



136 North Monroe Street  
Waterloo, WI 53594  
Phone: (920) 478-3025  
Fax: (920) 478-2021  
[www.waterloowi.us](http://www.waterloowi.us)

**CITY OF WATERLOO COUNCIL AGENDA**  
**COUNCIL CHAMBER OF THE MUNICIPAL BUILDING – 136 N. MONROE STREET**  
**July 20, 2023 7pm**

Pursuant to Section 19.84 Wisconsin Statutes, notice is hereby given to the public and news media, that a public meeting will be held to consider the following:

- 1) CALL TO ORDER, PLEDGE OF ALLEGIANCE AND ROLL CALL
- 2) MEETING MINUTES APPROVAL: July 6, 2023
- 3) CITIZEN INPUT / PUBLIC COMMENT (3-Minute time limit)
- 4) OLD BUSINESS
- 5) MEETING SUMMARIES (since last Council meeting)
  - a) 07/11/2023 Waterloo Water & Light Commission
  - b) 07/18/2023 CDA
  - c) 07/20/2023 Finance, Insurance & Personnel Committee
- 6) CONSENT AGENDA ITEMS
  - a) May Reports of City Officials & Contract Service Providers
    - i) Parks
    - ii) Fire & Emergency Medical Services
    - iii) Building Inspections
    - iv) Public Works
    - v) Police
    - vi) Library Board
    - vii) Water & Light Utility Commission
    - viii) Watertown Humane Society
    - ix) Waterloo Cable Board
- 7) RECOMMENDATIONS OF BOARDS, COMMITTEES AND COMMISSIONS
  - a) Finance, Insurance and Personnel
    - i) June 2023 Financial Statements: Payroll \$135,699.28, General Disbursements \$227,252.54 and Clerk/Treasurer's Reports [\[see on municipal website\]](#)
    - ii) Waterloo Fire Department – Repairs to Water Truck Rails
  - b) Waterloo Water & Light
    - i) Town & Country Construction Update
    - ii) Contractor's Application for Payment-Waterloo Utilities
    - iii) City of Waterloo Project Tracking Budget and Funding Allocations for Wastewater Remodel.
    - iv) Update Ordinance 340-2 D. (2) Water & Light Utility Commission
- 8) NEW BUSINESS
  - a) Senior Housing Study
  - b) Class A Beer, Liquor & Cider License Applications Along with A Class C Wine Application – Tobacco license for The License Period 7/1/2023 – 6/30/2024 Handspot
  - c) Appointing Charles Kuhl to the Plan Commission to replace vacancy left by Petts
  - d) Resolution 2023-24 Awarding Pavement Maintenance Contract to Thunder Road LLC, Genesee, WI
  - e) Ward 4 & 5 Appointment of Alderperson to Fill Council Vacancy . [NOTE: The City Council may meet in closed session per Wis. Stat. 19.85(1)(c) "considering employment, promotion, compensation or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercise responsibility. Upon concluding a closed session, the Committee will reconvene in open session.
- 9) FUTURE AGENDA ITEMS AND ANNOUNCEMENTS –

## 10) ADJOURNMENT

Jeanne Ritter Clerk/Deputy Treasurer

Posted & Emailed: 07/13/2023.

PLEASE NOTE: It is possible that members of and possibly a quorum of members of other governmental bodies of the municipality may be in attendance at the above meeting(s) to gather information. No action will be taken by any governmental body other than that specifically noted. Also, upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids and services. For additional information or to request such services please contact the clerk's office at the above location

**CITY OF WATERLOO COMMON COUNCIL - MEETING MINUTES: July 6, 2023**

[a digital recording of this meeting also serves as the official record]

- 1) CALL TO ORDER, PLEDGE OF ALLEGIANCE & ROLL CALL. Mayor Quimby called the meeting to order at 7:02 p.m. Alderpersons present: A. Kuhl, C. Kuhl, Griffin, Thomas, Weihert, and Petts. Attending Remotely: none  
Absent: Cummings. Others attending in-person: Police Chief D. Sorenson; DPW Director Yerges; Waterloo Utilities Superintendent B. Sorenson; J. Haseleu, Clerk Jeanne Ritter; and WLOO Videographers. The pledge of allegiance was recited.
- 2) MEETING MINUTES APPROVAL: June 15, 2023 [C. Kuhl/A.Kuhl] VOICE VOTE: Motion Carried.
- 3) CITIZEN INPUT / PUBLIC COMMENT none
- 4) OLD BUSINESS - none
- 5) MEETING SUMMARIES (since last Council meeting)
  - a) 06/20/2023 CDA
  - b) 06/26/2023 Fire/EMS Meeting
  - c) 06/27/2023 Library Board Meeting
  - d) 06/27/2023 Plan Commission Meeting – Cancelled
  - e) 07/06/2023 Public Safety & Health
  - f) 07/06/2023 Cable Television Board Meeting
  - g) 07/06/2023 Public Works Meeting
- 6) NEW BUSINESS
  - a) Proclamation Commending Jeanette Petts on her Years of Service to The City of Waterloo.
- 7) RECOMMENDATIONS OF BOARDS, COMMITTEES AND COMMISSIONS
  - a) Public Safety Committee
    - i) Hiring Full Time Police Officer Kyle Stormoen will start July 17, 2023 Motion [Thomas/Petts] VOICE VOTE: Motion carried.
  - b) Public Works and Property Committee
    - i) Vanguard Proposal for Marking Public Works Diggers Hotline Requests. City to pay for ¼ of billing charges from GLS Utility. Motion [Weihert/Petts] ROLL CALL: Ayes 6 Noes 0 Cummings absent. Motion carried.
    - ii) Bobcat Purchase DPW to purchase with extra funds from other projects. [Weihert/Griffin] ROLL CALL: Ayes 6 Noes 0 Cummings absent. Motion carried.
- 8) FUTURE AGENDA ITEMS AND ANNOUNCEMENTS
- 9) ADJOURNMENT [C. Kuhl/Griffin] VOICE VOTE: Motion carried. 7:20 pm

Attest:

Jeanne Ritter Clerk/Deputy Treasurer



WATERLOO FIRE & RESCUE  
900 INDUSTRIAL LANE  
WATERLOO, WISCONSIN 53594



Sunday July 9<sup>th</sup>, 2023

On Monday June 5<sup>th</sup>, 2023 we had our monthly Operators training. Training was on aerial operations and placement. Practice placement and operations in know diminished areas. This is to ensure that if something happens in these certain areas, we know how to set it up in a quick response to preserve life and property.

On Monday June 12<sup>th</sup>, 2023 we had our monthly EMS training. Training was with our Medical Director Dr. CJ. Main focus was on strokes. How to complete an assessment due to it could be mild or a major stroke. Where is the best facilities to take a possible stroke patient and what are interventions we should take for these patients.

On Monday June 19<sup>th</sup>, 2023 we had our monthly Fire training. Training was on water flow and relay pumping with a tender. We practiced stretching lines and then tested how many lines we could utilize when relay pumping from a tender to the engine. This will give us 4000 to 5000 gallons of water right away.

Sincerely,

Chief Wesley Benisch  
Waterloo Fire Department  
900 Industrial Ln.  
Waterloo WI 53594  
920-478-2535  
[chief@waterloowi.us](mailto:chief@waterloowi.us)





**WATERLOO FIRE & RESCUE**  
**900 INDUSTRIAL LANE**  
**WATERLOO, WISCONSIN 53594**



Department Activity Report – June  
 Call Report for the month of June

**EMS Calls:**

|  |    |
|--|----|
| City of Waterloo   | 35 |
| Township of Waterloo   | 1  |
| Township of Portland   | 2  |
| 2 <sup>nd</sup> out EMS Unit City of Waterloo Mutual Aid from Marshall EMS | 1  |
| Mutual Aid for Watertown   | 1  |

**Total EMS 40**

**EMS & Fire Motor Vehicle Crash Calls:**

|                  |   |
|------------------|---|
| City of Waterloo | 0 |
|------------------|---|

**Total MVC 0**

**Alarms:**

|                  |   |
|------------------|---|
| City of Waterloo | 1 |
|------------------|---|

**Fire Calls:**

|                              |   |
|------------------------------|---|
| City of Waterloo             | 1 |
| Town of Portland             | 1 |
| Town of Milford              | 1 |
| Mutual Aid for Marshall      | 1 |
| Mutual Aid for Cambridge     | 1 |
| Mutual Aid for Johnson Creek | 1 |
| Mutual Aid for Lake Mills    | 1 |

**Hazardous Condition:**

|                  |   |
|------------------|---|
| City of Waterloo | 1 |
| Town of Portland | 1 |
| Town of Waterloo | 1 |
| Town of Milford  | 1 |

**Weather Related Call:**

|                        |   |
|------------------------|---|
| Waterloo Fire District | 0 |
|------------------------|---|

**Service Calls:**

|                  |   |
|------------------|---|
| City of Waterloo | 3 |
|------------------|---|

**Rescue Calls:**

|                     |   |
|---------------------|---|
| Township of Shields | 0 |
|---------------------|---|

**Total Fire 14**

**June Total 54**

**Up to Date Call Totals**

|  |     |
|--|-----|
| Fire (Structure, Wild land, Motor Vehicle) | 26  |
| Rescue/EMS: BLS - 88 ALS - 35              | 180 |
| Hazardous Conditions (No Fire)             | 5   |
| False Alarm or Call                        | 7   |
| Motor Vehicle Crash                        | 4   |
| Service Calls                              | 23  |
| Rescue Calls                               | 0   |
| Weather Related Calls                      | 1   |

**Up to Date Total 246**

**Fire Mutual Aid Given 17 Fire Mutual Aid Received 0**

**2<sup>nd</sup> Out Unit 5 EMS Mutual Aid Given 7 EMS Mutual Aid Received 4 Paramedic Intercept 0**

**Total Personnel Response: 811 (for the month): 160**

Monthly Response Time (EMS Incidents) **194** (From 1<sup>st</sup> page to enroute times) average **4.8** min (for the month)

Minutes Spent Responding **107** (Enroute time to on scene time) average **2.6** min (for the month)

Monthly Response Time (FIRE Incidents) **53** (From 1<sup>st</sup> page to enroute times) average **3.7** min (for the month)

Minutes Spent Responding **33** (Enroute time to on scene time) average **2.3** min (for the month)

Waterloo Fire Rescue Calls per area 2023

City of Waterloo

|         | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov   | Dec |
|---------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|-----|
| Fire    | 1   | 1   | 0   | 1   | 1   | 1   |     |     |     |     |       |     |
| EMS     | 26  | 21  | 25  | 19  | 25  | 36  |     |     |     |     |       |     |
| Hazards | 1   | 1   | 0   | 0   | 0   | 1   |     |     |     |     |       |     |
| Alarm   | 1   | 1   | 0   | 2   | 2   | 1   |     |     |     |     |       |     |
| Crash   | 0   | 0   | 1   | 1   | 1   | 0   |     |     |     |     |       |     |
| Service | 3   | 4   | 3   | 3   | 4   | 3   |     |     |     |     |       |     |
| Rescue  | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
|         |     |     |     |     |     |     |     |     |     |     | Total | 190 |

Township of Waterloo

|         | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov   | Dec |
|---------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|-----|
| Fire    | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| EMS     | 2   | 0   | 0   | 4   | 1   | 1   |     |     |     |     |       |     |
| Hazards | 0   | 0   | 0   | 0   | 0   | 1   |     |     |     |     |       |     |
| Alarm   | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Crash   | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Service | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Rescue  | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
|         |     |     |     |     |     |     |     |     |     |     | Total | 9   |

