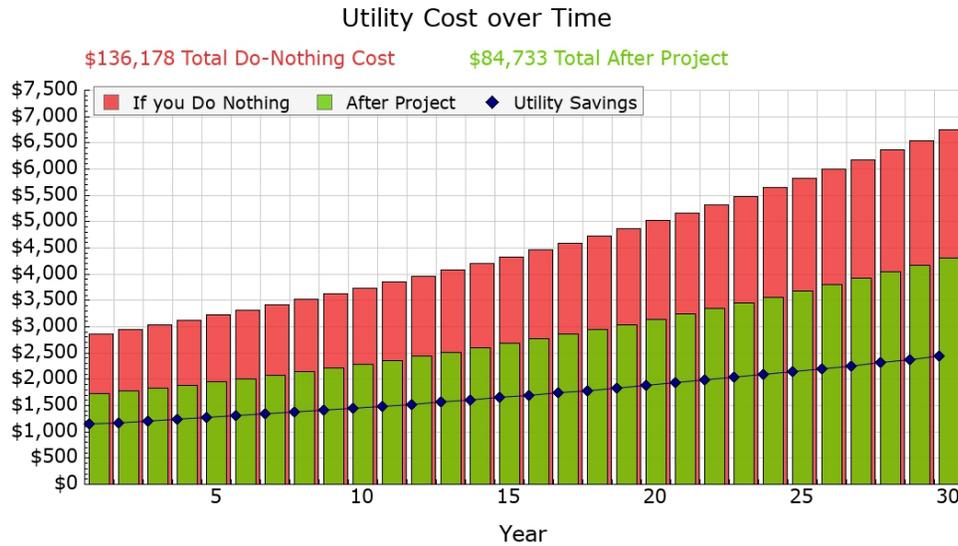
Federal Tax Credit: Year 2020 (26% of Net Cost at Installation): (\$4,688)

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**Net Cost at Install (after incentives): \$13,344**

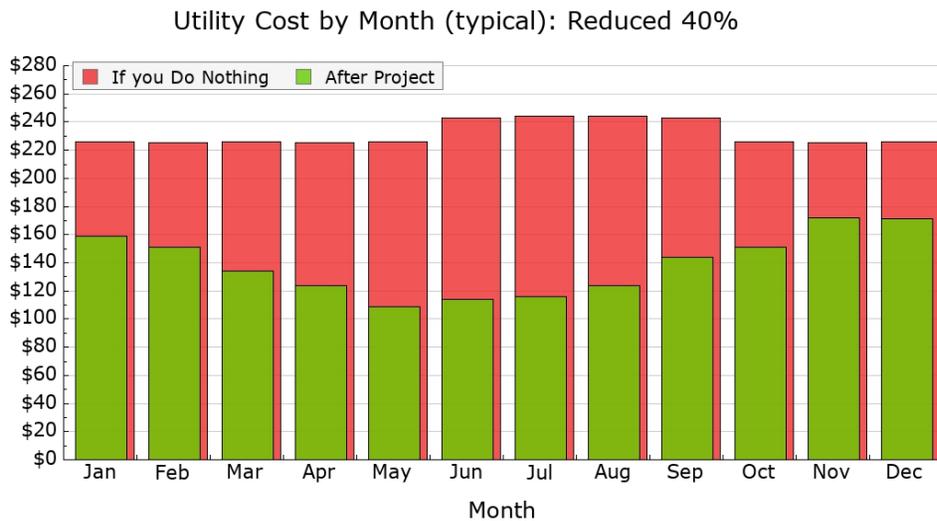
Net Installed Price per Watt: \$2.09 per watt DC

## The Cost of Doing Nothing



Your Hedge Against Utility Inflation: Your investment in this project will protect you from utility rate inflation.

## Utility Cost by Month



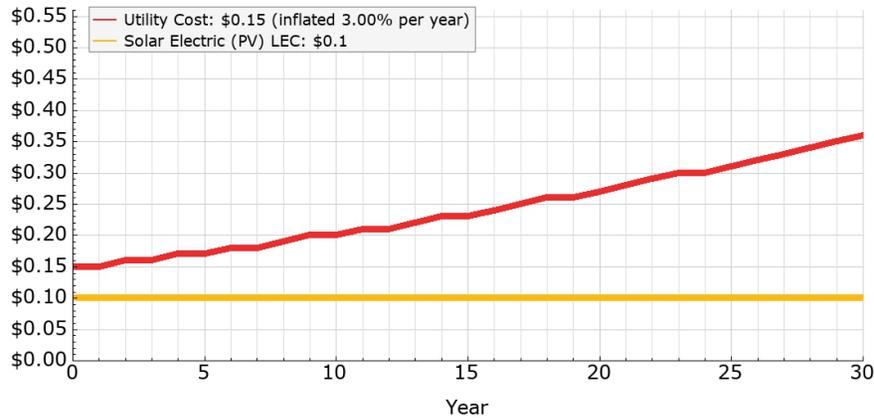


## Levelized Energy Cost (LEC)

Your Hedge Against Utility Inflation: Your investment in this project will protect you from utility rate inflation. Levelized Energy Cost (LEC) analysis provides us with a "hurdle rate" (the levelized energy cost) which can be compared to the expected change in utility rates (by way of utility rate inflation). LEC is the average lifetime cost of energy produced by a particular system. We can compare the LEC to the current utility rate and its expected change in price as time goes on. In this manner one can judge the investment as a "better bet" than utility rates to contain energy costs. Represented below is the average cost of utility energy versus the cost of energy produced (LEC) by your system over time.

### Electric: Levelized Energy Cost (LEC)

\$/kWh: Utility vs. System Levelized Energy Cost (LEC)



## Carbon Footprint

Your carbon footprint will be reduced. Over the life of your system 202 tons of carbon dioxide (CO<sub>2</sub>) will be eliminated from your footprint. Equivalent to:



**Planting 4,707 trees.**



**Driving reduced by 404,000 auto miles, or 20,604 gallons of gasoline.**



**Recycling 638 tons of waste instead of sending it to landfill.**



**196,833 pounds (98.4 tons) of coal burned.**



and you will help avoid the use of up to **4,936,200 gallons of water by Thermoelectric Powerplants.**



## How to Interpret Financial Ratios and Measures

### A Measure of Security: Cashflow Payback: 10.3 years - 12 years (modified)

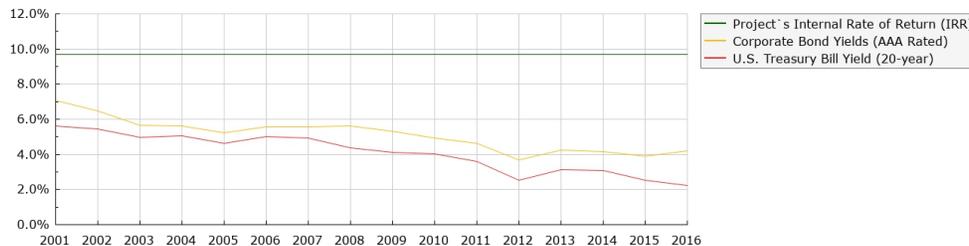
The most common measure of the security of a proposed investment is its payback, defined as the length of time until one gets one's money back. Cashflow Payback is when cumulative cash flow stays positive for good. Modified Cashflow Payback is when the cumulative cash in-flows exceed the total of all cash out-flows over the system life; future maintenance expenses are accommodated.

### Net Present Value (NPV): \$12,108.

What NPV Means: NPV is an indicator of how much value (wealth) an investment adds to the customer. If NPV is positive then the investment would add value. If NPV is zero or negative then other "qualitative" factors may be of adequate value to justify the project (for example, lengthening a swimming pool season). *Net Present Value (NPV)* is one way to account for the time value of money. NPV calculates the current value of each future cash flow. For example, \$1.00 received two years from now is equivalent to something less today, if it can be invested now at some interest rate. This allows us to "discount" the cash flows (whether positive or negative) that the proposed investment is expected to generate at various times in the future back to their equivalent value today (that is, their "present value"). If one then subtracts the cost of the proposed investment from the sum of the present values of the ongoing cash inflows, one obtains the net present value (NPV) of the investment.

### Internal Rate of Return (IRR): 9.7%

*Internal Rate of Return (IRR)* is a common measure of investment efficiency. Equivalent to the yield to maturity of a bond. The internal rate of return (IRR) is the annualized effective compounded rate of return earned on the invested capital.





## Measures of Predictability: Using "hurdle rates" Levelized Energy Cost (LEC)

### Solar Electric (PV): \$0.1 per kWh

Another dimension of concern about a proposed investment is the predictability of its anticipated costs and returns, which requires measures of the uncertainty associated with them. Levelized Energy Cost (LEC) analysis provides us with a "hurdle rate" (the levelized energy cost). LEC is the average lifetime cost of energy produced by a particular system. We can compare LEC to the current utility rate and its expected change in price as time goes on. In this manner one can judge the investment as a "better bet" than utility rates to contain energy costs.

**Assessing Option Value:** The option value of a proposed investment represents the value of future opportunities that would be made available only if the investment were made. Like the ante in a poker game, the investment may promise no return other than the opportunity to look at the cards being dealt, at which point one can either fold or "exercise the option" by making additional investments in an attempt to win the pot. To realize future value here new investments are not necessarily required to "exercise the options" - ownership is enough. In the case of renewable energy systems in general, there are primarily two opportunities, or options, which may have future value: Property value appreciation, and Renewable energy certificates (RECs or SRECs):

Renewable Energy and/or Carbon Credits or Certificate (REC or SREC): Renewable Energy Certificates (sometimes called "solar renewable energy credits/certificates" - SRECs, S-RECs, or simply RECs) are a new and evolving method to ascribe future financial value to a renewable energy system. RECs represent the bundle of legal rights to the "green" part of each unit of energy produced by a renewable energy system. This green part can be sold for a value, which generates additional revenue for the seller. These certificates can be sold and traded or bartered and the owner of the REC can claim to have purchased renewable energy.



## Utility Energy Summary: Electric

### Electric Utility Rates

<u>Current Rate</u>	<u>Post Project Rate</u>
Madison Gas & Electric Co: Residential Service	Madison Gas & Electric Co: Residential Service
Tiered Rate: No	Tiered Rate: No
Time-of-Use Rate: No	Time-of-Use Rate: No
Demand Charges: No	Demand Charges: No

### Summary of Utility & New Source Electricity

Electric by Month (kWh)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
<u>Entered into Software (historical)</u>													
Monthly Use	1,587	1,587	1,587	1,587	1,587	1,587	1,587	1,587	1,587	1,587	1,587	1,587	19,044
Historical Cost	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<u>Estimated by Software at Current Rates</u>													
Estimated Use	1,587	1,587	1,587	1,587	1,587	1,587	1,587	1,587	1,587	1,587	1,587	1,587	19,044
<b>Current Cost</b>	<b>\$226</b>	<b>\$225</b>	<b>\$226</b>	<b>\$225</b>	<b>\$226</b>	<b>\$243</b>	<b>\$244</b>	<b>\$244</b>	<b>\$243</b>	<b>\$226</b>	<b>\$225</b>	<b>\$226</b>	<b>\$2,779</b>
PV Production	(514)	(567)	(702)	(776)	(898)	(910)	(905)	(848)	(705)	(574)	(410)	(418)	
Post Project Use	1,073	1,020	885	811	689	677	682	739	882	1,013	1,177	1,169	10,817
<b>Post Project Cost</b>	<b>\$159</b>	<b>\$151</b>	<b>\$134</b>	<b>\$124</b>	<b>\$109</b>	<b>\$114</b>	<b>\$116</b>	<b>\$124</b>	<b>\$144</b>	<b>\$151</b>	<b>\$172</b>	<b>\$171</b>	<b>\$1,669</b>
<u>Production Self-Consumption Percent:</u>													
	49%	48%	44%	45%	40%	41%	41%	40%	47%	51%	62%	58%	



## Cash Flow Details for the System

Cash Flows in Year	<u>0</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>
Gross Cost: PV	(19,532)				
Utility Bill Savings with Inflation Applied	0	1,143	1,174	1,205	1,237
<u>Solar Electric (PV) Incentives</u>					
Estimated Focus on Energy - 2020 Residential PV Incentive - \$300/kW (max \$1,500): Limited Funds	1,500	0	0	0	0
Federal Tax Credit: Year 2020 (26% of Net Cost at Installation)	4,688	0	0	0	0
Total Incentives	6,188	0	0	0	0
<b>Net Annual Cash Flow</b>	<b>(13,344)</b>	<b>1,143</b>	<b>1,174</b>	<b>1,205</b>	<b>1,237</b>
Cumulative Cash Flow	(13,344)	(12,201)	(11,027)	(9,822)	(8,585)

Net Annual Cash Flow is the sum of values in gray lines.

Cash Flows in Year	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>
Utility Bill Savings with Inflation Applied	1,270	1,304	1,339	1,374	1,411
<b>Net Annual Cash Flow</b>	<b>1,270</b>	<b>1,304</b>	<b>1,339</b>	<b>1,374</b>	<b>1,411</b>
Cumulative Cash Flow	(7,315)	(6,011)	(4,672)	(3,298)	(1,887)

Cash Flows in Year	<u>10</u>	<u>11</u>	<u>12</u>	<u>13</u>	<u>14</u>
Utility Bill Savings with Inflation Applied	1,448	1,487	1,526	1,566	1,608
<b>Net Annual Cash Flow</b>	<b>1,448</b>	<b>1,487</b>	<b>1,526</b>	<b>1,566</b>	<b>1,608</b>
Cumulative Cash Flow	(439)	1,048	2,574	4,140	5,748

Cash Flows in Year	<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>
Utility Bill Savings with Inflation Applied	1,651	1,694	1,739	1,785	1,833
<b>Net Annual Cash Flow</b>	<b>1,651</b>	<b>1,694</b>	<b>1,739</b>	<b>1,785</b>	<b>1,833</b>
Cumulative Cash Flow	7,399	9,093	10,832	12,617	14,450

Cash Flows in Year	<u>20</u>	<u>21</u>	<u>22</u>	<u>23</u>	<u>24</u>
O&M Cost: PV	(4,447)	0	0	0	0
Utility Bill Savings with Inflation Applied	1,881	1,931	1,982	2,035	2,088
<b>Net Annual Cash Flow</b>	<b>(2,566)</b>	<b>1,931</b>	<b>1,982</b>	<b>2,035</b>	<b>2,088</b>
Cumulative Cash Flow	11,884	13,815	15,797	17,832	19,920



### Cash Flow Details for the System

Cash Flows in Year	<u>25</u>	<u>26</u>	<u>27</u>	<u>28</u>	<u>29</u>
Utility Bill Savings with Inflation Applied	2,143	2,199	2,257	2,317	2,378
<b>Net Annual Cash Flow</b>	<b>2,143</b>	<b>2,199</b>	<b>2,257</b>	<b>2,317</b>	<b>2,378</b>
Cumulative Cash Flow	22,063	24,262	26,519	28,836	31,214

Cash Flows in Year	<u>30</u>	<u>31</u>	<u>32</u>	<u>33</u>	<u>34</u>
Utility Bill Savings with Inflation Applied	2,440	0	0	0	0
<b>Net Annual Cash Flow</b>	<b>2,440</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Cumulative Cash Flow	33,654	0	0	0	0



## Other Assumptions Used in this Analysis

**Customer Type:** Residential.

**Tax Effects Applied to Utility Savings:** As a residential customer, we have assumed Post-tax (net income) dollars are saved. Therefore no tax effects are assumed.

**System Life:** PV System: 30 years. Inverters: 20 years.

**PV System Modeling Variables (PVWatts references):** System Losses: 9.5%, DC-to-AC Ratio: 1.06, Module Type: Standard, Inverter Efficiency: 99.00%.

**Performance Degradation and O&M Costs:** We have assumed performance will degrade by 0.50% per year due to soiling and general wear. Annual operating and maintenance (O&M) costs are inflated 2.80% per year, and are estimated as a percent of gross system price, as follows: Solar Electric (PV): 0.00%.

**Income Tax Rates:** Federal: 28.00%, State: 5.00%

**Annual Inflation Rates:** Consumer price index: 2.80%, Electric Rates: 3.00%

**Energy Metering Type:** Net Metering

**Net Excess Generation (NEG):** Monthly NEG credited at Utility Rate. Monthly NEG may be carried forward to the next month for application to future utility bills. Annual NEG sold at \$0.03500 per kWh. Annual NEG may be carried forward to the next year and may become available for application to future utility bills or paid upon sale of the property. Please refer to your Utility's Net Metering rules to understand how this may apply in your particular case.

**Discount Rate:** 4.00%. Used to estimate net present value of future cash flows.

**Carbon Dioxide (CO2) Calculations:** The following assumptions are used to calculate carbon dioxide (CO2) reductions: Electricity: 1.64 lbs. CO2 per kWh. Natural Gas: 0.12 lbs. CO2 per cubic foot (12 lbs. per Therm). Fuel Oil: 22.29 lbs. CO2 per gallon. Propane: 12.17 lbs. CO2 per gallon. Trees Planted: 0.0429 tons CO2 per Tree planted (23.3 Trees/Ton CO2). Automiles Saved: 1 lb CO2 per mile for medium passenger car (2,000 Miles/Ton CO2). Gallons Gasoline: 0.009812 tons CO2/gallon (102 Gal/Ton CO2). Landfill Tons: 3.16 tons CO2 per ton of waste recycled instead of landfilled. Single-family Homes (electric use): 8.82 tons CO2/home (0.11 Homes/Ton CO2). Tons of Coal Burned: 2.0525 lbs. of CO2 per lb. of Coal (2,000 lbs. per ton). Source: [www.epa.gov/cleanenergy/energy-resources/refs.html](http://www.epa.gov/cleanenergy/energy-resources/refs.html)

**Water used by Thermoelectric Powerplants:** Depending upon the technology used, natural gas and coal power plants withdraw up to 20 gallons of water for every kWh of energy produced and consume (via evaporation) about 0.47 gallons per kWh produced. Sources: <http://nrel.gov/docs/fy04osti/33905.pdf> and <http://www.wri.org/resources/charts-graphs/typical-range-water-withdrawals-and-consumption-thermoelectric-power-plants> which summarizes the Electric Power Research Institute's report *Water & Sustainability (Volume 3): U.S. Water Consumption for Power Production - The Next Half Century*

Costs for roof reinforcements or additional racking materials is not included. In the event the roof analysis shows this is required, these costs will be reevaluated.

Please verify with a professional tax advisor to see if you qualify for the Federal tax credit.



Assumes the system can tie into the existing electrical infrastructure. Added cost may be incurred if the utility and/or local authority having jurisdiction require changes.



## Renewable Resources

The following renewable resource assumptions were used to develop estimates for the project location. These are typical values based upon observed data over several decades. Actual values (and system performance) will vary from month to month, and from year to year, in accordance to weather and climate pattern changes.

Weather station referenced: "MADISON DANE CO REGIONAL ARPT [ISIS]" (Wisconsin)

### Solar Resources: Flat-Plate, South-facing Tilted at Latitude

Month	<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Jun</u>	<u>Jul</u>	<u>Aug</u>	<u>Sep</u>	<u>Oct</u>	<u>Nov</u>	<u>Dec</u>
<b>kWh/m<sup>2</sup>/day</b>	3.226	3.885	4.262	4.834	5.414	5.659	5.571	5.37	4.821	3.841	2.829	2.683



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

**MEETING DATE: September 22, 2020**

**AGENDA ITEM 7.C.  
CASE NO. 2020-8**

**Project:** Request for Renew Monona Loan Funds  
**Project Address:** 6015 Gateway Green  
**Applicant:** Natallia Hanson

**Proposal Summary:**

Ms. Natallia Hanson (the “Applicant”) owns the property at 6015 Gateway Green (the “Property”), and has submitted a Renew Monona Loan application requesting \$3,697.00 from the Home Improvement category (the “Application”) to conduct the following improvements to the existing residence (the “Project”):

- Replacement of original windows with energy efficient alternatives.
- Installation of new gutters.

Per the Application, the proposed total cost of improvements is \$7,394.00 with the indicated loan request of \$3,697.00. The Applicant provided received cost estimates for the work which is included as Attachment 4-6. They indicated that they would be going with the less expensive Ecoview quote, rather than the Waunakee Remodeling quote. The maximum loan amount is 50% of the total project cost, meaning the maximum that could be granted by the CDA would be \$3,697.00.

**Staff Review of Eligibility Criteria:**

	<b>Criteria</b>	<b>Criteria Met</b>	<b>Notes</b>
1	Property is owner-occupied	Yes	Ms. Hanson has lived in this home for the last 3 years.
2	Assessed Property Value	Yes	Total Assessed Value (TAV) of \$292,300.00 as of 1/1/2020.
3	Assessed Property Value less than or equal to 120% of Median Sold Home Price	Yes	TAV of \$292,300.00 is less than the 120% of the median assessed value of residential properties of \$358,200.00 as of 01/01/2020.
4	Applicant to maintain at residence for at least 2 Years after Project	Yes	Ms. Hanson indicated that she will remain at the residence for at least 2 years after the improvements are completed.
5	Proposed Improvements are to Primary Structure	Yes	The proposed improvements are to the main structure.
5	Proposed improvements are eligible uses of Program Loan Funds	Yes	The applicant applied for the Home Improvement program, which includes energy efficient upgrades. The requested loan amount

			is within the maximum loan amount for the program.
6	Proposed improvements will increase the assessed value of the home.	Yes	New windows and gutters will enhance the livability of the home, and likely increase assessed value.
7	Proposed improvements will improve the attractiveness of the home and the neighborhood to potential future home buyers.	Yes	New windows are a sound investment, as is addressing drainage issues that may impact the foundation.
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 Wintrust Bank. 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.	The original windows are in need of upgrading, and the cracked seals compromise the energy efficiency of the existing home. The gutter replacement will help address water issues closest to the building foundation.
B	Improvements are long-lasting and will enhance the quality of the home for years to come.	Both the windows and gutters are long term improvements that will enhance both the function and curb appeal of the home.
C	Proposed improvements will increase the energy efficiency of the home.	The new windows will enhance the energy efficiency as compared to the current windows. The applicant indicated the seals are cracked, and many are original on this 1950's home.
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 she will use a personal loan for her portion of the Project (\$13,377.00), assuming that CDA approves the full loan amount. The Applicant has not started work on the project, and will wait until a decision has been made by the CDA.