Township of Portland

|         | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov   | Dec |
|---------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|-----|
| Fire    | 0   | 0   | 1   | 1   | 0   | 1   |     |     |     |     |       |     |
| EMS     | 2   | 3   | 3   | 1   | 1   | 2   |     |     |     |     |       |     |
| EMS EX  | -   | -   | -   | -   | -   | -   |     |     |     |     |       |     |
| Hazards | 0   | 0   | 0   | 0   | 0   | 1   |     |     |     |     |       |     |
| Alarm   | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Crash   | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Service | 0   | 0   | 2   | 1   | 0   | 0   |     |     |     |     |       |     |
| Rescue  | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
|         |     |     |     |     |     |     |     |     |     |     | Total | 19  |

Waterloo Fire Rescue Calls per area 2022

Township of Shields

|         | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov   | Dec |
|---------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|-----|
| Fire    | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| EMS     | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Hazards | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Alarm   | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Crash   | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Service | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Rescue  | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
|         |     |     |     |     |     |     |     |     |     |     | Total | 0   |

Township of Milford

|         | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov   | Dec |
|---------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|-----|
| Fire    | 0   | 0   | 0   | 0   | 0   | 1   |     |     |     |     |       |     |
| EMS     | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Hazards | 0   | 0   | 0   | 0   | 0   | 1   |     |     |     |     |       |     |
| Alarm   | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Crash   | 1   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Service | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
| Rescue  | 0   | 0   | 0   | 0   | 0   | 0   |     |     |     |     |       |     |
|         |     |     |     |     |     |     |     |     |     |     | Total | 3   |



## Invoice

Invoice Number: 0101410-IN

Invoice Date: 06/30/23

Terms: Net 30 Days

Due Date: 07/30/23

Salesperson: 0000

Customer Number: 11-WATERL2

Customer P.O.:

96906

CITY OF WATERLOO  
136 N MONROE STREET  
Waterloo, WI 53594-1198

| Fee Type                              | Amount Paid                                 | Paid Date | % Due to 3rd Party | Amount Due to 3rd Party               |
|---------------------------------------|---|-----------|--------------------|---------------------------------------|
| <b>Permit # 23WTRC-0057-23-06E</b>    | 200 Anna Street, Waterloo, WI 53594         |           |                    | <b>Electrical Permit - Commercial</b> |
| Electrical- Replacement & Misc. Item  | 100.00                                      | 06/02/23  | 60.00              | 60.00                                 |
| <b>23WTRC-0057-23-06E Subtotal</b>    |   |           |                    | <b>60.00</b>                          |
| <b>Permit # 23WTRC-0058-23-06H</b>    | 1061 Jill's Court, Waterloo, WI 53594       |           |                    | <b>HVAC Permit</b>                    |
| HVAC- Replacement & Misc. Items-      | 130.00                                      | 06/01/23  | 60.00              | 78.00                                 |
| <b>23WTRC-0058-23-06H Subtotal</b>    |   |           |                    | <b>78.00</b>                          |
| <b>Permit # 23WTRC-0059-23-06H</b>    | 434 West Polk Street, Waterloo, WI 53594    |           |                    | <b>HVAC Permit</b>                    |
| HVAC- Replacement & Misc. Items-      | 60.00                                       | 06/01/23  | 60.00              | 36.00                                 |
| <b>23WTRC-0059-23-06H Subtotal</b>    |   |           |                    | <b>36.00</b>                          |
| <b>Permit # 23WTRC-0060-23-06BEPH</b> | 401 Hendricks Street, Waterloo, WI 53594    |           |                    | <b>Commercial Addition</b>            |
| HVAC- New Building/Additon/Alterat    | 277.40                                      | 06/05/23  | 60.00              | 166.44                                |
| Electrical- New Building/Additon/Alte | 277.40                                      | 06/05/23  | 60.00              | 166.44                                |
| Plumbing- New Building/Addition/Alt   | 277.40                                      | 06/05/23  | 60.00              | 166.44                                |
| Commerical New Structure/Addition     | 815.43                                      | 06/05/23  | 60.00              | 489.26                                |
| <b>23WTRC-0060-23-06BEPH Subtotal</b> |   |           |                    | <b>988.58</b>                         |
| <b>Permit # 23WTRC-0061-23-06E</b>    | 336 Harrison Street, Waterloo, WI 53594     |           |                    | <b>Electrical Permit</b>              |
| Electrical- Replacement & Misc. Item  | 50.00                                       | 06/08/23  | 60.00              | 30.00                                 |
| <b>23WTRC-0061-23-06E Subtotal</b>    |   |           |                    | <b>30.00</b>                          |
| <b>Permit # 23WTRC-0062-23-06B</b>    | 520 McKay Way, Waterloo, WI 53594           |           |                    | <b>Deck</b>                           |
| Accessory Structure- Residential      | 60.00                                       | 06/08/23  | 60.00              | 36.00                                 |
| <b>23WTRC-0062-23-06B Subtotal</b>    |   |           |                    | <b>36.00</b>                          |
| <b>Permit # 23WTRC-0063-23-06E</b>    | 122 South Monroe Street, Waterloo, WI 53594 |           |                    | <b>Electrical Permit - Commercial</b> |
| Electrical- Replacement & Misc. Item  | 55.00                                       | 06/08/23  | 60.00              | 33.00                                 |
| <b>23WTRC-0063-23-06E Subtotal</b>    |   |           |                    | <b>33.00</b>                          |
| <b>Permit # 23WTRC-0064-23-06B</b>    | 575 Van Buren Street, Waterloo, WI 53594    |           |                    | <b>Fence</b>                          |
| Other Fee- Residential                | 50.00                                       | 06/08/23  | 60.00              | 30.00                                 |
| <b>23WTRC-0064-23-06B Subtotal</b>    |   |           |                    | <b>30.00</b>                          |
| <b>Permit # 23WTRC-0065-23-06B</b>    | 1232 Chestnut Street, Waterloo, WI 53594    |           |                    | <b>Fence</b>                          |
| Other Fee- Residential                | 50.00                                       | 06/13/23  | 60.00              | 30.00                                 |

Continued



| Fee Type                              | Amount Paid  | Paid Date | % Due to 3rd Party | Amount Due to 3rd Party               |
|---------------------------------------|--|-----------|--------------------|---------------------------------------|
| <b>23WTRC-0065-23-06B Subtotal</b>    |  |           |                    | <b>30.00</b>                          |
| <b>Permit # 23WTRC-0066-23-06B</b>    | <b>111 Anna Street, Waterloo, WI 53594</b>         |           |                    | <b>Commercial Alteration</b>          |
| Remodel- Commercial                   | 770.00   | 06/15/23  | 60.00              | 462.00                                |
| <b>23WTRC-0066-23-06B Subtotal</b>    |  |           |                    | <b>462.00</b>                         |
| <b>Permit # 23WTRC-0067-23-06H</b>    | <b>131 Minnetonka Way, Waterloo, WI 53594</b>      |           |                    | <b>HVAC Permit</b>                    |
| HVAC- Replacement & Misc. Items-      | 190.00   | 06/15/23  | 60.00              | 114.00                                |
| <b>23WTRC-0067-23-06H Subtotal</b>    |  |           |                    | <b>114.00</b>                         |
| <b>Permit # 23WTRC-0068-23-06H</b>    | <b>813 North Monroe Street, Waterloo, WI 53594</b> |           |                    | <b>HVAC Permit - Commercial</b>       |
| HVAC- Replacement & Misc. Items-      | 400.00   | 06/22/23  | 60.00              | 240.00                                |
| <b>23WTRC-0068-23-06H Subtotal</b>    |  |           |                    | <b>240.00</b>                         |
| <b>Permit # 23WTRC-0069-23-06B</b>    | <b>527 Pierce Street, Waterloo, WI 53594</b>       |           |                    | <b>Fence</b>                          |
| Other Fee- Residential                | 50.00  | 06/22/23  | 60.00              | 30.00                                 |
| <b>23WTRC-0069-23-06B Subtotal</b>    |  |           |                    | <b>30.00</b>                          |
| <b>Permit # 23WTRC-0070-23-06BEP</b>  | <b>127 Van Buren Street, Waterloo, WI 53594</b>    |           |                    | <b>Residential Alteration</b>         |
| Electrical- Replacement & Misc. Item  | 50.00  | 06/22/23  | 60.00              | 30.00                                 |
| Plumbing- Replacement & Misc. Item    | 50.00  | 06/22/23  | 60.00              | 30.00                                 |
| Remodel- Residential                  | 85.00  | 06/22/23  | 60.00              | 51.00                                 |
| <b>23WTRC-0070-23-06BEP Subtotal</b>  |  |           |                    | <b>111.00</b>                         |
| <b>Permit # 23WTRC-0071-23-06B</b>    | <b>355 McKay Way, Waterloo, WI 53594</b>           |           |                    | <b>Deck</b>                           |
| Accessory Structure- Residential      | 60.00  | 06/27/23  | 60.00              | 36.00                                 |
| <b>23WTRC-0071-23-06B Subtotal</b>    |  |           |                    | <b>36.00</b>                          |
| <b>Permit # 23WTRC-0072-23-06B</b>    | <b>1095 Goehl Road, Waterloo, WI 53594</b>         |           |                    | <b>Fence</b>                          |
| Other Fee- Residential                | 50.00  | 06/27/23  | 60.00              | 30.00                                 |
| <b>23WTRC-0072-23-06B Subtotal</b>    |  |           |                    | <b>30.00</b>                          |
| <b>Permit # 23WTRC-0073-23-06H</b>    | <b>1221 Oak Street, Waterloo, WI 53594</b>         |           |                    | <b>HVAC Permit</b>                    |
| HVAC- Replacement & Misc. Items-      | 44.75  | 06/29/23  | 60.00              | 26.85                                 |
| <b>23WTRC-0073-23-06H Subtotal</b>    |  |           |                    | <b>26.85</b>                          |
| <b>Permit # 23WTRC-0074-23-06ES</b>   | <b>703 West Madison Street, Waterloo, WI 53594</b> |           |                    | <b>Early Start (Commercial Misc./</b> |
| Early Start Permit- Commercial        | 165.00   | 06/29/23  | 60.00              | 99.00                                 |
| Erosion Control- Commercial           | 350.00   | 06/29/23  | 60.00              | 210.00                                |
| <b>23WTRC-0074-23-06ES Subtotal</b>   |  |           |                    | <b>309.00</b>                         |
| <b>Permit # 23WTRC-0075-23-06B</b>    | <b>100 McKay Way, Waterloo, WI 53594</b>           |           |                    | <b>Fence</b>                          |
| Other Fee- Residential                | 50.00  | 06/29/23  | 60.00              | 30.00                                 |
| <b>23WTRC-0075-23-06B Subtotal</b>    |  |           |                    | <b>30.00</b>                          |
| <b>Permit # 23WTRC-0076-23-06BEPH</b> | <b>360 McKay Way, Waterloo, WI 53594</b>           |           |                    | <b>Residential Alteration</b>         |
| HVAC- Replacement & Misc. Items-      | 50.00  | 06/29/23  | 60.00              | 30.00                                 |
| Plumbing- Replacement & Misc. Item    | 50.00  | 06/29/23  | 60.00              | 30.00                                 |
| Electrical- Replacement & Misc. Item  | 122.00   | 06/29/23  | 60.00              | 73.20                                 |