**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 6015 Gateway Green (from Dane County Property Information)
- Attachment 3 - Parcel Records for 6015 Gateway Green (from Dane County Property Information)
- Attachment 4 – Submitted Project Cost Estimates from Waunakee Remodeling

- Attachment 5 – Ecoview Windows cost estimate
- Attachment 6 – Leaf Filter Cost Estimate

# 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](mailto: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: Natallia Hanson  
Address: 6015 Gateway Green, Monona WI 53716 Phone: (608) 574-6724  
Name of Employer: Dane County Communications (911) Contact Person: Supervisor Leslie O'Kane  
Employer Address: 210 Martin Luther King Jr Blvd #109, Madison, WI 53703  
Employer Phone: (608) 267-3911 Number of years at this job: 1 yr 5 mo

## Co-Applicant Information:

Name of Co-Applicant: none  
Address: \_\_\_\_\_ Phone: \_\_\_\_\_  
Name of Employer: \_\_\_\_\_ Contact Person: \_\_\_\_\_  
Employer Address: \_\_\_\_\_  
Employer Phone: \_\_\_\_\_ Number of years at this job: \_\_\_\_\_

## Other Information:

Household size: 3 How long have you lived at your current residence? 3 years  
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: 6015 Gateway Green, Monona WI 53716  
Number of bedrooms: 3 Age of home: 1952  
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
X	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.
	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 brochure for details.</i>				

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

The house I own is older like many Monona home. A few windows were updated last year, but I still have a majority of the house with old, original windows with cracked seals. I am wanting to upgrade the windows, as well as the insulation to improve the energy efficiency of the home. So far I have obtained several quotes for the remaining windows and the cost is roughly \$18,000-\$25,000. I have two more contractors coming out today for an estimate. I have attached one of the cost estimates for you to use. I am also upgrading the gutters which were allowing water to pool around the foundation. That is another \$3,400.

Professional cost estimate attached.

**Total Cost of Improvements:** \$ 26,754

**Amount of Loan You Are Seeking:\*** \$ 13,377

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

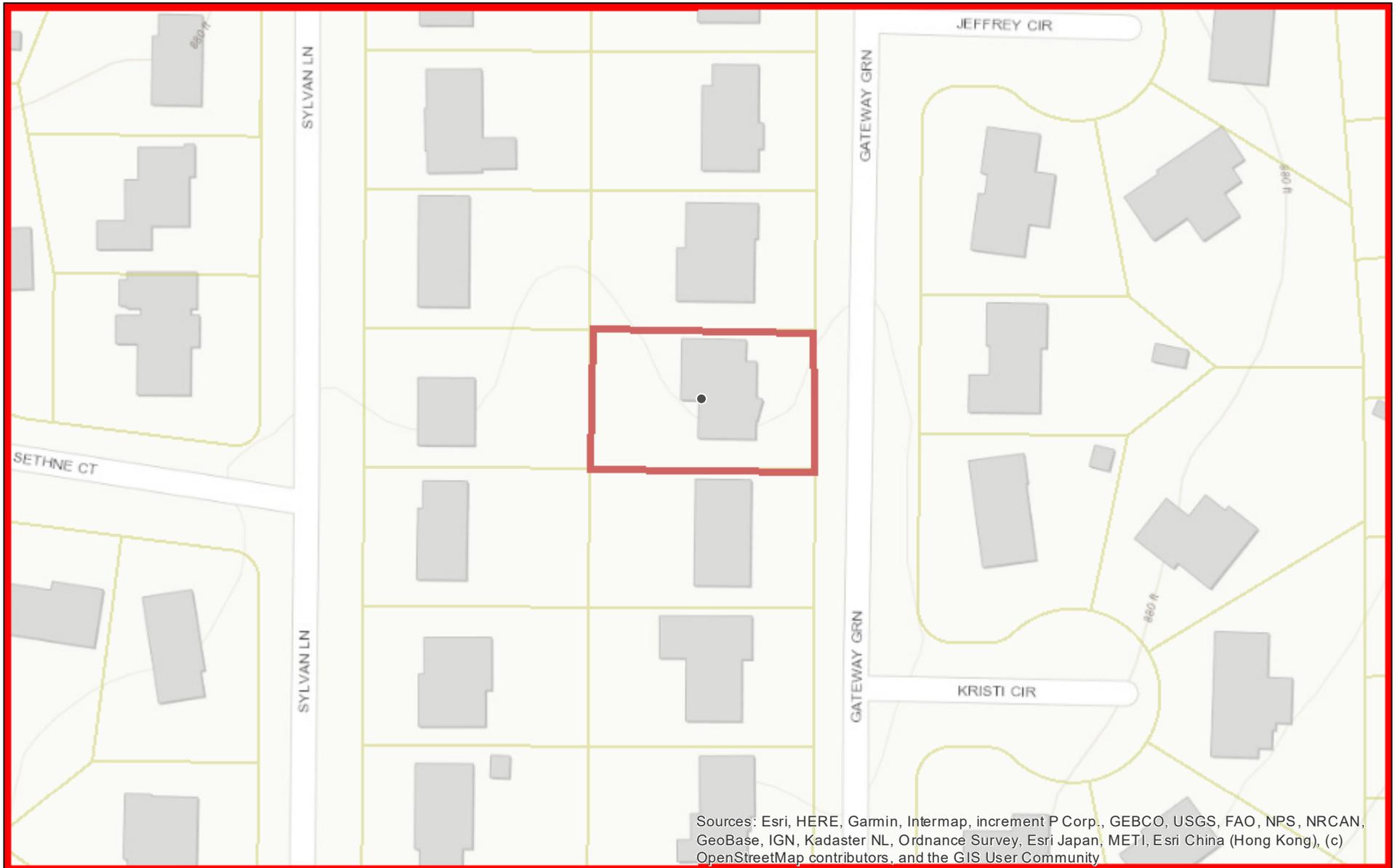
**Certification:** I hereby certify that to the best of my knowledge and belief, the content of the application is true and correct. I/we consent to the disclosure of such information for purposes of income and verification related to my/our application for financial assistance. I/we understand that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

Signature of applicant: W. Hansen Date: 09/13/2020

Signature of co-applicant: \_\_\_\_\_ Date: \_\_\_\_\_

For internal use only

# 6015 Gateway Green



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), (c) OpenStreetMap contributors, and the GIS User Community

September 14, 2020

## Dane County Mask

-  Dane County Mask
-  Parcels

0 50 100 200 Feet



**Parcel Number -  
258/0710-204-0570-0**

**Current**

**Summary Report**

[← Parcel  
Parents](#)

**Parcel Summary** [More +](#)

Municipality Name	CITY OF MONONA
Parcel Description	THIRD ADDN SYLVAN ESTATES LOT 110
Owner Name	NATALLIA F HANSON 
Primary Address	6015 GATEWAY GRN
Billing Address	6015 GATEWAY GRN MONONA WI 53716

**Assessment Summary** [More +](#)

Assessment Year	2020
Valuation Classification	G1
Assessment Acres	0.239
Land Value	\$70,600.00
Improved Value	\$221,700.00
Total Value	\$292,300.00

[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
\$70,600.00	\$198,800.00	\$269,400.00
<b>Taxes:</b>		\$5,853.94
<b>Lottery Credit(-):</b>		\$258.99
<b>First Dollar Credit(-):</b>		\$93.34
<b>Specials(+):</b>		\$0.00
<b>Amount:</b>		\$5,501.61
<a href="#">2019 Tax Info Details</a>		<a href="#">Tax Payment History</a>

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	08/04/2020	5620899		

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: 0710-204-0570-0. 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.



Access Dane is a product of  
Dane County Land Information  
Council  
© Copyright 2001

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



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# Waunakee Remodeling

2020 Retail Pricing



Natallia Hanson

Gerry Frantz

08/31/2020

Quote



Retail Price

\$32,443

\$/MONTH

WINDOWS 12

DOORS 0

Local Offer

\$3,244

RENEWAL SAVINGS DISCOUNT 10%

GOOD FOR 30 DAYS

Volume Promotion

\$4,379

15% VOLUME DISCOUNT

GOOD FOR 30 DAYS

Initial Visit Reward

\$744

3% SAVINGS WHEN YOU BUY TODAY!

Financing is provided by a third party lender not affiliated with RbA. RbA is neither a broker nor a lender, and all financing is subject to terms and conditions to be negotiated and agreed upon between the customer and the lender. Any references to finance rates or terms are estimates only.

\$9,089  
SAVINGS

Final Full discount

\$722

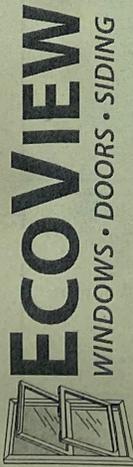
Renewal  
by Andersen  
WINDOW REPLACEMENT



Discounted Price

\$23,354

\$/MONTH



Milwaukee: 262-208-1213  
 Madison: 608-630-8898  
 Green Bay: 920-770-9222

**WINDOW & DOOR  
 CONTRACT**

Page      of     

Buyer: Natalia Hanson  
 Address: 6015 Gateway Green  
 City, State, Zip Code: Monroe, WI  
 Primary Number: 608-574-6724  
 Secondary Number:  
 Email: nattyg10@gmail.com

Qty.	Location	Current Style	New Style	Opening Size		Product Line	Color		Grids			Triple Pane	Lead	Int. Stop	Int. Casing	Full Screen	Temp	Obscure	Additional Options/Items/Comments
				Width	Height		Interior	Exterior	Type	Style	Location								
2	Living	Slider	Slider	65	55	9000	wht	wht	-	-	-	-	X	-	-	-	-	-	
5	Sunroom	Pic/ease	DH	39	52	9000	wht	wht	-	-	-	-	X	-	-	-	-	-	Mulls removed in 3 openings

Extra Work/Comment:  
 - Lifetime warranty windows  
 - remove windows lead safe  
 - reaslate openings/trim out outside windows in whole  
 - installed to code and in accordance with manufacturer spec and warranty  
 App # 2689178

Qty.	Door Type	Style	Line	Entry Doors, Storm Doors and Patio Doors:			Options
				Int. Color	Ext. Color	Size	

Subtotal: \$       
 Extra Work: \$       
 3% Convenience Fee: \$       
 Disposal Fee: \$ 195.00  
**Contract Total: \$ 4600**  
 Deposit Amount: \$ 50  
 Amount Financed: \$ 4550  
 Balance Due @ Completion: \$ 4550

Date: 9/14/20  
 Date: 9/14/20  
 EcoView Representative: N. Hanson  
 Homeowner Signature: \_\_\_\_\_  
 Homeowner Signature: \_\_\_\_\_

EcoView is not responsible for any staining or painting needed as a result of the work performed, unless otherwise specified. The measurements (above) are approximate, and for pricing purposes only.  
 It is agreed and understood by the Buyer(s) and between EcoView that this agreement, front and back, constitutes the entire understanding between the parties. There are NO verbal agreements changing or modifying any of the terms of this agreement. The Buyer(s) have read the front and back of this agreement and have received a signed and dated copy of this agreement.  
 You, the Buyer(s), may cancel this transaction at any time prior to midnight of the third business day after the date of this transaction. Notice of Cancellation must be in writing and postmarked no later than midnight of the following third business day. This is a custom order, and NOT for resale.

LF

**LeafFilter™ North of Wisconsin, Inc.**

1020 James Dr. Suite A  
Hartland, WI 53029

Main

1-800-290-6106

Customer Service 1-800-749-4566

www.LeafFilter.com/Contact



SAGE ID  
3423373

mil 21051

THIS AGREEMENT, made and entered into between Natalia Hanson, (OWNER) and

LeafFilter™ North of WI, Inc. (CONTRACTOR), who agrees to furnish all labor and materials necessary to perform the work hereinafter on

the premises of the Owner located at 6015 Gateway Green, in the city of Monona,

State of WI Zip Code 53716 PH# H/W/C: 6085746724 ALT.PH# H/W/C: \_\_\_\_\_

Email Address: nattyg1@gmail.com  Full or Partial, Please Explain: \_\_\_\_\_

A Fully Insured & Factory Certified LeafFilter Installer Will...

Remove Debris From Interior of Gutters & Downspouts

Seal Gutter Endcaps Corners & Outlets Using Tri-Polymer Gutter Sealant

Reinforce Gutters Using Hidden Hanger Gutter Brackets

Install LeafFilter Gutter Protection (Size/Color: White) - Includes Transferable Lifetime Product Warranty

Thoroughly Clean Up Entire Job Site Work Area, and Haul Away All Job Related Debris Off Site

**PAYMENT TERMS:**

In consideration of the labor, material and repair, if any, furnished by said Contractor, the Owner agrees to pay to the Contractor:

A. Contract Price, including tax.....\$ 3159.00

TBD Customer  
to call and set date

Down Payment \$ 315.00 on CC

Approx. Start & Completion Date: waiting on Shingle work

Unpaid Balance \$ 2844.00 COD

Pay Terms: Installer to collect  
COD check on completion

- B. It is hereby understood and agreed that the unpaid balance of cash price or the bank completion certificate must be paid to the Seller's installer at the time the work is completed.
- C. If full price for all contract work is not to be paid in cash, then this contract is subject to financing approval.
- D. Installation is subject to production scheduling, weather conditions and related factors. The Contractor shall furnish materials for the work and complete the work to be done in a substantial and professional manner. All workmanship is guaranteed for one (1) calendar year. Service calls after one (1) year shall be subject to a service charge.
- E. You, the buyer, may cancel this Agreement of purchase by mailing a written notice to the seller post-marked not later than the third business day after the date this Agreement was signed. It is agreed that if the Owner cancels this contract AFTER THREE (3) DAYS from date of acceptance and before commencement of work, through no fault of the Contractor, the Owner agrees to pay 25% of the contract price or the cost of the materials purchased by the Contractor to the date of cancellation, whichever is greater.

IN WITNESS WHEREOF, the Owner and Contractor have caused these present to be signed this:

Month 9, Day 2, Year 20 20

N. Hanson  
Owner

Kody Haback  
Sales Representative

Owner

**Resolution No. 20-10-2444  
Monona Common Council**

**APPROVING THE 2021-2025 CAPITAL IMPROVEMENTS PROGRAM AND  
2021 CAPITAL BORROWING**

**WHEREAS**, the City Council has considered a Capital Improvements Program Budget for 2021–2025 as prepared by the Mayor and City Administrator in cooperation with Department Managers and in consideration of recommendations by the various Boards, Committees, and Commissions.

**NOW, THEREFORE, BE IT RESOLVED**, by the Common Council of the City of Monona, Dane County, Wisconsin, that the 2021-2025 Capital Improvements Program Budget and the 2021 Capital Borrowing are hereby adopted.

Adopted this \_\_\_\_\_ day of \_\_\_\_\_, 2020.

BY ORDER OF THE CITY COUNCIL  
CITY OF MONONA, WISCONSIN

\_\_\_\_\_  
Mary K. O'Connor  
Mayor

ATTEST:

\_\_\_\_\_  
Joan Andrusz  
City Clerk

Council Action:

Date Introduced: 10-5-20

Date Approved: \_\_\_\_\_

# 2021 CAPITAL BUDGET AMENDMENT

## No. 21-01

ACCOUNT NUMBER				ACCOUNT NAME	BUDGET PRIOR TO CHANGE	INCREASE	DECREASE	AMENDED BUDGET
FUND	CC	Acct#	Obj					
2021				EV Charging Station -City Hall	\$ 7,000	\$ -	\$ 7,000	\$ -
Total Amendment						<u>\$ -</u>	<u>\$ 7,000</u>	

Description                      To remove EV charging station installations at City Hall because the project is not needed now.

Sponsored by:                      Mayor O'Connor

# 2021 CAPITAL BUDGET AMENDMENT

## No. 21-02

ACCOUNT NUMBER				ACCOUNT NAME	BUDGET PRIOR TO	INCREASE	DECREASE	AMENDED BUDGET
FUND	CC	Acct#	Obj		CHANGE			
2021				Parks- Stone Bridge Park	\$ 335,000	\$ -	\$ 309,000	\$ 26,000
				Total Amendment		<u>\$ -</u>	<u>\$ 309,000</u>	

Description      Amendment to do only the stormwater basin installation, pagoda repair, and add a bench, sign and a bike rack at Stone Bridge park.

Pagoda Repair	\$ 20,000.00
Sign	3,000.00
Bench	2,000.00
Bike Rack	1,000.00
	<u>\$ 26,000.00</u>

Sponsored by:                      Alder Goforth

# 2021 CAPITAL BUDGET AMENDMENT

No. 21-03

ACCOUNT NUMBER				ACCOUNT NAME	BUDGET PRIOR TO	INCREASE	DECREASE	AMENDED BUDGET
FUND	CC	Acct#	Obj		CHANGE			
2021				Engineering Speed Humps	\$ 35,000	\$ -	\$ 20,000	\$ 15,000
				Total Amendment		<u>\$ -</u>	<u>\$ 20,000</u>	

Description      Remove \$20,000 from the Public Works budget for engineering of speed humps at various locations.  
 Keep \$15,000 for engineering at Schluter/bait shop.

Sponsored by:                      Alder Kuhr

# 2021 CAPITAL BUDGET AMENDMENT

No. 21-04

ACCOUNT NUMBER				ACCOUNT NAME	BUDGET PRIOR TO	INCREASE	DECREASE	AMENDED BUDGET
FUND	CC	Acct#	Obj		CHANGE			
2021				Library Building Envelope Study	\$ -	\$ 12,000	\$ -	\$ 12,000
Total Amendment						<u>\$ 12,000</u>	<u>\$ -</u>	

Description      Add \$12,000 to Library Budget for Building Envelope Study.  
 Uses \$6,000 from savings on amendment 21-03 and \$6,000 from the Library Fund Balance.

Saving For 21-03	\$ 6,000
Library Fund Balance	6,000
	<u>\$ 12,000</u>

Sponsored by:                      Alder Kuhr

# 2021 CAPITAL BUDGET AMENDMENT

## No. 21-05

ACCOUNT NUMBER				ACCOUNT NAME	BUDGET PRIOR TO	INCREASE	DECREASE	AMENDED BUDGET
FUND	CC	Acct#	Obj		CHANGE			
2021				Schluter/Waterman Park Design	\$ -	\$ 15,000	\$ -	\$ 15,000
				Total Amendment		<u>\$ 15,000</u>	<u>\$ -</u>	

Description      To reinstate the \$15,000 for the Schluter / Waterman design proposed by the Park & Rec Director and the Parks Board.

Sponsored by:                      Alders Wood and Grupe

# 2021 CAPITAL BUDGET AMENDMENT

No. 21-06

ACCOUNT NUMBER				ACCOUNT NAME	BUDGET PRIOR TO CHANGE	INCREASE	DECREASE	AMENDED BUDGET
FUND	CC	Acct#	Obj					
2021				Engineering Speed Humps	\$ 35,000	\$ 38,000	\$ -	\$ 73,000
Total Amendment						<u>\$ 38,000</u>	<u>\$ -</u>	

Description

Funding to complete design and construction of one (1) raised crosswalk connecting Schluter and Waterman Parks and one (1) McKenna-style speed hump at the intersection of Outlook St. and Winnequah Road. These locations are on collector streets in Monona, where complaints of speeding have been reported. The installation of speed humps will help keep auto traffic near the posted speed limits, and will allow for a Parks Board-recommended, pedestrian-friendly connector between two popular parks in Monona.

This amendment replaces the purposed engineering speed humps at various locations.

Engineering and Bidding	13,000
Construction	50,000
Project Administration	<u>10,000</u>
	<u><u>73,000</u></u>

Sponsored by:

Alder Grupe

# 2021 CAPITAL BUDGET AMENDMENT

## No. 21-07

ACCOUNT NUMBER				ACCOUNT NAME	BUDGET PRIOR TO	INCREASE	DECREASE	AMENDED
FUND	CC	Acct#	Obj		CHANGE			BUDGET
2021				Engineering Speed Humps	\$ 35,000	\$ -	\$ 10,000	\$ 25,000
Total Amendment						<u>\$ -</u>	<u>\$ 10,000</u>	

Description

To reduce funding for Engineering - Speed Humps Various Locations from \$35,000 to \$25,000

The amendment reduces the number of speed tables from 6 to 4. The 4 locations are:

1. Winnequah north of and near Outlook;
2. Winnequah south of and near Waterman;
- 3 and 4. Bridge Road between Frost Woods and Winnequah.

Sponsored by:

Alder Wood

**From:** [Marc Houtakker](#)  
**To:** [Leah Kimmell](#)  
**Subject:** FW: Traffic volumes  
**Date:** Thursday, October 1, 2020 12:33:31 PM  
**Attachments:** [image001.png](#)

---

For amendment 21-7

---

**From:** Doug Wood <dwood@ci.monona.wi.us>  
**Sent:** Thursday, October 1, 2020 12:00 PM  
**To:** Marc Houtakker <MHoutakker@ci.monona.wi.us>  
**Cc:** Mary O'Connor <moconnor@ci.monona.wi.us>; Molly Grupe <mgrupe@ci.monona.wi.us>; Bryan Gadow <BGadow@ci.monona.wi.us>; Daniel Stephany <dstephany@ci.monona.wi.us>  
**Subject:** Fwd: Traffic volumes

Marc, please also include this email with the speed hump amendment.

Doug

Doug Wood  
Monona Alder  
Council President  
[dwood@ci.monona.wi.us](mailto:dwood@ci.monona.wi.us)

---

**From:** Schaefer, William <[WSchaefer@cityofmadison.com](mailto:WSchaefer@cityofmadison.com)>  
**Sent:** Thursday, October 1, 2020 11:47:49 AM  
**To:** Doug Wood <[dwood@ci.monona.wi.us](mailto:dwood@ci.monona.wi.us)>  
**Subject:** RE: Traffic volumes

Hi Doug,

We did an analysis of this and wrote an article on it in an E newsletter. The newsletter is [here](#). We will be sending out soon, but are waiting for city IT to do something before we can send out the email version. City of Madison has a neat COVID Dashboard (though for internal users I think only). From their count sites (Monore, S Park, Atwood), traffic volumes haven't rebounded quite as much as estimated by StreetLight data. They show the avg. volume for those sites at 13,500 compared to 18,000 in 2019, still 75% of pre COVID levels. Looking at just roadways over 10K in volume, we found volumes at 80-95% of pre COVID levels. Peak volumes seem even lower though with so fewer people driving to work.

**Bill Schaefer**

PLANNING MANAGER

ph: (608) 266-9115

email: [wschaefer@cityofmadison.com](mailto:wschaefer@cityofmadison.com)

[GreaterMadisonMPO.org](http://GreaterMadisonMPO.org)

Follow us on Facebook! [@GreaterMadisonMPO](#)



*The 2020 Census is here! As we practice social distancing, take the opportunity to complete the census now from the comfort of your own home. You can fill it out online at [my2020census.gov](https://my2020census.gov), by [phone](#), or by [mail](#).*

---

**From:** Wood, D <[dwood@ci.monona.wi.us](mailto:dwood@ci.monona.wi.us)>  
**Sent:** Thursday, October 1, 2020 10:36 AM  
**To:** Schaefer, William <[WSchaefer@cityofmadison.com](mailto:WSchaefer@cityofmadison.com)>  
**Subject:** Traffic volumes

Caution: This email was sent from an external source. Avoid unknown links and attachments.