Continued



CITY OF WATERLOO

Invoice Number: 0101410-IN

Invoice Date: 06/30/23

Page: 3

| Fee Type                              | Amount Paid  | Paid Date | % Due to 3rd Party | Amount Due to 3rd Party               |
|---------------------------------------|--|-----------|--------------------|---------------------------------------|
| Remodel- Residential                  | 125.00   | 06/29/23  | 60.00              | 75.00                                 |
| <b>23WTRC-0076-23-06BEPH Subtotal</b> |  |           |                    | <b>208.20</b>                         |
| <b>Permit # 23WTRC-0077-23-06BEH</b>  | <b>555 Bradford Drive, Waterloo, WI 53594</b>      |           |                    | <b>Residential Alteration</b>         |
| Electrical- Replacement & Misc. Iten  | 50.00  | 06/29/23  | 60.00              | 30.00                                 |
| HVAC- Replacement & Misc. Items-      | 50.00  | 06/29/23  | 60.00              | 30.00                                 |
| Remodel- Residential                  | 100.00   | 06/29/23  | 60.00              | 60.00                                 |
| <b>23WTRC-0077-23-06BEH Subtotal</b>  |  |           |                    | <b>120.00</b>                         |
| <b>Permit # 23WTRC-PR00001</b>        | <b>703 West Madison Street, Waterloo, WI 53594</b> |           |                    | <b>PR Only - Delegated - BLDG - N</b> |
| Plan Entry Fee                        | 100.00   | 06/02/23  | 90.00              | 90.00                                 |
| Building Plan Review Fees             | 700.00   | 06/02/23  | 90.00              | 630.00                                |
| <b>23WTRC-PR00001 Subtotal</b>        |  |           |                    | <b>720.00</b>                         |

96906

| Summary Fee Type |                      |                 |
|------------------|----------------------|-----------------|
| ItemCode         | Description          | Amount          |
| /PERMITS         | Building Permits     | 3,038.63        |
| /PLAN REVIEW     | Plan Review Services | 720.00          |
| <b>Total</b>     |                      | <b>3,758.63</b> |

Please remit to: SAFEbuilt LLC Lockbox #88135  
PO Box 88135, Chicago, IL 60680-1135

|                       |                 |
|-----------------------|-----------------|
| Net Invoice:          | 3,758.63        |
| Freight:              | 0.00            |
| Sales Tax:            | 0.00            |
| <b>Invoice Total:</b> | <b>3,758.63</b> |

| MONTHLY TIME REPORT DPW   |         | JUNE |      |       |        |
|---------------------------|---------|------|------|-------|--------|
| 2023                      |         | Chad | Jeff | Chris | Travis |
| JOB                       |         |      |      |       |        |
| Police Admin              |         | 2    | 0    | 0     | 0      |
| Fire Dept                 |         | 0    | 3    | 0     | 2      |
| Mach/Equip                |         | 5    | 18   | 21    | 5      |
| Garage/Shed               |         | 17   | 3    | 23.5  | 33     |
| Meeting/Seminars          |         | 10   | 0    | 2     | 0      |
| Street Repair/Maintenance |         | 24.5 | 6    | 6     | 0      |
| Street Cleaning           |         | 0    | 0    | 0     | 18     |
| Snow & Ice                | Reg Hrs | 0    | 0    | 0     | 0      |
|                           | OT Hrs  | 1    | 0    | 0     | 0      |
| Storm Sewer               |         | 28   | 3    | 9     | 0      |
| Traffic Control           |         | 11   | 15   | 50    | 10     |
| Bridges/Culvers           |         | 0    | 0    | 0     | 0      |
| Tree/Brush                |         | 3    | 32   | 9.5   | 40.5   |
| Refuse Collection         |         | 7    | 10   | 13    | 11     |
| Sanitary Sewer            |         | 0    | 2    | 2     | 0      |
| Insect Control            |         | 0    | 0    | 0     | 0      |
| Animal Control            |         | 0    | 1    | 0     | 0.5    |
| Cemetary                  |         | 0    | 7    | 0     | 6      |
| Library                   |         | 0    | 1    | 1.75  | 0      |
| Firemans Park             |         | 24   | 10   | 21    | 1      |
| Other Parks               |         | 7    | 23   | 0     | 17.5   |
| Trail Head                |         | 0    | 2    | 0     | 3.5    |
| Celeb/Enter               |         | 3    | 0    | 5     | 0      |
| Weed Control              |         | 2    | 7    | 0     | 16     |
| Vac/Holiday/SL            |         | 31   | 24   | 10    | 6      |

**Bi-Annual Building Inspections/Reporting**

Roof, Windows, Doors, Mechanicals, Grounds

City Hall

Maunsha Building Center

Municipal Band Stand

Library

Fire Department

Firemen's Park (mulitple)

Trailhead Facility

DPW (mulitple)



# Machinery and Equipment Maintenance

2023

JUNE

| DPW Equipment                     | 2023   | Mileage / Hours |       |       | TTL Fuel | GPH     |
|-----------------------------------|--------|-----------------|-------|-------|----------|---------|
|                                   |        | Start           | End   | Total |          |         |
| End loader                        | 544    | 4340            | 4345  | 5     | 0        | #DIV/0! |
| John Deere Tractor                | 2555   | 4908            | 4913  | 5     | 0        | #DIV/0! |
| Wood Chipper                      | 200XP  | 9               | 16    | 7     | 29.978   | 0.23    |
| John Deere Lawn Tractor           | 1025   | 340             | 340   | 0     | 56.798   | 0.25    |
| John Deere                        | X750-T | 156             | 162   | 6     | 56.798   | 0.25    |
| John Deere                        | X750-R | 140             | 148   | 8     | 56.798   | 0.25    |
| Wacker Roller                     |        | 438             | 438   | 0     | 0        | #DIV/0! |
| 2023 Frieghtliner Truck           | #8     | 1153            | 1245  | 92    | 20.916   | 4.40    |
| 2020 International Truck          | #2     | 7168            | 7242  | 74    | 14.421   | 5.13    |
| Paint Gator                       |        | 2037            | 2047  | 10    | 0        | #DIV/0! |
| 2017 Chevrolet Truck              | #4     | 59244           | 59959 | 715   | 54.24    | 13.18   |
| 2018 Frieghtliner Truck           | #5     | 13720           | 13760 | 40    | 0        | #DIV/0! |
| 2006 Elgin Pelican Street Sweeper |        | 43814           | 43858 | 44    | 22.445   | 1.96    |
| 2011 Ford F-550 Truck             | #6     | 45338           | 45681 | 343   | 86.987   | 3.94    |
| 2015 Frieghtliner Truck           | #7     | 16372           | 16374 | 2     | 0        | #DIV/0! |
| Bobcat Loader                     |        | 1023            | 1039  | 16    | 0        | #DIV/0! |

# WATERLOO POLICE DEPARTMENT OFFICER'S DAILY -JUNE

|                |       |
|----------------|-------|
| Patrol:        | 620.5 |
| Investigative: | 45    |
| Radar:         | 135.5 |
| Court:         |       |

|                  |       |
|------------------|-------|
| Office:          | 190   |
| Special:         | 7.5   |
| School/Training: | 52.00 |
| On Call:         |       |

Total Hours Worked: 1050.50

| COMPLAINTS               |           |
|--------------------------|-----------|
| Family:                  | 0         |
| Off Road Vehicles:       | 0         |
| Vandalism:               | 0         |
| Minor Theft - \$500:     | 0         |
| Major Theft + \$500:     | 2         |
| Burglary:                | 0         |
| Doors Found Open:        | 1         |
| Animal Case:             | 1         |
| Late Bar Closings:       | 0         |
| Alarms:                  | 0         |
| Loud Music/Parties:      | 3         |
| Tavern Complaints:       | 0         |
| Prowler Complaints:      | 3         |
| Battery to Person:       | 3         |
| Domestic Abuse:          | 0         |
| Sexual Assault:          | 0         |
| Runaways:                | 0         |
| Worthless Checks:        | 0         |
| All Other Complaints:    | 72        |
| <b>TOTAL COMPLAINTS:</b> | <b>85</b> |

| ACCIDENTS               |          |
|-------------------------|----------|
| More than \$1,000:      | 1        |
| Less than \$1,000:      | 0        |
| Pedestrian Accidents:   | 0        |
| Bicycle Accidents:      | 0        |
| Number Injured:         | 0        |
| Number Killed:          | 0        |
| <b>TOTAL ACCIDENTS:</b> | <b>1</b> |

| ASSISTS                  |            |
|--------------------------|------------|
| Assist Jefferson County: | 3          |
| Assist Dodge County:     | 2          |
| Assist Dane County:      | 0          |
| Assist Marshall PD:      | 2          |
| Assist Fire/Rescue:      | 45         |
| Assist Other Agencies:   | 6          |
| Assist Public:           | 21         |
| Assist With Escort:      | 4          |
| Assist All Others:       | 6          |
| <b>TOTAL ASSISTS:</b>    | <b>178</b> |

| MISCELLANEOUS             |             |
|---------------------------|-------------|
| Personal Contacts:        | 1445        |
| Investigations/Follow-up: | 20          |
| Traffic Control:          | 11          |
| Radar Operations:         | 210         |
| Special Assignment:       | 4           |
| Speech/Presentation:      | 0           |
| Serve Papers:             | 0           |
| Other Miscellaneous:      | 0           |
| <b>TOTAL:</b>             | <b>1690</b> |

| INQUIRIES/CHECKS        |          |
|-------------------------|----------|
| Registration Checks:    | 255      |
| D.L. Checks:            | 239      |
| NCIC/CIB/VIN Checks:    | 0        |
| Check Welfare:          | 6        |
| <b>TOTAL INQUIRIES:</b> | <b>0</b> |

|                           | Warnings  | Arrests   |
|---------------------------|-----------|-----------|
| Speeding:                 | 23        | 1         |
| Too Fast For Conditions:  | 0         | 0         |
| Inattentive Driving:      | 0         | 0         |
| Failure to Yield:         | 0         | 2         |
| Stop Sign Violation:      | 3         | 1         |
| Illegal Passing:          | 0         | 0         |
| No Driver's License:      | 0         | 3         |
| Illegal Parking:          | 2         | 39        |
| Left of Highway:          | 0         | 0         |
| Drunk Driving:            | 0         | 0         |
| Unregistered Vehicle:     | 0         | 0         |
| Driving While Sus/Rev:    | 2         | 3         |
| Hit And Run:              | 0         | 0         |
| Off Road Vehicle:         | 0         | 0         |
| Power Display:            | 4         | 0         |
| Equipment:                | 1         | 0         |
| Illegal "U" Turn:         | 1         | 0         |
| Following Too Close:      | 0         | 0         |
| Seatbelt Violation:       | 0         | 0         |
| <b>ALL OTHER TRAFFIC:</b> | <b>24</b> | <b>3</b>  |
| <b>TOTAL</b>              | <b>60</b> | <b>52</b> |

|                            |           |           |
|----------------------------|-----------|-----------|
| Disorderly Conduct:        | 1         | 3         |
| Underage Alcohol:          | 0         | 0         |
| Warrants:                  | 0         | 0         |
| Theft:                     | 0         | 0         |
| Trespassing:               | 0         | 0         |
| Burglary/Break & Enter:    | 0         | 0         |
| Vandalism:                 | 0         | 0         |
| <b>ALL OTHER MIS/CRIM:</b> | <b>1</b>  | <b>3</b>  |
| <b>TOTALS:</b>             | <b>62</b> | <b>58</b> |