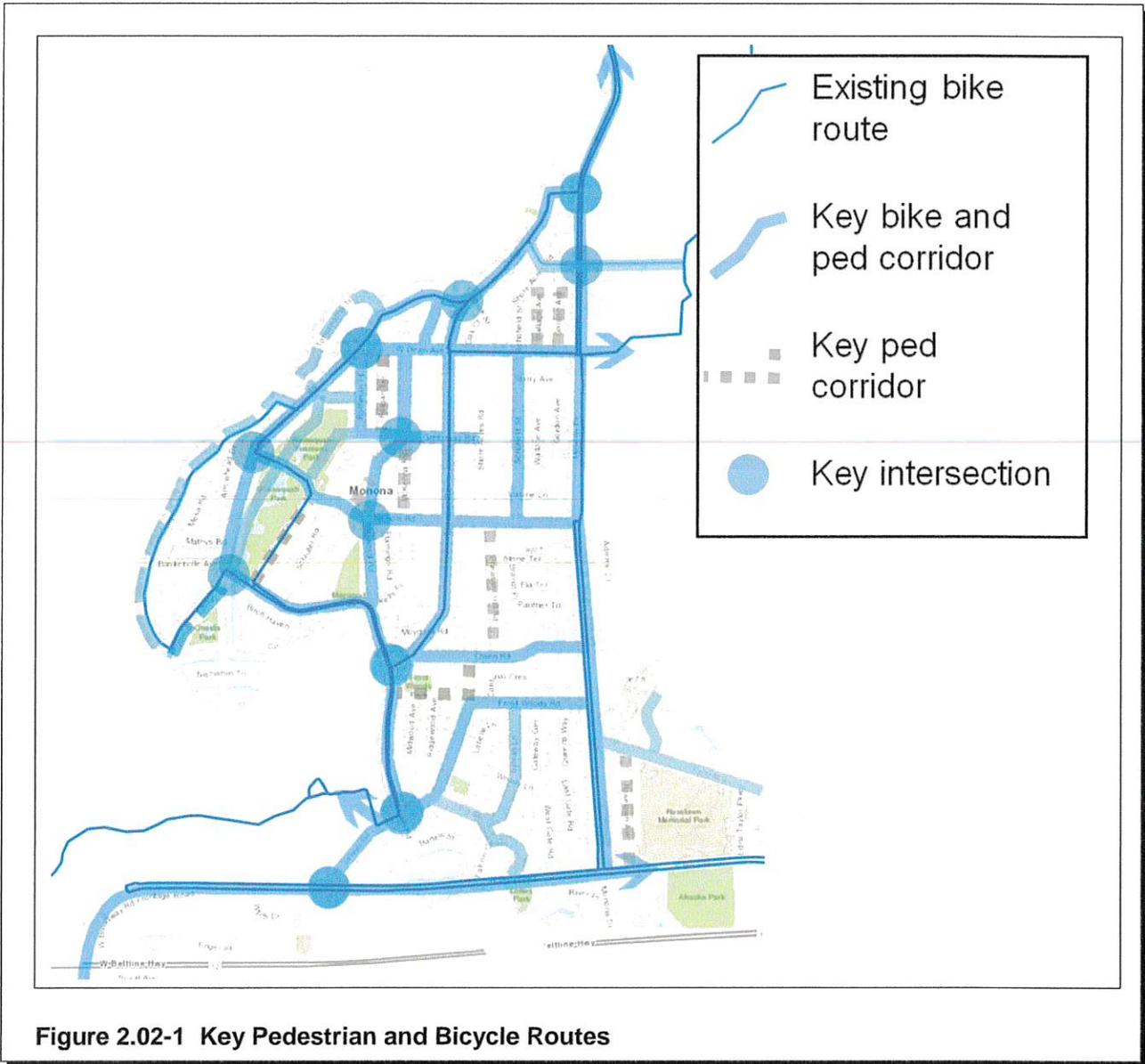
Hi Bill,

Can you tell me how much traffic volumes are currently being impacted by covid in the Madison area? Streetlight changed the way they display their data - percent change is shown in comparison to the prior month. What I'm trying to get a handle on is how traffic volumes in September 2020 compare to 2019.

Any info will be appreciated.

Thanks, Doug

Doug Wood  
Monona Alder  
Council President  
[dwood@ci.monona.wi.us](mailto:dwood@ci.monona.wi.us)



**3.01 ENGINEERING RECOMMENDATIONS**

The recommendations in the full City of Monona Pedestrian and Bicycle Plan are organized based on “the 6 Es” which include: Education, Encouragement, Enforcement, Equity, Engineering, and Evaluation. This report focuses on the Engineering component. The Engineering component includes recommendations on how to modify transportation infrastructure to make traveling as a pedestrian or bicyclist more comfortable and convenient. The project team categorized the key routes based on the motor vehicle traffic volumes they currently carry. Figure 3.01-1 shows the motor vehicle daily traffic volumes in vehicles per day (vpd) on many of the key routes.

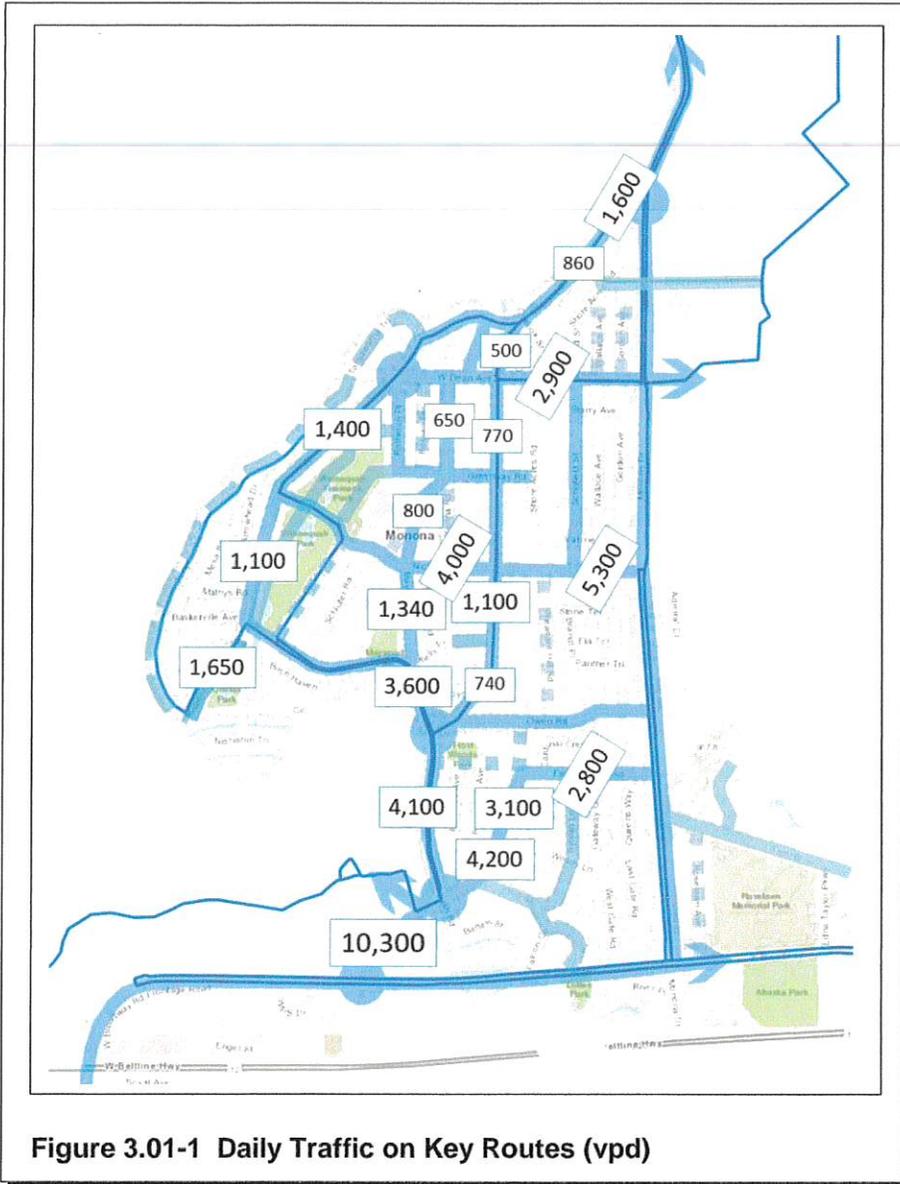
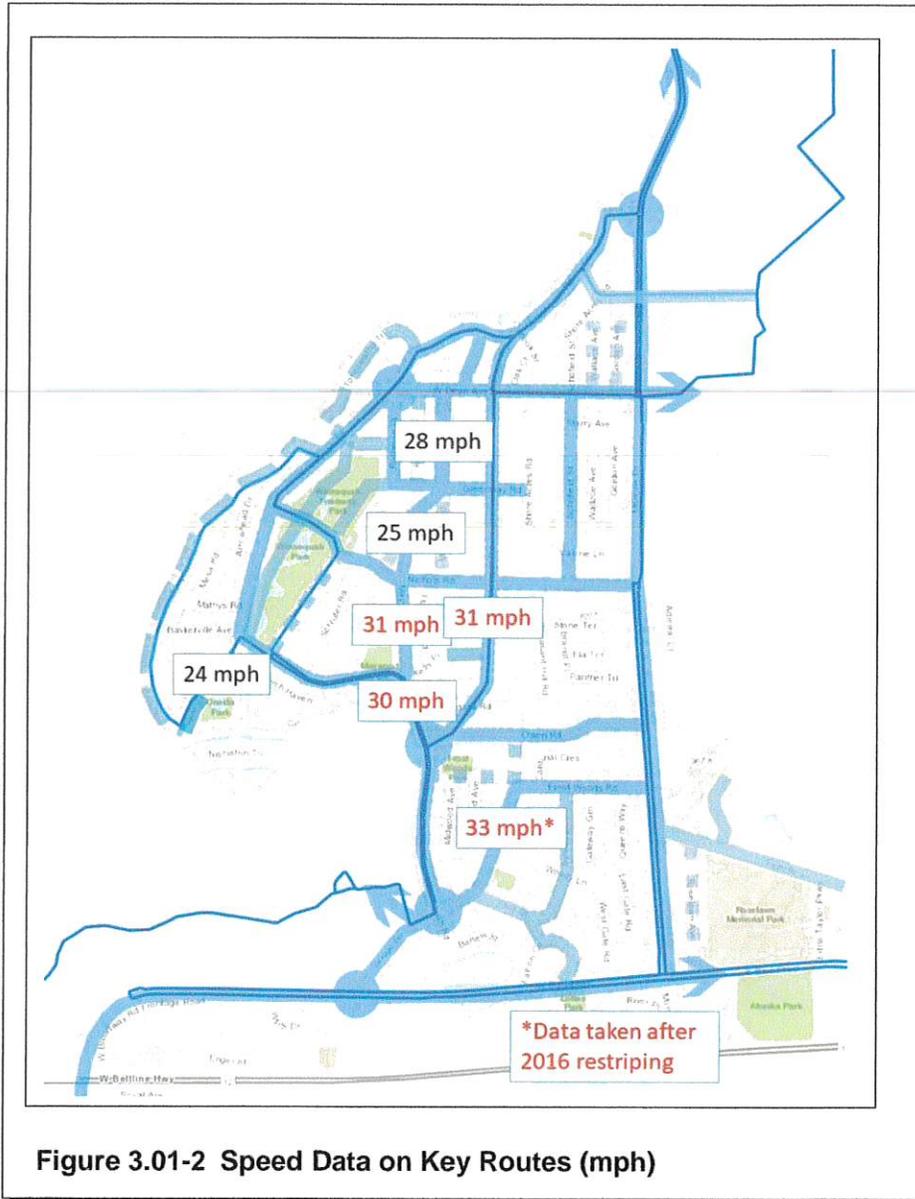


Figure 3.01-2 shows the currently available speed data on the key routes. The values shown are for the 85th percentile speeds.<sup>1</sup>



**Figure 3.01-2 Speed Data on Key Routes (mph)**

A. Typical Sections

The recommended configuration for pedestrians, bicyclists, and motor vehicles and the dimensions of each feature make up the typical section. Roadways with low motor vehicle traffic volumes and low

<sup>1</sup> The 85th percentile speed is the speed that 85 percent of the vehicles travel at or below. In other words, only 15 percent of the vehicles exceed the 85th percentile speed. This is a benchmark commonly used in traffic engineering.