# Waterloo Police Department Fleet Maintenance Report

|                     |                   |
|---------------------|-------------------|
| VIN                 | 1FM5K8ABOLGB673   |
| Year                | 2020              |
| Vehicle Description | Ford Edge Utility |

|                  |          |
|------------------|----------|
| For Period       | 6/1-6/30 |
| Fuel Cost        | \$172.92 |
| Miles per gallon | 15.10    |

| Date      | Fuel   | Fuel Cost       | Odometer Begin | Maintenance Item | Officer |
|-----------|--------|-----------------|----------------|------------------|---------|
| 6/1/2023  | 11.337 | \$21.81         | 13200          |                  | 7       |
| 6/16/2023 | 12.379 | \$42.08         | 14462          |                  | 2       |
| 6/16/2023 | 8.21   | \$27.91         | 14733          |                  | 16      |
| 6/17/2023 | 8.354  | \$28.40         | 14808          |                  | 7       |
| 6/18/2023 | 8.133  | \$26.83         | 14888          |                  | 12      |
| 6/23/2023 | 7.848  | \$25.89         | 15637          |                  | 8       |
|           | 56.261 | <b>\$172.92</b> |                |                  |         |

# Waterloo Police Department Fleet Maintenance Report

|                     |                   |
|---------------------|-------------------|
| VIN                 | 1FM5K8AR4FGC07739 |
| Year                | 2021              |
| Vehicle Description | Ford EXPLORER     |

|                  |          |
|------------------|----------|
| For Period       | 6/1-6/30 |
| Fuel Cost        | \$641.89 |
| Miles per gallon | 15.70    |

| Date      | Fuel  | Fuel Costs      | Mileage | Maintenance Items            | Main. Cost | Officer |
|-----------|-------|-----------------|---------|------------------------------|------------|---------|
| 6/1/2023  | 6.232 | \$21.81         | 13551   |                              |            | 7       |
| 6/2/2023  | 7.47  | 26.14           | 13618   |                              |            | 7       |
| 6/3/2023  | 9.166 | \$31.16         | 13705   |                              |            | 8       |
| 6/4/2023  | 8.478 | \$27.97         | 13804   |                              |            | 8       |
| 6/5/2023  | 7.997 | \$29.68         | 13880   |                              |            | 8       |
| 6/5/2023  | 4.769 | \$16.21         | 13926   |                              |            | 7       |
| 6/6/2023  | 8.581 | \$30.02         | 14000   |                              |            | 11      |
| 6/7/2023  | 8.337 | \$30.00         | 14088   |                              |            | 11      |
| 6/8/2023  | 7.223 | \$26.00         | 14157   |                              |            | 11      |
| 6/9/2023  | 6.696 | \$24.10         | 14227   |                              |            | 7       |
| 6/10/2023 | 8.336 | \$30.00         | 14307   |                              |            | 11      |
| 6/13/2023 | 7.233 | \$24.58         | 14429   |                              |            | 8       |
| 6/14/2023 | 11.08 | \$38.79         | 14527   |                              |            | 17      |
| 6/14/2023 |       |                 | 14633   | oil change, lub, oil, filter | \$37.91    |         |
| 6/15/2023 | 6.1   | \$20.75         | 14646   |                              |            | 7       |
| 6/16/2023 | 8.21  |                 | 14733   |                              |            | 16      |
| 6/17/2023 | 8.354 | \$28.40         | 14808   |                              |            | 7       |
| 6/18/2023 | 8.133 | \$26.83         | 14888   |                              |            | 12      |
| 6/20/2023 | 9.053 | \$29.87         | 15002   |                              |            | 8       |
| 6/21/2023 | 8.29  | \$31.43         | 15073   |                              |            | 17      |
| 6/24/2023 | 8.899 | \$30.25         | 15122   |                              |            | 10      |
| 6/25/2023 | 8.533 | \$29.00         | 15415   |                              |            | 11      |
| 6/27/2023 | 7.395 | \$23.66         | 15574   |                              |            | 12      |
| 8/29/2023 | 8.445 | \$28.00         | 15663   |                              |            | 8       |
| 6/30/2023 | 4.04  | \$13.34         | 15816   |                              |            | 17      |
| 6/30/2023 | 7.246 | \$23.90         | 15773   |                              |            | 10      |
|           |       | <b>\$641.89</b> |         |                              |            |         |



## Monthly Incident Comparison Report

## Report Criteria:

Current Month: 6/2023

| Category    | Description                             | Current Month | Prior Month | Year To Date | Same Mo. Last Year | Last Year |
|-------------|---|---------------|-------------|--------------|--------------------|-----------|
| No Category |   |               |             |              |                    |           |
|             | Assist Watertown Police Department      | 0             | 0           | 0            | 0                  | 1         |
|             | Assist citizen                          | 0             | 0           | 0            | 0                  | 1         |
|             | Blank Description                       | 0             | 0           | 0            | 0                  | 0         |
|             | assist human services                   | 0             | 0           | 0            | 0                  | 1         |
|             | <b>Total for No Category:</b>           | <b>0</b>      | <b>0</b>    | <b>0</b>     | <b>0</b>           | <b>3</b>  |
| ASSIST      |   |               |             |              |                    |           |
|             | Assist Business                         | 0             | 0           | 0            | 0                  | 2         |
|             | Assist Citizen                          | 0             | 0           | 8            | 2                  | 21        |
|             | Assist Dane County Sheriff              | 0             | 1           | 1            | 0                  | 2         |
|             | Assist Dodge County Sheriff             | 0             | 0           | 2            | 1                  | 12        |
|             | Assist Jefferson County Sheriff         | 2             | 2           | 6            | 1                  | 11        |
|             | Assist Marshall PD                      | 0             | 2           | 6            | 2                  | 20        |
|             | Assist Motorist                         | 0             | 0           | 0            | 0                  | 1         |
|             | Assist Social Services                  | 4             | 0           | 8            | 2                  | 19        |
|             | Assist/School District                  | 0             | 0           | 0            | 0                  | 1         |
|             | Civil Dispute                           | 1             | 0           | 1            | 0                  | 0         |
|             | Custody for Other Department            | 0             | 1           | 3            | 0                  | 0         |
|             | EMS Calls                               | 0             | 0           | 2            | 0                  | 4         |
|             | Fire Calls                              | 0             | 1           | 1            | 0                  | 3         |
|             | Neighbor Problems                       | 0             | 0           | 0            | 1                  | 1         |
|             | Other Mutual Aid Assists                | 1             | 0           | 2            | 0                  | 1         |
|             | <b>Total for ASSIST:</b>                | <b>8</b>      | <b>7</b>    | <b>40</b>    | <b>9</b>           | <b>98</b> |
| CRIMINAL    |   |               |             |              |                    |           |
|             | Abuse of Elderly/Vulnerable             | 0             | 0           | 0            | 0                  | 1         |
|             | Aggravated/Substantial Battery          | 0             | 0           | 0            | 0                  | 1         |
|             | Bail Jumping/Escapes                    | 0             | 0           | 0            | 0                  | 4         |
|             | Battery to Police Officer/Fireman       | 0             | 0           | 0            | 0                  | 1         |
|             | Burglary - Non-Residential/Forced       | 0             | 0           | 0            | 0                  | 1         |
|             | Burglary - Residential/No Force         | 0             | 0           | 1            | 0                  | 0         |
|             | Child Enticement                        | 0             | 0           | 0            | 0                  | 1         |
|             | Computer Crimes                         | 0             | 0           | 0            | 0                  | 2         |
|             | Criminal Damage To Property/vandalism   | 1             | 1           | 3            | 0                  | 13        |
|             | Disorderly Conduct - All Other          | 1             | 2           | 7            | 0                  | 6         |
|             | Disorderly Conduct - Fight, Disturbance | 1             | 2           | 3            | 0                  | 2         |
|             | Domestic Disturbance                    | 0             | 0           | 9            | 0                  | 7         |
|             | Domestic Offense - Child Abuse/Neglect  | 0             | 0           | 1            | 0                  | 2         |
|             | Drug Investigations                     | 0             | 0           | 0            | 0                  | 3         |
|             | Drug Possession                         | 0             | 0           | 1            | 1                  | 4         |
|             | Fraud                                   | 0             | 0           | 4            | 0                  | 6         |
|             | Harassment - Harassing Telephone Calls  | 0             | 0           | 2            | 0                  | 1         |

## Monthly Incident Comparison Report

## Report Criteria:

Current Month: 6/2023

| Category  | Description                             | Current Month | Prior Month | Year To Date | Same Mo. Last Year | Last Year  |
|-----------|---|---------------|-------------|--------------|--------------------|------------|
| CRIMINAL  |   |               |             |              |                    |            |
|           | Harassment - Threats                    | 0             | 1           | 1            | 0                  | 7          |
|           | Interfere with Child Custody            | 0             | 0           | 0            | 0                  | 2          |
|           | Obstruct/Resist Police Officer          | 0             | 0           | 0            | 1                  | 2          |
|           | Operate Vehicle Without Owner's Consent | 0             | 0           | 0            | 0                  | 1          |
|           | Other Sex Offenses                      | 0             | 0           | 0            | 0                  | 6          |
|           | Other Weapon Violations                 | 0             | 0           | 1            | 0                  | 1          |
|           | Probation Hold                          | 1             | 0           | 1            | 0                  | 0          |
|           | Probation/Parole Violation              | 0             | 0           | 1            | 0                  | 1          |
|           | Simple Battery                          | 0             | 1           | 1            | 0                  | 1          |
|           | Suicide - Attempts/Threats              | 0             | 0           | 0            | 0                  | 2          |
|           | Theft - All Other                       | 1             | 3           | 6            | 1                  | 15         |
|           | Theft - Bicycles                        | 0             | 0           | 0            | 2                  | 3          |
|           | Theft - From Building                   | 0             | 0           | 0            | 0                  | 3          |
|           | Theft - Motor Vehicle Parts/Accessories | 0             | 0           | 0            | 0                  | 2          |
|           | Theft - Retail/Shoplifting              | 0             | 0           | 0            | 2                  | 4          |
|           | Trespassing                             | 0             | 0           | 2            | 2                  | 3          |
|           | Violation of Court/Restraining Order    | 0             | 1           | 1            | 0                  | 0          |
|           | <b>Total for CRIMINAL:</b>              | <b>5</b>      | <b>11</b>   | <b>45</b>    | <b>9</b>           | <b>108</b> |
| ORDINANCE |   |               |             |              |                    |            |
|           | Animal Bite                             | 0             | 0           | 2            | 1                  | 6          |
|           | Animal Running at Large                 | 0             | 0           | 1            | 0                  | 4          |
|           | Burning Violation                       | 0             | 0           | 0            | 0                  | 1          |
|           | Disturbance                             | 0             | 0           | 1            | 0                  | 3          |
|           | Harassment                              | 0             | 0           | 0            | 0                  | 1          |
|           | Loitering                               | 0             | 0           | 0            | 0                  | 1          |
|           | Municipal Code Violation                | 0             | 0           | 3            | 0                  | 2          |
|           | Possession of Tobacco by Minor          | 0             | 0           | 3            | 0                  | 1          |