# CONNECTING THE REGION

## A Newsletter from the Greater Madison MPO

### ARTICLES

Madison Region Remote Work Survey: COVID-19 Impact

COVID-19 Impacts Regional Traffic

Big Data Helps MPO Understand Travel Patterns in the Greater Madison Area

Refinements to East-West Bus Rapid Transit Considered

DRAFT 2021-2025 Transportation Improvement Program Available for Review and Comment

Regional Transportation Plan Update

CARPC: Planning for Future Development in the Capitol Region

### Introducing the Greater Madison MPO

#### *Connecting People, Places & Opportunities*

You may have noticed that something's changed... as the newly minted Greater Madison MPO (formerly Madison Area Transportation Planning Board), we are excited to share the results of our recent rebranding!

We initiated this process as a big step toward improving public awareness and understanding of the MPO's role and resources within the region. The results and feedback we gathered will help us draw better connections to the everyday things that people value most, and will inform our approach to future engagement processes such as the Regional Transportation Plan update that will begin in early 2021.

As part of the rebrand, we also defined a forward-thinking mission and vision to guide our work in the region, and teamed with the Capital Area Regional Planning Commission to further connect our two regional planning agencies with coordinated brands.

Finally, our transportation options program, Rideshare Etc., received an exciting facelift and will be introduced publicly as RoundTrip in 2021.

We are grateful to everyone who assisted us in this journey and we look forward to bringing our new identity to life in the coming weeks and months. We updated our website and Facebook page to reflect the new MPO name and logo, and additional improvements are planned for the future.

### Greater Madison MPO's COVID-19 Response

Like many organizations, the MPO office remains closed to the public due to COVID-19. Our staff will continue to work remotely part- or full-time to help protect the health of our community, and we are committed to providing the same dependable level of service that you are accustomed to. While our phones are monitored, the best way to reach us during this time is via email. If you have any questions or requests, please visit our [staff page](#) for a complete list of contact information.

After an initial interruption, we will also continue to maintain our Policy Board, Technical Coordinating Committee, and Citizen Advisory Committee schedules. These meetings will be held on Zoom throughout the pandemic. Schedules and agendas are posted on the [calendar page](#) of our website and on our [Facebook page](#). Agendas will provide information about how to register to join virtually, and how to provide a comment if desired.

### ABOUT US

#### Greater Madison MPO

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Madison, Wisconsin 53703

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[www.GreaterMadisonMPO.org](http://www.GreaterMadisonMPO.org)

Like us on  
Facebook:



@GreaterMadisonMPO

# Madison Region Remote Work Survey

## COVID-19 Impact

In response to the unprecedented circumstances of COVID-19, the Greater Madison MPO conducted a three-week online survey between June 9-30 to assess the effect of the pandemic on remote work trends and attitudes in the Madison region. The goal of the survey was to understand the unique implications of COVID-19 for workplace structure and commuter transportation trends, and to identify opportunities to connect area employers and employees with the tools needed to support the long-term adoption of remote work as a sustainable commute option.

Results from the survey will inform the MPO's transportation options program, Rideshare, Etc., which connects individuals and employers in the Madison region with convenient alternatives to driving alone in order to reduce vehicle miles traveled (VMT), congestion, and greenhouse gas emissions. This includes encouraging employers to offer remote work as an option, and working with regional partners to support this mission. Results will also provide local insights to help employers and organizations in the region make decisions about the future.

MPO staff worked with partners including CARPC, MadREP, the Greater Madison Chamber of Commerce, Latino Chamber of Commerce of Dane County, Madison Black Chamber of Commerce, and UW Small Business Development Center to refine the draft survey, as well as many others who helped distribute it through local municipal and organizational contact lists.

The survey received 1,881 responses, of which 73% are employees, 16% are managers, and 11% are executives. Organizations included both public and private employers, with sizes ranging from fewer than ten staff to over ten thousand. Many of the respondents (38%) work in downtown Madison, but home locations are dispersed throughout the county and beyond.

Prior to COVID-19, 78% of respondents never worked from home, and 83% of executives and managers did not supervise employees working remotely. In contrast, 80% of all respondents worked from home at least one day per week during the height of the pandemic, defined for this survey as March 25 – May 26, 2020; 64% worked from home full-time.

The survey found that although COVID-19 initiated a crash course in remote work for most employers and employees in the Madison region, the overall work experience has been positive. As a result, significant demand exists among employees for remote work to continue as an option into the future. Of all respondents, 79% would like to continue working from home at least one day per week after business returns to normal, and 69% say they will view an employer more favorably in the future if given the option to work from home. These results are consistent with findings from national surveys.

Encouragingly, 69% of executives and managers in the Madison region now anticipate that more employees will work from home periodically when business returns to normal, and 27% anticipate that more employees will work from home nearly full-time.

While concerns about employee productivity and effective management have been some of the primary historic barriers to wider adoption of remote work, the survey found that since COVID-19, 65% of executives and

## Impact of Remote Work on VMT and Air Quality

A recent analysis by Streetlight found that if commuters in Seattle worked from home just one to two days per week, the benefit would be a nearly 5% decrease in emissions.

Similarly, an analysis of workplace data and trends conducted by KPMG Automotive Group in June 2020 estimates that 10 to 20 percent of the U.S. workforce could permanently switch to remote work, contributing to a 9.2 percent long-term reduction in annual VMT when coupled with a greater reliance on e-commerce.

Sources:

Government Technology, June 2020 ([link here](#))

KPMG Automotive Group, June 2020 ([link here](#))

## After business returns to normal:

**79%** of respondents would like to continue working from home at least one day per week

**69%** say they will view an employer more favorably if given the option to work from home

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“If you had asked before the pandemic, my response would be that [work from home] isn’t possible. I now know it is possible, it can work, and there are benefits. There are also some challenges, but they are manageable.”

– Survey respondent

managers in the region believe their workforce is 76–100% efficient when working remotely, and another 12% say that efficiency is better than ever. Similarly, 75% of employees felt the same or better about their personal job performance at the height of the outbreak, and 37% were more productive.

The greatest challenges of remote work identified by this survey reflect the findings of many other surveys from around the nation. They include: (1) lack of access to the necessary tools and resources to work effectively, including computer equipment, a quality office space, and reliable internet; (2) barriers to communication and collaboration among and between co-workers and managers; and (3) negative impacts to workplace culture and social connectivity, perhaps exacerbated by few respondents having access to virtual watercoolers and other employer-sponsored social opportunities.

The greatest benefits of remote work, which respondents reported more frequently than challenges, revolve around saving time and money, and converting these savings to positive pursuits. Of all respondents, 70% are saving money by not commuting; 57% are spending more time with family and friends; 54% have more time to sleep and do housework; and slightly over one third are being more productive at work, exercising more, and eating healthier. Other top benefits include reduced stress and greater comfort while working from home, as well as feelings of greater satisfaction with personal job performance and life overall.

These results indicate that employers have an incredibly unique opportunity to take advantage of lessons learned from COVID-19 by focusing their efforts in three main areas. These include: (1) creating a company culture and flexible workplace model that support a variety of workplace preferences and needs; (2) ensuring that the right tools and resources are in place for employees to thrive both professionally and personally in a hybrid workplace; and (3) maintaining open communication to continually learn from missteps and build upon successes.

For agencies and organizations that work with employers, the survey highlights key resources desired by employees, managers, and executives to make remote work easier and more effective. By connecting employers and employees with the right knowledge, guidance, and opportunities, we can build upon the valuable new awareness generated by the unexpected circumstances of COVID-19, and continue to forge a sustainable and successful path forward for transportation and quality of life in our region.

## COVID-19 Impacts Regional Traffic

Traffic volumes dropped dramatically throughout Dane County earlier this year as the county’s stay-at-home order went into effect in late March, and retail/service businesses closed to mitigate the spread of COVID-19. The decrease was especially noticeable during the morning and afternoon peak commute periods on arterial roads such as the Beltline and East Washington Avenue, which would normally experience significant congestion.

How much did traffic volumes actually decrease during the stay-at-home order, and how much have volumes recovered since then? MPO staff used StreetLight Data, a travel analytics service providing access to “big data”, to answer these questions (see related article). MPO staff evaluated: (1) the change in total estimated daily vehicle miles of travel (VMT) generated by residents of Dane County; (2) the change in total estimated daily commercial

truck VMT (medium and heavy-duty) for travel that began, ended, or passed through Dane County; and (3) the change in estimated daily traffic volumes at over 200 selected locations within the county, primarily on roadways that had an average weekday volume of over 10,000 before the pandemic.

Three time periods were selected: April 2019, April 2020 (during the stay-at-home order), and June 15 – July 15, 2020 (most recent data available).

StreetLight Data indicates that **total VMT generated by residents of Dane County dropped 40.1% during April 2020 compared to April 2019**. Medium-duty truck VMT decreased by a similar amount, 39.2%, while heavy-duty truck VMT dropped 34.1%.

VMT has since rebounded with the reopening of the economy, though with fewer jobs. Between June 15 and July 15, 2020, VMT generated by residents of Dane County increased to 98% of the April 2019 level, while medium-duty and heavy-duty truck VMT increased to 93.9% and 88.1% of their April 2019 levels, respectively.

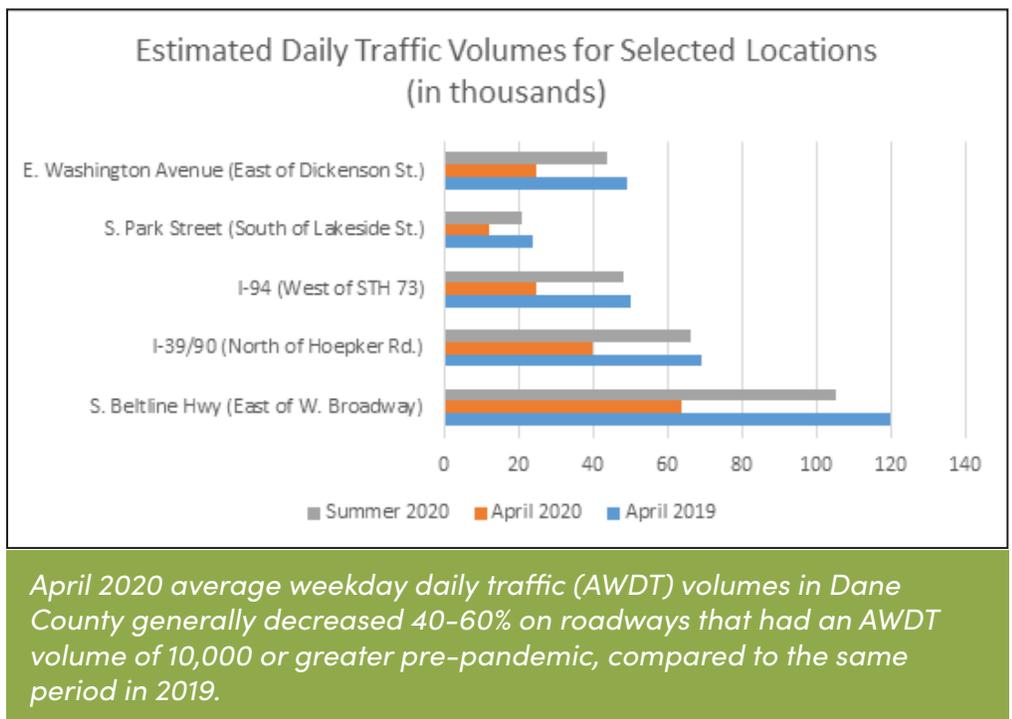
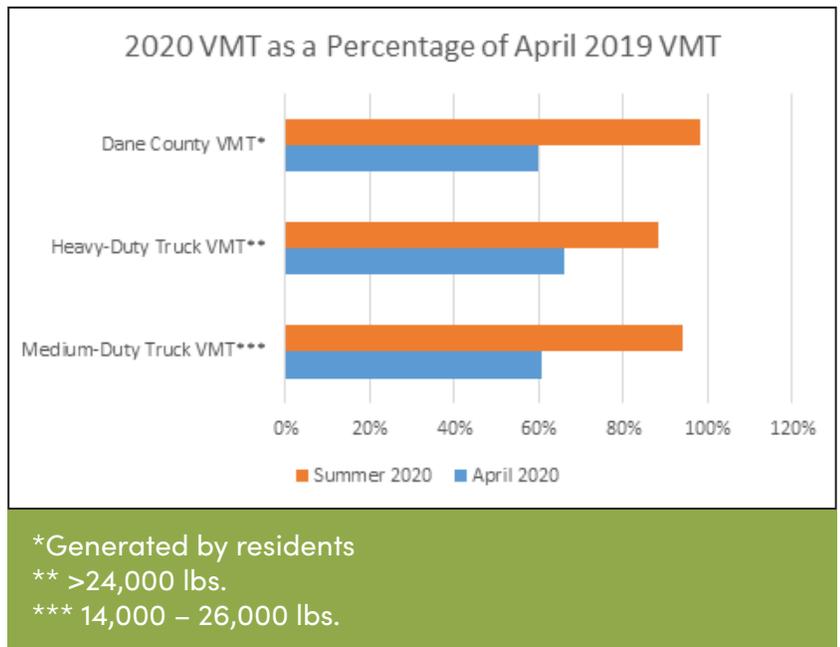
Although there are seasonal factors that affect VMT from month to month affecting the comparison between spring and summer data, it is clear that resident and truck VMT have mostly recovered now.

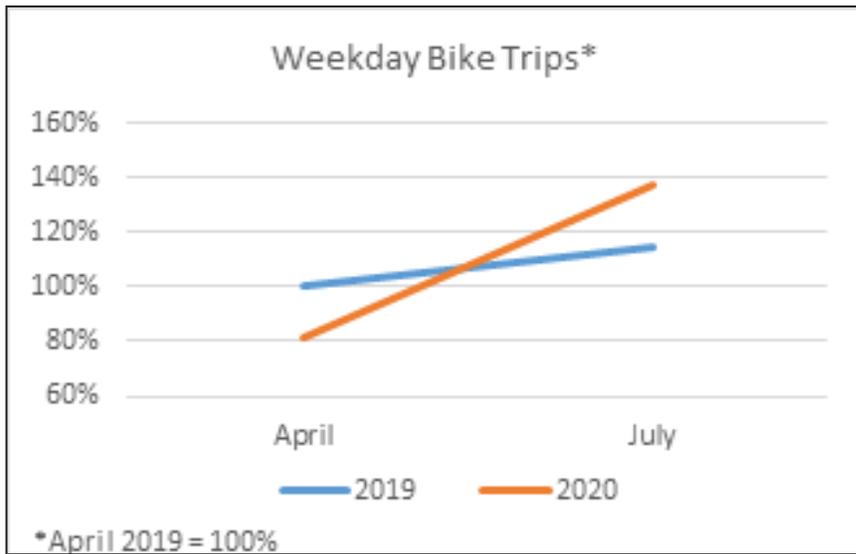
April 2020 average weekday daily traffic (AWDT) volumes in Dane County generally decreased 40-60% on roadways that had an AWDT volume of 10,000 or greater pre-pandemic, compared to the same period in 2019. AWDT volumes have since rebounded, and were generally 80-95% of their April 2019 levels during the June 15-July 15 period.

Peak period travel demand does not appear to have rebounded by the same amount, indicating that travel is now distributed more evenly throughout the day due to a shift in travel behavior such as more telecommuting.

Further study is warranted. The chart to the right shows the change in AWDT volumes over the three time periods for selected locations in Dane County.

Bicycle travel was similarly affected by COVID-19. As shown on the next page, weekday bike trips in April were down about 20% in 2020 compared to 2019. By July, however, they were substantially higher than 2019 levels.





While the overall number of weekday bike trips increased in July 2020 compared to July 2019, these trips were less concentrated spatially. In July 2019, the four zones that cover Library Square Mall, UW Hospital, Camp Randall Stadium, and Henry Vilas Zoo each accounted for 1.1% – 1.6% of Dane County weekday bike trips; in July 2020, these zones accounted for 0.3% – 0.9% of weekday bike trips.

Weekend bike trips in April and July 2020 exceeded those in April and July 2019 by 15% and 23% respectively, indicating more recreational bicycling.

## Big Data Helps MPO Understand Travel Patterns in the Greater Madison Area

Last year, the MPO began working with StreetLight Data, a company that processes location information from mobile phones and navigation devices – a type of “big data” – into useful data that can be used to answer a wide variety of questions about how, when, and where people travel.

The mobile phone data is the primary source of information about passenger car, bicycle, and pedestrian trips, while data from in-vehicle navigation devices is the main source of information about commercial vehicle trips and vehicle speeds. Streetlight plans to have transit trip data available by the end of 2020.

The mobile phone data comes from signals sent by location-based services (LBS) smart phone applications to determine the phone’s location. LBS signals allow StreetLight to much more accurately determine location than signals to and from cellular towers, which were the primary source of this type of data until several years ago.

The data is anonymized before Streetlight acquires it, so data records cannot be traced to any individual person or household. The data is made available for analysis on its interactive web based platform.

The MPO is using this valuable new tool to support a variety of planning activities, including:

- » **Dane County Bicycle Map:** traffic estimates were a key factor in determining the bike suitability of roadways, particularly those without actual counts.
- » **Regional travel forecast model update and improvements (ongoing):** origin-destination analyses are being used for model calibration and validation. Bicycle volumes may be used as well.
- » **Dane County Climate Action Plan:** average vehicle-miles traveled (VMT) per household by census tract helps to quantify how travel behavior varies across the metro area and county,

The data that Streetlight processes represents close to **30% of the population**. Streetlight then normalizes the data to represent the whole population.

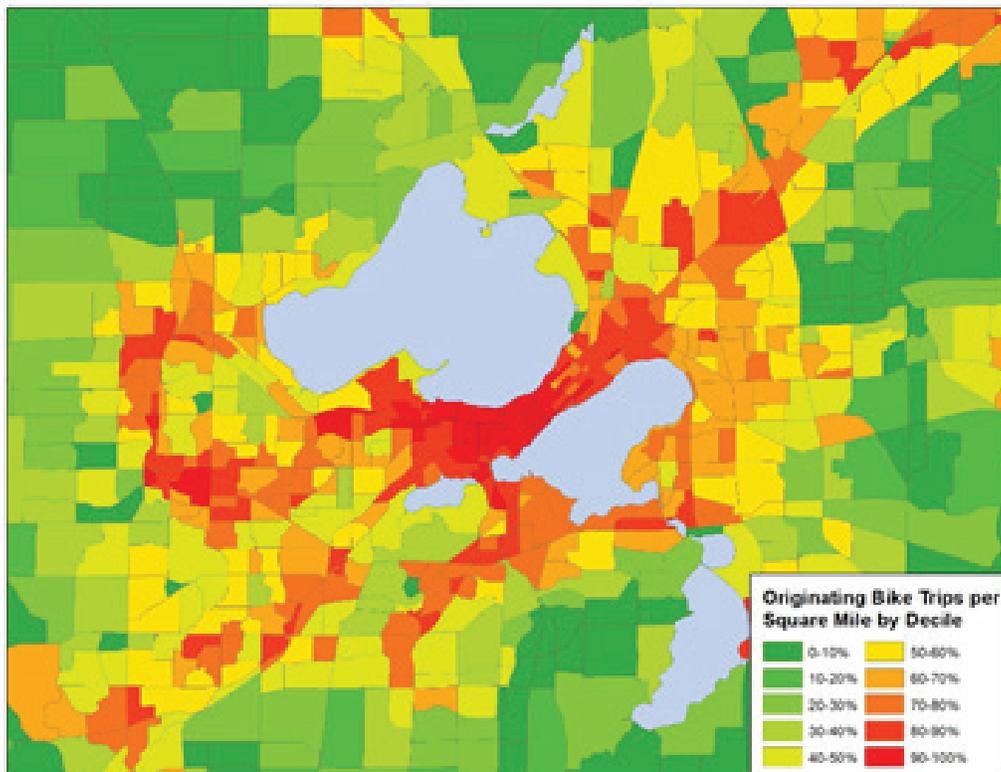
To assess the accuracy of the data, **MPO staff compared StreetLight traffic volume estimates to continuous traffic counts** from the Wisconsin Department of Transportation and City of Madison, and found them extremely well aligned.

and assess progress going forward in achieving plan goals. This information can also be used to inform CARPC's Regional Development Guide and local land use plans.

- » **Congestion management:** roadway segment estimates of traffic congestion can help highlight key chokepoints.
- » **Environmental justice (EJ) analyses:** better understanding the travel behavior of people living in EJ priority areas is critical to assessing how well vulnerable populations are served by transit and the bicycle network.
- » **Bicycle and pedestrian planning:** the amount of available bicycle and pedestrian travel data is now expanding to enable the MPO to better understand bicycle and pedestrian travel patterns, key routes, and network gaps.
- » **Assessing COVID-19 impacts on travel:** MPO staff has begun to analyze the impact of COVID-19 on travel behavior and roadway volumes (see separate article). Because Streetlight Data updates its platform with recent travel data every couple of months, staff will be able monitor travel changes moving forward as COVID-19 is addressed and the economy begins to recover.

The map below shows bike trips per square mile originating in Dane County in 2018, by decile. Zones shown in red are among the 10% of zones with the highest level of originating bike trips. Unsurprisingly, the downtown and campus areas, along with major shopping destinations, show the highest level of bike activity.

Without the use of "big data," such as that provided by StreetLight, it would be virtually impossible to gather the data needed for this type of analysis.



## Dane County Bicycle Map 2020

The Dane County Bicycle Map is a cooperative project between the MPO and Dane County. For the 2020 edition, MPO staff updated the road and multi-use path networks, and reviewed and adjusted the bicycle suitability ratings for area roadways, using data obtained through our StreetLight Data subscription to determine traffic volumes on roads where counts have not been conducted (see Big Data article, above).

Map text was translated into Spanish by the City of Madison Department of Civil Rights Language Assistance Program, **making this the first bilingual bicycle map published in Dane County** – and possibly the state! Also new in 2020 is a color-coded map of the County Bicycle Trail network indicating where a State Trail Pass is required.

Maps have been delivered by volunteers to area bicycle shops and mailed by request to agencies and organizations. To request a mailing of up to 25 maps, or to schedule a pick-up of a larger quantity of maps, please email [blyman@cityofmadison.com](mailto:blyman@cityofmadison.com).

[Click here](#) to view, download, and print the map, or view other MPO bicycle map resources.

# Refinements to East-West Bus Rapid Transit Considered as Project Moves Forward

The City of Madison's East-West Bus Rapid Transit (BRT) project achieved important milestones over the spring and summer. The City Council selected the Locally Preferred Alternative (LPA) and the project was accepted into Project Development-- necessary steps toward securing funding from the Federal Transit Administration (FTA) Small Starts program.

Some previously planned expenses, such as bus purchases and the development of electric bus charging capacity, will be designated BRT-related as appropriate. This enables those costs to be counted as non-Small Starts funding, although they may come from federal funding programs.

The MPO Policy Board amended the fiscally-constrained Regional Transportation Plan to include BRT and the satellite bus maintenance facility. The City of Madison submitted a request for project rating to FTA for Small Starts in late August. The rating must be Medium overall for a project to be considered for funding. There are two components to the project rating:

Project Justification, which includes anticipated ridership and for which Madison is expected to score Medium; and Local Financial Commitment, for which Madison is expected to score Medium High based on the city's current commitment of funds and planned 50% match.