## Monthly Incident Comparison Report

## Report Criteria:

Current Month: 6/2023

| Category  | Description                              | Current Month | Prior Month | Year To Date | Same Mo. Last Year | Last Year |
|-----------|--|---------------|-------------|--------------|--------------------|-----------|
| ORDINANCE |  |               |             |              |                    |           |
|           | Public Nuisance Violations               | 0             | 0           | 1            | 0                  | 0         |
|           | Truancy                                  | 0             | 0           | 2            | 0                  | 13        |
|           | Under Age Drinking - Adult (18-21)       | 0             | 0           | 0            | 0                  | 3         |
|           | Under Age Drinking - Minor (Under 18)    | 0             | 0           | 0            | 0                  | 1         |
|           | <b>Total for ORDINANCE:</b>              | <b>0</b>      | <b>0</b>    | <b>13</b>    | <b>1</b>           | <b>36</b> |
| Other     |  |               |             |              |                    |           |
|           | Investigation/Take Report                | 0             | 0           | 1            | 0                  | 0         |
|           | Other Animal Calls - Dead, Etc.          | 0             | 0           | 1            | 0                  | 4         |
|           | Receive Information                      | 1             | 4           | 15           | 1                  | 31        |
|           | <b>Total for Other:</b>                  | <b>1</b>      | <b>4</b>    | <b>17</b>    | <b>1</b>           | <b>35</b> |
| SERVICE   |  |               |             |              |                    |           |
|           | Death Investigation                      | 1             | 0           | 3            | 1                  | 8         |
|           | Emergency Detention/Detoxification       | 0             | 0           | 0            | 1                  | 2         |
|           | Found Items/Property                     | 0             | 1           | 1            | 2                  | 6         |
|           | Missing Adult                            | 0             | 0           | 0            | 0                  | 2         |
|           | Missing Juvenile                         | 0             | 0           | 0            | 0                  | 1         |
|           | Runaway Juvenile                         | 0             | 0           | 1            | 0                  | 1         |
|           | Suspicious Person/Activity, Prowler      | 1             | 0           | 1            | 0                  | 2         |
|           | Suspicious Vehicle                       | 0             | 0           | 0            | 1                  | 2         |
|           | Uncontrollable Adult                     | 0             | 0           | 0            | 0                  | 1         |
|           | Uncontrollable Juvenile                  | 0             | 0           | 1            | 0                  | 2         |
|           | Warrant Pickup - Other Agency            | 0             | 0           | 3            | 0                  | 8         |
|           | Welfare Check                            | 2             | 0           | 6            | 1                  | 10        |
|           | <b>Total for SERVICE:</b>                | <b>4</b>      | <b>1</b>    | <b>16</b>    | <b>6</b>           | <b>45</b> |
| TRAFFIC   |  |               |             |              |                    |           |
|           | Driver's License Violations (Ex OAS/OAR) | 4             | 3           | 14           | 4                  | 29        |
|           | Eluding Police Officer                   | 0             | 0           | 0            | 0                  | 1         |
|           | Illegal Turns                            | 0             | 0           | 3            | 0                  | 3         |
|           | Lane Violations - Left of Center, Etc.   | 0             | 0           | 0            | 0                  | 3         |
|           | License/Permit Violation                 | 1             | 1           | 3            | 0                  | 4         |
|           | Motor Vehicle Insurance Violation        | 0             | 1           | 4            | 0                  | 4         |
|           | OAS/OAR/Other License Violations         | 0             | 3           | 13           | 1                  | 35        |
|           | Open Intoxicants - Driver                | 0             | 0           | 0            | 0                  | 2         |
|           | Operate Motor Vehicle While Intoxicated  | 0             | 1           | 4            | 3                  | 18        |
|           | Other Traffic Violations                 | 0             | 0           | 0            | 0                  | 1         |
|           | Power Display/Squeal Tires               | 0             | 0           | 0            | 0                  | 1         |
|           | Registration/Title Violation             | 0             | 0           | 6            | 0                  | 1         |
|           | Right of Way Violation                   | 1             | 0           | 1            | 0                  | 0         |
|           | Seatbelt Violation                       | 0             | 2           | 3            | 0                  | 2         |
|           | Speeding Violation                       | 3             | 6           | 18           | 1                  | 20        |

Monthly Incident Comparison Report

Report Criteria:

Current Month: 6/2023

| Category | Description                             | Current Month | Prior Month | Year To Date | Same Mo. Last Year | Last Year  |
|----------|---|---------------|-------------|--------------|--------------------|------------|
| TRAFFIC  |   |               |             |              |                    |            |
|          | Stop Sign/Signal Violation              | 1             | 2           | 18           | 2                  | 26         |
|          | Tow Vehicle                             | 0             | 0           | 0            | 0                  | 4          |
|          | Traffic Accident - Hit and Run (Damage) | 1             | 0           | 4            | 0                  | 10         |
|          | Traffic Accident - Non-Reportable       | 0             | 0           | 1            | 0                  | 5          |
|          | Traffic Accident - Personal Injury      | 0             | 0           | 0            | 0                  | 4          |
|          | Traffic Accident - Property Damage      | 1             | 2           | 11           | 1                  | 24         |
|          | Vehicle Equipment Violation - Lights    | 0             | 0           | 0            | 0                  | 1          |
|          | Vehicle in Ditch/Off Road               | 0             | 0           | 0            | 0                  | 1          |
|          | <b>Total for TRAFFIC:</b>               | <b>12</b>     | <b>21</b>   | <b>103</b>   | <b>12</b>          | <b>199</b> |
|          | <b>Grand Totals:</b>                    | <b>30</b>     | <b>44</b>   | <b>234</b>   | <b>38</b>          | <b>524</b> |

**Court Calendar Report**

**Report Criteria:**

| Start Date | End Date   | Officer | Court Type |
|------------|------------|---------|------------|
| 06/20/2023 | 06/20/2023 | ALL     | ALL        |

| Court Date           | Name   | Ticket   | Officer/Court Type |
|----------------------|--|--|--------------------|
| 06/20/23<br>11:00 AM | BLEECKER,JENA,M<br>6011 ARIES WAY<br>MADISON WI, 53718 | DOB: 11/08/86<br>No: T-BH527209-4<br>Age: 36<br>Issued: 05/23/23<br>Inc #: 23-000195 |                    |

Comments: OFFICER: BADGE #: 17, NAME: JASON J MOCZYNSKI

| Charge        | Description                          | Fine    | Collected |
|---------------|--------------------------------------|---------|-----------|
| 347.48(2M)(B) | VEHICLE OPERATOR FAIL/WEAR SEAT BELT | \$10.00 | \$0.00    |

|                      |  |  |                |
|----------------------|--|--|----------------|
| 06/20/23<br>11:00 AM | KOVACS,COLLIN,T<br>212 S MAIN ST<br>LAKE MILLS WI, 53551 | DOB: 03/22/95<br>No: T-BH527207-2<br>Age: 28<br>Issued: 05/15/23<br>Inc #: 23-000184 | WARNER,DAVID,N |
|----------------------|--|--|----------------|

Comments: OFFICER: BADGE #: 11, NAME: DAVID N WARNER

| Charge       | Description                          | Fine     | Collected |
|--------------|--------------------------------------|----------|-----------|
| 343.05(3)(B) | OPERATE MOTORCYCLE W/O VALID LICENSE | \$200.50 | \$0.00    |

|                      |  |  |                         |
|----------------------|--|--|-------------------------|
| 06/20/23<br>11:00 AM | ANDERSON,SAMANTHA,M<br>217 N MONROE ST # 108<br>WATERLOO WI, 53594 | DOB: 01/27/92<br>No: T-BH527205-0<br>Age: 31<br>Issued: 05/14/23<br>Inc #: 23-000181 | JEFFERSON CO CIRCUIT CT |
|----------------------|--|--|-------------------------|

| Charge    | Description                            | Fine     | Collected |
|-----------|--|----------|-----------|
| 341.03(1) | OPERATE AFTER REV/SUSP OF REGISTRATION | \$175.30 | \$0.00    |

|                      |  |  |   |
|----------------------|--|--|---|
| 06/20/23<br>11:00 AM | BRANDT,TERRA,L<br>PO BOX 495<br>MARSHALL WI, 53559 | DOB: 01/13/90<br>No: C-1F80SPZ7WB<br>Age: 33<br>Issued: 04/17/23<br>Inc #: 23-000137 | BOLLIG,RANDY,P<br>JEFFERSON CO CIRCUIT CT |
|----------------------|--|--|---|

| Charge | Description                       | Fine     | Collected |
|--------|-----------------------------------|----------|-----------|
| 126-5D | FAILURE TO COMPLY WITH QUARANTINE | \$175.30 | \$0.00    |

|                      |   |  |   |
|----------------------|---|--|---|
| 06/20/23<br>11:00 AM | BRUNNER,MADILYN,OLIVIA<br>818 RICHARDS AVE<br>WATERTOWN WI, 53094 | DOB: 05/11/04<br>No: T-BH527378-5<br>Age: 18<br>Issued: 04/29/23<br>Inc #: 23-000158 | GIROUX,KEVIN<br>JEFFERSON CO CIRCUIT CT |
|----------------------|---|--|---|

| Charge       | Description               | Fine     | Collected |
|--------------|---------------------------|----------|-----------|
| 343.05(3)(A) | Operate w/o Valid License | \$200.50 | \$0.00    |

|                      |  |  |                         |
|----------------------|--|--|-------------------------|
| 06/20/23<br>11:00 AM | CARLSON,JOLEE,BETH<br>113 LOTHE RD<br>MARSHALL WI, 53559 | DOB: 09/01/87<br>No: T-BH527201-3<br>Age: 35<br>Issued: 05/11/23<br>Inc #: 23-000175 | JEFFERSON CO CIRCUIT CT |
|----------------------|--|--|-------------------------|

| Charge    | Description                             | Fine     | Collected |
|-----------|---|----------|-----------|
| 346.57(5) | EXCEEDING SPEED ZONES, ETC. (16-19 MPH) | \$200.50 | \$0.00    |

**Court Calendar Report**

**Report Criteria:**

| Start Date | End Date   | Officer | Court Type |
|------------|------------|---------|------------|
| 06/20/2023 | 06/20/2023 | ALL     | ALL        |

| Court Date           | Name   | DOB            | Ticket No  | Officer/Court Type                      |
|----------------------|--|----------------|--|---|
| 06/20/23<br>11:00 AM | CUAHUEY-MURILLO,JORGE<br>241 N MARQUETTE ST<br>MADISON WI, 53704 | 09/15/99<br>23 | T-BH527212-0<br>Issued: 05/27/23<br>Inc #: 23-000201 | GIROUX,KEVIN<br>JEFFERSON CO CIRCUIT CT |

| Charge    | Description            | Fine     | Collected |
|-----------|------------------------|----------|-----------|
| 346.46(1) | FAIL/STOP AT STOP SIGN | \$175.30 | \$0.00    |

| Court Date           | Name   | DOB            | Ticket No  | Officer/Court Type                      |
|----------------------|--|----------------|--|---|
| 06/20/23<br>11:00 AM | CUAHUEY-MURILLO,JORGE<br>241 N MARQUETTE ST<br>MADISON WI, 53704 | 09/15/99<br>23 | T-BH527213-1<br>Issued: 05/27/23<br>Inc #: 23-000201 | GIROUX,KEVIN<br>JEFFERSON CO CIRCUIT CT |

| Charge    | Description                         | Fine     | Collected |
|-----------|-------------------------------------|----------|-----------|
| 344.62(1) | OPERATE MOTOR VEHICLE W/O INSURANCE | \$200.50 | \$0.00    |

| Court Date           | Name   | DOB            | Ticket No  | Officer/Court Type      |
|----------------------|--|----------------|--|-------------------------|
| 06/20/23<br>11:00 AM | DAHLKE,TRENT,M<br>345 HARRISON<br>WATERLOO WI, 53594 | 10/12/73<br>49 | T-BH526699-5<br>Issued: 05/11/23<br>Inc #: 23-000174 | JEFFERSON CO CIRCUIT CT |