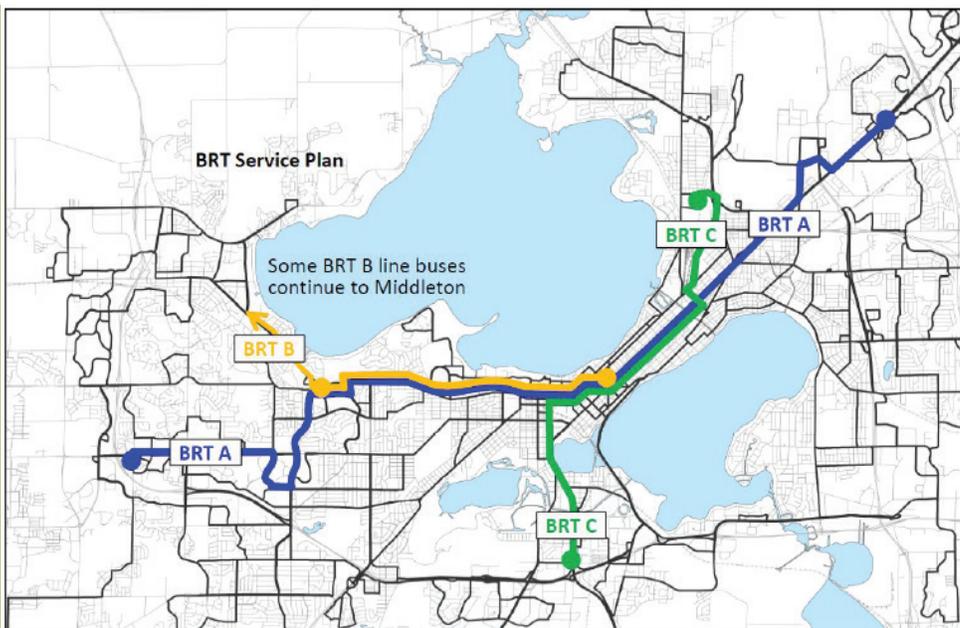
As a result of continued planning and in light of COVID-19 impacts to traffic and budgets, the City of Madison is now considering refinements to the project design. One entails three overlapping BRT routes, with local service continuing past the core East-West BRT corridor into Middleton, and another BRT

route connecting to the North and South Transfer Points (minus infrastructure improvements initially) (see map on left).

Another potential change would be to use a center-running (vs. curb side) alignment on portions of East Washington Avenue and Mineral Point Road. Median- or center-running BRT has the advantage of eliminating conflicts with right-turning vehicles and bicyclists, but adds restrictions on left-turning traffic and would require eliminating bike lanes in these corridors.

Other refinements under consideration include: relocating the eastern terminus off of the East Towne Mall property; eliminating the extension of Rosa Road through the UW Research Park; bypassing the Stoughton Road/ East Washington Avenue intersection with a new bus-only connection to Mendota Street; and relocating several stops along the corridor.

A public meeting is planned for October 22. More information is available at [www.cityofmadison.com/metro/routes-schedules/bus-rapid-transit](http://www.cityofmadison.com/metro/routes-schedules/bus-rapid-transit).



# Draft 2021-2025 Transportation Improvement Program Available for Review and Comment

The [Draft 2021-2025 Transportation Improvement Program \(TIP\) for the Madison Metropolitan Area & Dane County](#) is now available for review and comment. The TIP lists major transportation improvements and studies with approved or committed funding during the next five-year period. The Greater Madison MPO must approve all projects with federal funding and/or that are regionally significant, including those selected or programmed by implementing agencies such as WisDOT and Metro Transit. As part of the TIP process, the MPO ensures coordination of projects amongst implementing agencies and consistency of projects with the Regional Transportation Plan.

The MPO receives its own allocation of federal funding under two federal highway programs: Surface Transportation Block Grant (STBG) Urban and Transportation Alternatives (TA). The MPO solicits applications and selects projects for funding under these programs every two years. Last year, the MPO awarded federal STBG Urban funding to three roadway projects. The construction schedules for these projects were finalized earlier this year and cost estimates updated. They are:

- » **County Trunk Highway (CTH) M** (Oncken Rd. to Willow Rd.): Reconstruction and expansion to four lanes with on and –off street bicycle facilities (construction in 2023 – 2024).
- » **Pleasant View Road – Phase 1** (USH 14 to Timber Wolf Tr.): Reconstruction and expansion to four lanes with sidewalk and on- and off-street bicycle facilities (construction in 2023).
- » **Exchange Street** (Farwell St. to Sleepy Hollow Rd.): Reconstruction (construction in 2024).

This year the MPO awarded federal STBG TA program funds to the following bicycle projects, to be implemented or constructed in 2022-23.

- » **Dane County Safe Routes to School Program:** County-wide program that includes targeted support to schools with a high proportion of students qualifying for free/reduced price lunches. Program will be implemented by the Wis. Bike Federation.
- » **West Main Street** (Proudfit St. to Fairchild St.): Corridor bike improvements, including design elements to slow speeds, bike lanes in selected locations, and Rectangular Rapid Flashing Beacon signal at the crossing of Proudfit Street.
- » **West Towne Path Extension** (Commerce Park Drive to Ice Age Junction Path): Construct shared-use path connecting to current path segment from S. High Point Road to Commerce Drive. One remaining gap from West Towne to High Point Road will exist.
- » **Commercial Avenue Path** (S. Bird St. to Kroncke Dr.): Resurface and widen path on north side of street. Path connects low-income housing to a middle school and to a new path connecting to Sun Prairie East High School.
- » **DeForest Safe Routes School Path** (Holum St./North Towne Rd. to Yorktown Rd.): Construct new path filling missing links in the

## Cycle September Bike Challenge

This year, the MPO engaged Love to Ride to run two regional bicycle challenges on the **Love to Ride Madison** platform, joining a network of Love to Ride challenge communities around the nation and world.

Due to COVID-19, the first planned challenge in May was postponed to 2021.

Cycle September was then organized around a new message, “Bike Anywhere, Anytime,” and **over 580 participants from 52 organizations in the Madison area are now participating!** A special element of Cycle September is that businesses and organizations can create personalized team pages, which goes the extra mile (pun intended!), to create a sense of community that encourages new and occasional riders to join.

Cycle September was organized in partnership with **Madison Bike Week**, and includes many **#PedalForGood** promotions **focused on giving back to our community.**

## Cycle September

THE GLOBAL BIKE CHALLENGE



lovetoride.net/madison

village bike network and connecting the middle and high schools.

The MPO also receives an allocation of federal funding under a federal transit program (Section 5310) that funds projects providing enhanced services beyond ADA requirements for the elderly and persons with disabilities. The projects proposed to be funded in 2021 include:

- » Continuation of Dane County's one-call center and mobility training and bus buddy programs.
- » Continued funding of Madison Metro's paratransit eligibility & mobility coordination program, which conducts in-person paratransit eligibility assessments and provides travel training.
- » Purchase of an accessible vehicle by Capital Express, a private shared-ride non-emergency medical transportation provider.
- » Purchase of an accessible vehicle by the City of Stoughton for its shared-ride taxi fleet.

## Regional Transportation Plan Update

MPO staff have begun to prepare for the update to the Regional Transportation Plan (RTP) 2050. The MPO is coordinating the update with the Capital Area Regional Planning Commission's (CARPC) update of the Regional Development Guide (RDG). The RDG is anticipated to be completed by the end of 2021, while the RTP is anticipated to be completed by spring 2022. The major tasks being completed this year include:

- » Working with a consultant to update and improve the MPO's regional travel forecast model;
- » Working with CARPC, City of Madison, and other local staff and officials on updated household and employment forecasts (interim year 2035 and 2050), which are a key input to the travel model; and
- » Updating the federally required MPO Congestion Management Process, which lays out the process, performance measures, and monitoring to be done to manage congestion and maximize safety and mobility consistent with other goals.

The travel model will be updated to a new 2016 base year, using data from a regional household travel survey and other data, including origin/destination data from Streetlight, a big data provider (see related article). A number of improvements are being made to the model. These include:

- » Improving its sensitivity to land use/place type in forecasting travel, including trips generated, distribution, and choice of travel mode;
- » Improving the accuracy of forecast distribution of trips (i.e., where people travel) by accounting for the accessibility of destinations by different travel modes (rather than just auto travel time) as well as the land use/place type of areas;
- » Adding a bicycle network categorized by "level of traffic stress" and forecasting bicycle trips along with motor vehicle, transit, and

pedestrian trips;

- » Incorporating intersection delay into trip assignment (i.e., routing) on the roadway network; and
- » Improving the accuracy of “external” trips (i.e., to/from outside the county and through the county).

The county population forecast is anticipated to be significantly higher than the one used for RTP 2050, based on growth trends since the last projections by the WI Dept. of Administration Demographic Services Center in 2013. A preliminary forecast puts the population increase at nearly 200,000 to 739,000 in 2050. The employment forecast is also anticipated to be higher than that used previously.

Public engagement activities associated with the RTP update will begin in early 2021. Look for more information in our next newsletter!

## CARPC CORNER

### Planning for Future Development in the Capital Region

As part of our commitment to increased collaboration, the Greater Madison MPO and the [Capital Area Regional Planning Commission](#) (CARPC) have aligned our long-term regional planning efforts. While the MPO has begun updating the Regional Transportation Plan, CARPC is simultaneously engaged in preparing a regional development framework.

CARPC is charged under state statute to “prepare and adopt a master plan for the physical development of the region.” Such an advisory plan is needed to guide future development in our fast-growing region, which expects to welcome more than 180,000 additional people over the next 30 years. The existing regional plan, Vision 2020: Dane County Land Use and Transportation Plan, is now past its useful life and due for a major update.

The regional development framework that CARPC is working on now will fulfill the statutory requirement and serve as a guide for local public and private entities to achieve the desired balance of physical development and preservation in the Dane County region. The framework’s goals and recommendations are intended to be incorporated into the plans and policies of local governments, community organizations, and businesses, aligning them with shared regional objectives.

Last year, CARPC began the update process by developing and refining [goals and objectives](#). CARPC drew on the findings of the [A Greater Madison Vision](#) (AGMV) initiative to establish three overarching goals for the region: fostering community resilience to climate change; increasing access to jobs, housing, and services for all people; and conserving farmland, water resources and natural areas. These goals and their related objectives were then revised based on [feedback from local government officials](#).

CARPC’s recent plan update activities have included completing a participation plan, launching a Technical Advisory Committee, and drafting regional population, household, and employment projections. As planning continues, CARPC will explore growth concepts in local plans and other regions, and prepare draft regional development frameworks and maps. Staff will also prepare and solicit input on indicators for each regional development objective, providing a way to measure progress.

For those interested in learning more about the framework and overall update process, CARPC regularly shares planning updates on our [website](#) and [Facebook page](#), in our [monthly newsletter](#), and at our [Commission meetings](#). We invite feedback and collaboration, and look forward to creating a meaningful, useful, and successful roadmap for the future of our region.

# 2021 CAPITAL BUDGET AMENDMENT

No. 21-08

ACCOUNT NUMBER				ACCOUNT NAME	BUDGET PRIOR TO CHANGE	INCREASE	DECREASE	AMENDED BUDGET
FUND	CC	Acct#	Obj					
2021				Public Works Tree replacement	\$ 25,000	\$ 10,000	\$ -	\$ 35,000
				Total Amendment		<u>\$ 10,000</u>	<u>\$ -</u>	

Description      To increase Public Works tree replacement program by \$ 10,000

Sponsored by:                      Alders Moore and Wood