| Charge    | Description                         | Fine     | Collected |
|-----------|-------------------------------------|----------|-----------|
| 344.62(1) | OPERATE MOTOR VEHICLE W/O INSURANCE | \$200.50 | \$0.00    |

| Court Date           | Name   | DOB            | Ticket No  | Officer/Court Type                     |
|----------------------|--|----------------|--|--|
| 06/20/23<br>11:00 AM | DAVISON,ANNAN,C<br>623 KNOWLTON ST<br>WATERLOO WI, 53594 | 04/26/82<br>41 | C-1F80DJJ9CP<br>Issued: 04/30/23<br>Inc #: 23-000161 | BURNS,RANDY<br>JEFFERSON CO CIRCUIT CT |

| Charge    | Description              | Fine     | Collected |
|-----------|--------------------------|----------|-----------|
| 261-6A(2) | UNLAWFUL STORAGE OF JUNK | \$175.30 | \$0.00    |

| Court Date           | Name   | DOB            | Ticket No  | Officer/Court Type                     |
|----------------------|--|----------------|--|--|
| 06/20/23<br>11:00 AM | DEMBA,MOSES,J<br>915 HERRON DR<br>WATERLOO WI, 53594 | 01/04/68<br>55 | C-1F80DJJ9CN<br>Issued: 04/30/23<br>Inc #: 23-000160 | BURNS,RANDY<br>JEFFERSON CO CIRCUIT CT |

| Charge    | Description                 | Fine     | Collected |
|-----------|-----------------------------|----------|-----------|
| 261-6A(1) | UNLAWFUL STORAGE OF VEHICLE | \$175.30 | \$0.00    |

| Court Date           | Name   | DOB            | Ticket No  | Officer/Court Type                           |
|----------------------|--|----------------|--|--|
| 06/20/23<br>11:00 AM | ELRAWI,EHAB,K<br>2909 MANCHESTER RD<br>MADISON WI, 53719 | 02/14/93<br>30 | T-BH527203-5<br>Issued: 05/12/23<br>Inc #: 23-000179 | MOCZYNSKI,JASON,J<br>JEFFERSON CO CIRCUIT CT |

| Charge    | Description                             | Fine     | Collected |
|-----------|---|----------|-----------|
| 346.57(5) | EXCEEDING SPEED ZONES, ETC. (25-29 MPH) | \$250.90 | \$0.00    |

| Court Date           | Name   | DOB            | Ticket No  | Officer/Court Type                     |
|----------------------|--|----------------|--|--|
| 06/20/23<br>11:00 AM | FRANDLE,KEN<br>920 LUM AVE<br>WATERLOO WI, 53594 | 11/11/68<br>54 | C-1F80DJJ9CM<br>Issued: 04/30/23<br>Inc #: 23-000159 | BURNS,RANDY<br>JEFFERSON CO CIRCUIT CT |

| Charge    | Description              | Fine     | Collected |
|-----------|--------------------------|----------|-----------|
| 261-6A(2) | UNLAWFUL STORAGE OF JUNK | \$175.30 | \$0.00    |

**Court Calendar Report**

**Report Criteria:**

| Start Date | End Date   | Officer | Court Type |
|------------|------------|---------|------------|
| 06/20/2023 | 06/20/2023 | ALL     | ALL        |

| Court Date | Name  |               | Ticket                                    | Officer/Court Type           |
|------------|---|---------------|---|------------------------------|
| 06/20/23   | GALEANO CENTENO,JOISAFATH                     | DOB: 07/03/82 | No: T-BH527211-6                          | WARNER,DAVID,N               |
| 11:00 AM   | 554KNOWLTO STREET APT#1<br>WATERLOO WI, 53594 | Age: 40       | Issued: 05/27/23<br>Inc #: 23-000200      | JEFFERSON CO CIRCUIT CT      |
|            |   | <b>Charge</b> | <b>Description</b>                        | <b>Fine</b> <b>Collected</b> |
|            |   | 343.05(3)(A)  | OPERATE W/O VALID LICENSE (1ST VIOLATION) | \$200.50   \$0.00            |
| 06/20/23   | HERNANDEZ REYNA,SIGIFREDO                     | DOB: 10/03/89 | No: T-BF358816-3                          |                              |
| 11:00 AM   | 217 BISHOP CIR<br>WATERLOO WI, 535940000      | Age: 33       | Issued: 05/22/23<br>Inc #: 23-000194      | JEFFERSON CO CIRCUIT CT      |
|            |   | <b>Charge</b> | <b>Description</b>                        | <b>Fine</b> <b>Collected</b> |
|            |   | 346.18(2)     | FAIL/YIELD WHILE MAKING LEFT TURN         | \$175.30   \$0.00            |
| 06/20/23   | HERNANDEZ REYNA,SIGIFREDO                     | DOB: 10/03/89 | No: T-BF358817-4                          |                              |
| 11:00 AM   | 217 BISHOP CIR<br>WATERLOO WI, 535940000      | Age: 33       | Issued: 05/22/23<br>Inc #: 23-000194      | JEFFERSON CO CIRCUIT CT      |
|            |   | <b>Charge</b> | <b>Description</b>                        | <b>Fine</b> <b>Collected</b> |
|            |   | 344.62(1)     | OPERATE MOTOR VEHICLE W/O INSURANCE       | \$200.50   \$0.00            |
| 06/20/23   | KNUPPEL,KELLY,J                               | DOB: 02/15/60 | No: T-BH527206-1                          | MOCZYNSKI,JASON,J            |
| 11:00 AM   | N3804 COUNTY ROAD T<br>COLUMBUS WI, 53925     | Age: 63       | Issued: 05/15/23<br>Inc #: 23-000183      | JEFFERSON CO CIRCUIT CT      |
|            |   | <b>Charge</b> | <b>Description</b>                        | <b>Fine</b> <b>Collected</b> |
|            |   | 347.48(2M)(B) | VEHICLE OPERATOR FAIL/WEAR SEAT BELT      | \$10.00   \$0.00             |
| 06/20/23   | KORTH,SPENCER,CHRISTIAN                       | DOB: 02/24/01 | No: T-BH527379-6                          | GIROUX,KEVIN                 |
| 11:00 AM   | 620 E INDIAN HILLS DR<br>WATERLOO WI, 53594   | Age: 22       | Issued: 05/08/23<br>Inc #: 23-000165      | JEFFERSON CO CIRCUIT CT      |
|            |   | <b>Charge</b> | <b>Description</b>                        | <b>Fine</b> <b>Collected</b> |
|            |   | 346.46(1)     | FAIL/STOP AT STOP SIGN                    | \$175.30   \$0.00            |
| 06/20/23   | LIRA,PERFECTA                                 | DOB: 10/11/73 | No: T-BH527202-4                          |                              |
| 11:00 AM   | 1503 IVORY DR<br>SUN PRAIRIE WI, 53590        | Age: 49       | Issued: 05/12/23<br>Inc #: 23-000178      | JEFFERSON CO CIRCUIT CT      |
|            |   | <b>Charge</b> | <b>Description</b>                        | <b>Fine</b> <b>Collected</b> |
|            |   | 341.04(1)     | NON-REGISTRATION OF AUTO, ETC             | \$175.30   \$0.00            |
| 06/20/23   | LUCAS,NAKIA,DAWN                              | DOB: 05/01/01 | No: T-BH526698-4                          | GIROUX,KEVIN                 |
| 11:00 AM   | 606 S WANLNUT ST<br>EDINBURGH IN, 46124       | Age: 22       | Issued: 05/05/23<br>Inc #: 23-000164      | JEFFERSON CO CIRCUIT CT      |
|            |   | <b>Charge</b> | <b>Description</b>                        | <b>Fine</b> <b>Collected</b> |
|            |   | 346.57(5)     | Exceeding Speed Zones/Posted Limits       | \$175.30   \$0.00            |

Court Calendar Report

Report Criteria:

| Start Date | End Date   | Officer | Court Type |
|------------|------------|---------|------------|
| 06/20/2023 | 06/20/2023 | ALL     | ALL        |

| Court Date | Name                                     | DOB      | Ticket No                            | Officer/Court Type      |
|------------|--|----------|--------------------------------------|-------------------------|
| 06/20/23   | MARTIN,MALCOLM,DUANE                     | 01/20/68 | T-BH527369-3                         | BURNS,RANDY             |
| 11:00 AM   | 2716 N GRANT BLVD<br>MILWAUKEE WI, 53210 | Age: 55  | Issued: 04/17/23<br>Inc #: 23-000136 | JEFFERSON CO CIRCUIT CT |

| Charge    | Description            | Fine     | Collected |
|-----------|------------------------|----------|-----------|
| 346.46(1) | FAIL/STOP AT STOP SIGN | \$175.30 | \$0.00    |

| Court Date | Name                                   | DOB      | Ticket No                            | Officer/Court Type      |
|------------|--|----------|--------------------------------------|-------------------------|
| 06/20/23   | MATANOVIC,JAMES,C                      | 05/28/02 | T-BH527215-3                         | GIROUX,KEVIN            |
| 11:00 AM   | 355 S SCOTT ST<br>WHITEWATER WI, 53190 | Age: 21  | Issued: 05/28/23<br>Inc #: 23-000203 | JEFFERSON CO CIRCUIT CT |

| Charge    | Description                                | Fine     | Collected |
|-----------|--|----------|-----------|
| 346.57(5) | EXCEEDING SPEED ZONES, ETC.<br>(16-19 MPH) | \$200.50 | \$0.00    |

| Court Date | Name                               | DOB      | Ticket No                            | Officer/Court Type      |
|------------|------------------------------------|----------|--------------------------------------|-------------------------|
| 06/20/23   | OCTAVIANO,VICTOR,JULIAN            | 08/28/82 | T-BH526809-3                         | GIROUX,KEVIN            |
| 11:00 AM   | 128 NANCY LN<br>WATERLOO WI, 53594 | Age: 40  | Issued: 05/22/23<br>Inc #: 23-000193 | JEFFERSON CO CIRCUIT CT |

| Charge       | Description                               | Fine     | Collected |
|--------------|---|----------|-----------|
| 343.05(3)(A) | OPERATE W/O VALID LICENSE (1ST VIOLATION) | \$200.50 | \$0.00    |

| Court Date | Name                               | DOB      | Ticket No                            | Officer/Court Type      |
|------------|------------------------------------|----------|--------------------------------------|-------------------------|
| 06/20/23   | OCTAVIANO,VICTOR,JULIAN            | 08/28/82 | T-BH526810-4                         | GIROUX,KEVIN            |
| 11:00 AM   | 128 NANCY LN<br>WATERLOO WI, 53594 | Age: 40  | Issued: 05/22/23<br>Inc #: 23-000193 | JEFFERSON CO CIRCUIT CT |

| Charge    | Description                         | Fine     | Collected |
|-----------|-------------------------------------|----------|-----------|
| 344.62(1) | OPERATE MOTOR VEHICLE W/O INSURANCE | \$200.50 | \$0.00    |

| Court Date | Name                               | DOB      | Ticket No                            | Officer/Court Type      |
|------------|------------------------------------|----------|--------------------------------------|-------------------------|
| 06/20/23   | OCTAVIANO,VICTOR,JULIAN            | 08/28/82 | T-BH526811-5                         | GIROUX,KEVIN            |
| 11:00 AM   | 128 NANCY LN<br>WATERLOO WI, 53594 | Age: 40  | Issued: 05/22/23<br>Inc #: 23-000193 | JEFFERSON CO CIRCUIT CT |

| Charge    | Description                   | Fine     | Collected |
|-----------|-------------------------------|----------|-----------|
| 341.04(1) | NON-REGISTRATION OF AUTO, ETC | \$175.30 | \$0.00    |

| Court Date | Name                                   | DOB      | Ticket No                            | Officer/Court Type      |
|------------|--|----------|--------------------------------------|-------------------------|
| 06/20/23   | ORDONEZ,JAZMINE,RENAE                  | 03/28/01 | T-BH527210-5                         | MOCZYNSKI,JASON,J       |
| 11:00 AM   | 552 W MAIN ST<br>SUN PRAIRIE WI, 53590 | Age: 22  | Issued: 05/24/23<br>Inc #: 23-000197 | JEFFERSON CO CIRCUIT CT |

| Charge       | Description                               | Fine     | Collected |
|--------------|---|----------|-----------|
| 343.05(3)(A) | OPERATE W/O VALID LICENSE (1ST VIOLATION) | \$200.50 | \$0.00    |

**Court Calendar Report**

**Report Criteria:**

| Start Date | End Date   | Officer | Court Type |
|------------|------------|---------|------------|
| 06/20/2023 | 06/20/2023 | ALL     | ALL        |

| Court Date           | Name   | DOB:                | Ticket No:   | Officer/Court Type                      |
|----------------------|--|---------------------|--|---|
| 06/20/23<br>11:00 AM | PAUL,COLLIN,DEAN<br>N8137 LIBERTY RD<br>RANDOLPH WI, 53956 | 09/17/02<br>Age: 20 | C-1F80QT5JN7<br>Issued: 05/21/23<br>Inc #: 23-000192 | GIROUX,KEVIN<br>JEFFERSON CO CIRCUIT CT |

| Charge       | Description                     | Fine     | Collected |
|--------------|---------------------------------|----------|-----------|
| 125.07(4)(B) | UNDERAGE DRINKING-POSSESS-17-20 | \$263.50 | \$0.00    |

| Court Date           | Name   | DOB:                | Ticket No:   | Officer/Court Type                      |
|----------------------|--|---------------------|--|---|
| 06/20/23<br>11:00 AM | PAUL,COLLIN,DEAN<br>N8137 LIBERTY RD<br>RANDOLPH WI, 53137 | 09/17/02<br>Age: 20 | T-BF358814-1<br>Issued: 05/21/23<br>Inc #: 23-000192 | GIROUX,KEVIN<br>JEFFERSON CO CIRCUIT CT |

| Charge       | Description           | Fine     | Collected |
|--------------|-----------------------|----------|-----------|
| 346.63(1)(B) | OPERATING W/PAC (1ST) | \$937.50 | \$0.00    |

| Court Date           | Name   | DOB:                | Ticket No:   | Officer/Court Type                      |
|----------------------|--|---------------------|--|---|
| 06/20/23<br>11:00 AM | PAUL,COLLIN,DEAN<br>N8137 LIBERTY RD<br>RANDOLPH WI, 53137 | 09/17/02<br>Age: 20 | T-BF359212-0<br>Issued: 05/21/23<br>Inc #: 23-000192 | GIROUX,KEVIN<br>JEFFERSON CO CIRCUIT CT |

| Charge    | Description                             | Fine     | Collected |
|-----------|---|----------|-----------|
| 346.57(5) | EXCEEDING SPEED ZONES, ETC. (16-19 MPH) | \$200.50 | \$0.00    |

| Court Date           | Name  | DOB:                | Ticket No:   | Officer/Court Type                        |
|----------------------|---|---------------------|--|---|
| 06/20/23<br>11:00 AM | RAMOS,REGINO,URIAS<br>N675 COUNTY ROAD BB<br>WATERLOO WI, 53594 | 06/29/77<br>Age: 45 | T-BH527214-2<br>Issued: 05/28/23<br>Inc #: 23-000202 | WARNER,DAVID,N<br>JEFFERSON CO CIRCUIT CT |

| Charge    | Description                             | Fine     | Collected |
|-----------|---|----------|-----------|
| 346.57(5) | EXCEEDING SPEED ZONES, ETC. (11-15 MPH) | \$175.30 | \$0.00    |

| Court Date           | Name  | DOB:                | Ticket No:   | Officer/Court Type                        |
|----------------------|---|---------------------|--|---|
| 06/20/23<br>11:00 AM | VAN POOL,DAVID,ALLEN<br>734 N MONROE ST #<br>WATERLOO WI, 53594 | 07/11/80<br>Age: 42 | C-1F80SPZ7WF<br>Issued: 05/19/23<br>Inc #: 23-000190 | WARNER,DAVID,N<br>JEFFERSON CO CIRCUIT CT |

| Charge              | Description               | Fine     | Collected |
|---------------------|---------------------------|----------|-----------|
| 278-1-943.13(1M)(A) | CRIMINAL TRESPASS TO LAND | \$389.30 | \$0.00    |

| Court Date           | Name   | DOB:                | Ticket No:   | Officer/Court Type                        |
|----------------------|--|---------------------|--|---|
| 06/20/23<br>11:00 AM | VILLARREAL,SUJEIRY<br>739 N CHURCH ST<br>WATERTOWN WI, 53098 | 09/03/03<br>Age: 19 | T-BH527376-3<br>Issued: 04/26/23<br>Inc #: 23-000152 | WARNER,DAVID,N<br>JEFFERSON CO CIRCUIT CT |

| Charge    | Description                             | Fine     | Collected |
|-----------|---|----------|-----------|
| 346.57(5) | EXCEEDING SPEED ZONES, ETC. (11-15 MPH) | \$175.30 | \$0.00    |



**Court Calendar Report**

**Report Criteria:**

| Start Date | End Date   | Officer | Court Type |
|------------|------------|---------|------------|
| 06/20/2023 | 06/20/2023 | ALL     | ALL        |

| Court Date | Name                                   | DOB      | Ticket No                            | Officer/Court Type      |
|------------|--|----------|--------------------------------------|-------------------------|
| 06/20/23   | VILLARREAL,SUJEIRY                     | 09/03/03 | T-BH527377-4                         | WARNER,DAVID,N          |
| 11:00 AM   | 739 N CHURCH ST<br>WATERTOWN WI, 53098 | Age: 19  | Issued: 04/26/23<br>Inc #: 23-000152 | JEFFERSON CO CIRCUIT CT |

| Charge    | Description                   | Fine     | Collected |
|-----------|-------------------------------|----------|-----------|
| 341.04(1) | NON-REGISTRATION OF AUTO, ETC | \$175.30 | \$0.00    |

**Ticket Count: 33**

**Total Fines: \$6896.70**  
**Total Payments: \$0.00**  
**Total Due: \$6896.70**

# MONTHLY ACTIVITY LOG

6/1-6/30/23

| DATE      | TITLE               | NOTES  |
|-----------|---------------------|--|
| 6-5-2023  | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-3-2023  | Trespassing         | Officer took a report of trespassing on property.          |
| 6-5-2023  | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-6-2023  | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-6-2023  | Assist              | Officer requested to assist Jefferson County.              |
| 6-8-2023  | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-8-2023  | Vandalism           | Officer took report of damage to property.                 |
| 6-8-2023  | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-9-2023  | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-9-2023  | Disorderly Conduct  | Officer handled a case of disorderly conduct.              |
| 6-13-2023 | Assist              | Officer assisted Human Services                            |
| 6-13-2023 | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-13-2023 | Traffic Stop        | Officer conducted a traffic stop—citation issued.          |
| 6-14-2023 | Suspicious person   | Officer took a report of a suspicious person/prowler.      |
| 6-14-2023 | Probation Hold      | Arrest made on a probation hold.                           |
| 6-14-2023 | Assist              | Officer assisted Social Services                           |
| 6-15-2023 | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-14-2023 | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-16-2023 | Welfare Check       | Officer conducted a welfare check per request.             |
| 6-16-2023 | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-17-2023 | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-17-2023 | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-20-2023 | Traffic stop        | Officer conducted a traffic stop—citation issued.          |
| 6-20-2023 | Welfare check       | Officer conducted a welfare check.                         |
| 6-21-2023 | Assist              | Officer requested to assist mutual aid.                    |
| 6-21-2023 | Assist              | Officer assisted social services                           |
| 6/21/2023 | Death investigation | Officer handled a death investigation                      |
| 6/22/2023 | Theft               | Officers handled a theft case.                             |
| 6/23/2023 | Disorderly Conduct  | Officer handled a disorderly conduct case. Citation issued |
| 6/26/2023 | Civil dispute       | Officers assisted with a civil dispute                     |
| 6/30/2023 | Assist              | Officer assisted Jefferson County                          |



**Regular meeting of the Waterloo Water & Light Commission held July 11, 2023**

The meeting was called to order by President Tom Bergan at 7:00pm at the Waterloo Utilities office. Present were Commissioners Vern Butzine, Devin Schumann, Tim Thomas, Chuck Wallace, and Superintendent Barry Sorenson.

**Minutes**

It was moved by Schumann, seconded by Butzine, to approve the minutes of the June 13, 2023 meeting. Motion carried.

**Expenditures**

It was moved by Thomas, seconded by Schumann, to approve the payment of the June bills as presented. Motion carried.

**Citizen Input**

None.

**Bids for Security**

Tabled to next meeting.

**Discussion on Employee Handbook**

It was moved by Butzine, seconded by Wallace, to update the Waterloo Water & Light employee handbook. Draft to be present in September. Motion carried.

**Ordinance Change**

It was moved by Schumann, seconded by Butzine, to recommend change to ordinance 340-2 D (2) per Attorney Cole's recommendation to City Council. Motion carried.

**WWTP Pay Request**

It was moved by Bergan, seconded by Wallace, to recommend approval of Portzen's Pay Request #2 in the amount of \$542,292.47 to City Council. Motion carried.

Discussion on 2024 budget schedule.

It was moved by Butzine, seconded by Schumann, to adjourn. Motion carried.

Respectfully submitted,  
Tim Thomas  
Secretary

**List of Bills**

|                                 |            |                                   |              |
|---------------------------------|------------|-----------------------------------|--------------|
| 4 Control                       | 562.00     | Millennium                        | 1,064.05     |
| AC Engineering                  | 2,322.20   | MJ Electric                       | 103,423.40   |
| Alternative Technologies        | 616.00     | North Central Lab                 | 874.40       |
| APG of Southern Wisconsin       | 57.35      | Northern Lake Service             | 4,280.99     |
| Axley Brynerson                 | 4,118.40   | PC Connection                     | 305.66       |
| Badger Pest Control             | 800.00     | Paragon Development Systems       | 1,520.00     |
| Tom Bergan                      | 140.00     | Peak Garage Doors                 | 3,010.95     |
| BP Credit Card Center           | 903.50     | Payment Service Network           | 12.95        |
| Border States                   | 15,318.99  | Pig                               | 24.32        |
| Vern Butzine                    | 105.00     | Payroll                           | 74,598.55    |
| City of Waterloo Treasurer      | 105,341.54 | PSC                               | 293.25       |
| C&M Hydraulic Tool Supply       | 2,950.01   | Portland Sanitary District        | 12,595.49    |
| Charter Communications          | 344.96     | Resco                             | 2,499.04     |
| Wendy Copenhefer                | 102.75     | Devin Schumann                    | 140.00       |
| Crescent Electric Supply        | 113.53     | SEERA                             | 1,300.47     |
| DNR                             | 175.00     | SJE                               | 2,670.12     |
| Dunneisen Excavating            | 267.84     | James Scott                       | 190.00       |
| Ehler's Pershing Advisor        | 110.40     | Solenis LLC                       | 4,788.01     |
| Elster Solutions                | 985.60     | Slewfoot Signs                    | 300.00       |
| Environmental Express           | 1,693.01   | Town & Country Engineering        | 59,015.50    |
| F&M Bank                        | 125.53     | Tim Thomas                        | 105.00       |
| Forester Electrical Engineering | 7,649.82   | United Liquid Waste Recycling     | 2,775.00     |
| Frontier                        | 413.36     | US Cellular                       | 206.25       |
| GFC Leasing                     | 104.00     | Unifirst Corp                     | 416.04       |
| Hawkins                         | 9,707.20   | UPS                               | 153.01       |
| Hellenbrand Ace                 | 511.35     | Visa                              | 2,014.67     |
| Howie's Hardware                | 1,136.41   | Chuck Wallace                     | 140.00       |
| Infosend                        | 959.29     | Wastewater Training Solutions     | 740.00       |
| Irby                            | 3,106.29   | Waterloo Building Center          | 62.50        |
| K Press & Trends                | 1,200.00   | Waterloo Utilities                | 13,744.26    |
| K&B Auto                        | 404.00     | WE Energies                       | 583.82       |
| Lou's Gloves                    | 109.00     | Watertown Regional Medical Center | 225.00       |
| Marshfield Clinic Health System | 120.00     | Wisconsin Dept. of Revenue        | 11,392.09    |
| Metalworx                       | 325.00     | WPPI Energy                       | 228,595.62   |
| MEUW                            | 475.00     |                                   |              |
|                                 |            | Total Disbursements               | \$697,434.74 |

**Checking Account #102-613:**

|                 |                    |
|-----------------|--------------------|
| Balance 5/31/23 | \$40,722.59        |
| Deposits        | 671,203.10         |
| Disbursements   | (697,198.81)       |
| Interest        | 4.78               |
| Service Charge  |                    |
| Balance 6/30/23 | <u>\$14,731.66</u> |

**WWTP Account #374-547 (DNR Replacement Fund)**

|                       |                     |
|-----------------------|---------------------|
| Balance 5/31/23       | \$552,984.14        |
| Deposit/ (Withdrawal) |                     |
| Interest              | 136.35              |
| Balance 6/30/23       | <u>\$553,120.49</u> |

**Debt Service Account #3015323:**

|                 |                     |
|-----------------|---------------------|
| Balance 5/31/23 | \$235,550.75        |
| Deposit         | 49,210.00           |
| Bond Payment    |                     |
| Interest        | 990.22              |
| Balance 6/30/23 | <u>\$285,750.97</u> |

**Money Market Account #110-832:**

|                 |                     |
|-----------------|---------------------|
| Balance 5/31/23 | 853,879.11          |
| Deposits        | (5,380.39)          |
| Transfer        | (49,210.00)         |
| Disbursements   |                     |
| Interest        | 211.09              |
| Service Charge  | (125.53)            |
| Balance 6/30/23 | <u>\$799,374.28</u> |

**Transportation Fund**

|                 |                    |
|-----------------|--------------------|
| Balance 5/31/23 | \$12,586.00        |
| Transfer        |                    |
| Balance 6/30/23 | <u>\$12,586.00</u> |

**WWTP Interim Financing:**

|                 |                     |
|-----------------|---------------------|
| Balance 5/31/23 | \$930,400.05        |
| Transferred in  |                     |
| Transferred out |                     |
| Interest        | 3,391.75            |
| Service Charge  | (110.40)            |
| Balance 6/30/23 | <u>\$933,681.40</u> |

**Avestar CD #3596 (Bond Reserve):**

|                 |                     |
|-----------------|---------------------|
| Balance 5/31/23 | 312,401.90          |
| Interest        |                     |
| Balance 6/30/23 | <u>\$312,401.90</u> |

**CD #613386 (Bond Reserve):**

|                 |                     |
|-----------------|---------------------|
| Balance 5/31/23 | 221,676.48          |
| Interest        |                     |
| Balance 6/30/23 | <u>\$221,676.48</u> |

## **Waterloo Cable Monthly Report**

WLOO CATV had an active month in June. We were able to cover a Civic Health Community event at the Solarium. This event outlined ways in which conversations can be held amongst peers about sensitive topics and remain civil. This is an ongoing task, and we hope to share our work with the community soon. WLOO CATV was able to share the stage with Fran Gartner, creator of Precious Glass which can be found on Facebook/Meta. Fran is also a long-time Waterloo resident who retired from her work with the Waterloo Police Department. Fran will be featured on our Waterloo Resident Artist Series. We also have a new installment by the name of Chris's Classic Cinema. A film review by Chris Weihert and his co-host Jacob Niemuth. You can find all of these programs on YouTube channel at WLOO CATV. Waterloo Cable Station is Peg Station of the Month and is featured on WisconsinCommunityMedia.com where it talks about projects and services that WLOO has been doing in the Waterloo Community.



|               |   |
|---------------|---|
| Project Name: | Waterloo - 2023 Water and Wastewater Improvements |
| Project No.:  | WW-47   |
| Month of:     | June  |
| Completed By: | Lisa Twarog                                       |

## Monthly Report

| General Construction Activities by Structure   |  |   |               |
|--|--|---|---------------|
| Structure  | Activity   |   |               |
| Site   | <ul style="list-style-type: none"> <li>- Most MHs installed, additional site piping installed (Line 75, Line 5F', Line 5F)</li> <li>- Erosion control around Str. 30 and 25</li> </ul>   |   |               |
| Vac Dump   | Completed. Additional row of blocks with staggered seam added to top.  |   |               |
| 10   | <ul style="list-style-type: none"> <li>- Excavations, footings, and frost walls completed</li> <li>- Completed underground sanitary piping</li> <li>- Began masonry installation</li> </ul>  |   |               |
| 20   | n/a  |   |               |
| 25   | n/a  |   |               |
| 30   | <ul style="list-style-type: none"> <li>- Removed diffusers from Aeration Basins 3, 4, and 5</li> <li>- Began installing walkway between Aeration Basins 4 and 5</li> <li>- Installed temporary air line for Aeration Basin influent channel</li> <li>- Installed temporary RAS lines for Aeration Basin</li> </ul> |   |               |
| 35   | n/a  |   |               |
| 40   | n/a  |   |               |
| 45   | n/a  |   |               |
| 50   | n/a  |   |               |
| 55   | n/a  |   |               |
| 60   | n/a  |   |               |
| 65   | n/a  |   |               |
| 70   | n/a  |   |               |
| 75   | n/a  |   |               |
| 85   | n/a  |   |               |
| Booster Station  | n/a  |   |               |
| Contractors/Firms On-Site  |  | Work Change Directives                              |               |
| Portzen - General Contractor   |  | Buried Structure (paid from supplemental bid items) | \$ 6,543.00   |
| Dubuque Plumbing & Heating - Mechanical Contractor   |  | Lab Casework  | \$ (6,000.00) |
| Pieper Power - Electrical Contractor   |  |   |               |
| Bern Masonry - Mason   |  |   |               |
| RFI's/Clarifications/Issues  |  |   |               |
| - Construction Correspondence has been sent out describing how to reroute remaining underground piping that could potentially intersect abandoned building foundations from the 1950s. |  |   |               |
| Significant Meetings   |  |   |               |
| Date   | Topic  | Participants  | Action Items  |
| 6/27/2023  | Str. 30 Phasing Coordination Meeting   | Portzen, T&C  |               |
| 6/28/2023  | Monthly Const. Meeting   | Waterloo Utilities, T&C, Portzen, Pieper Power, DNR |               |

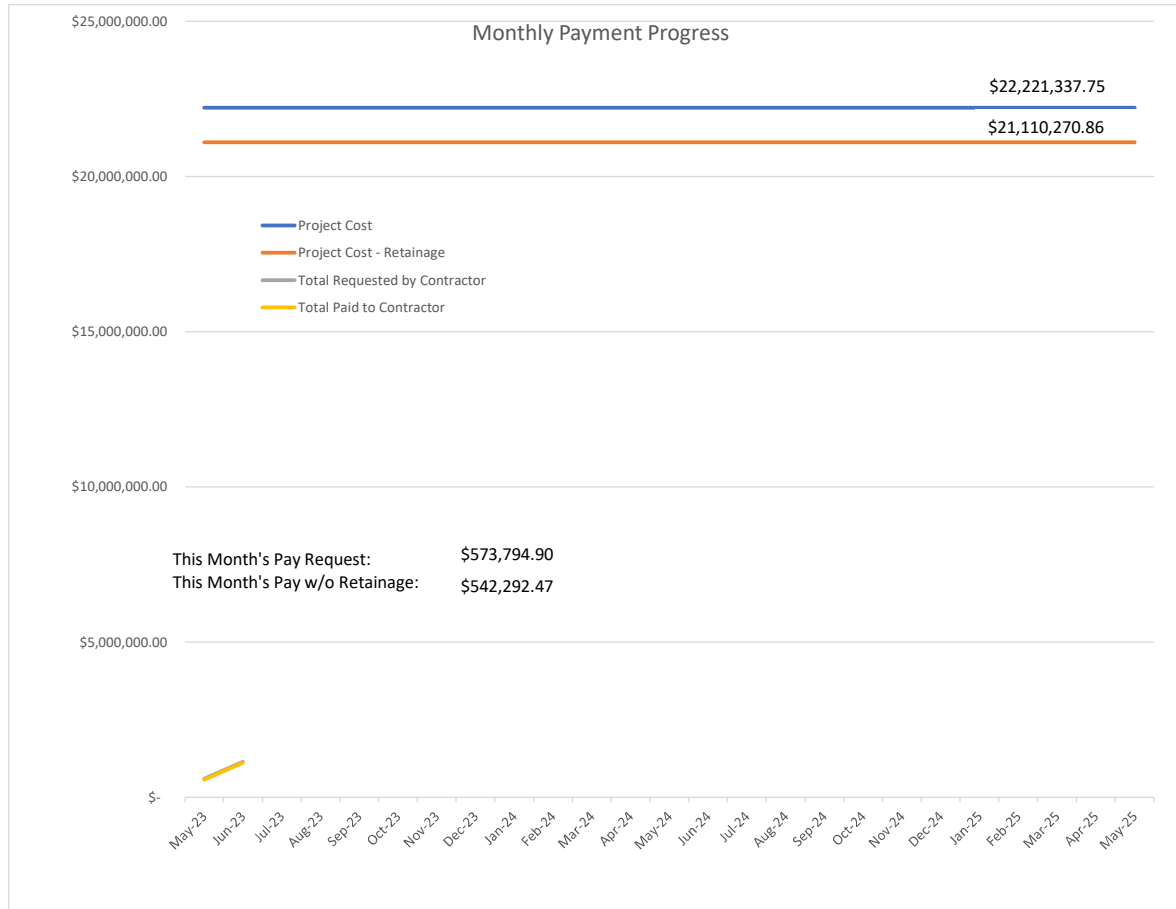


| Anticipated Work Next Month |  |
|-----------------------------|--|
| Structure                   | Activity   |
| Site                        | - Continued piping installation, erosion control, and grading                        |
| Vac Dump                    | Complete.  |
| 10                          | - Complete masonry, pouring the floor, HVAC  |
| 20                          |  |
| 25                          | - Once plug valves are received (tentatively early August), focus will be on Str. 25 |
| 30                          | - Continuing work on walkway and creating selector basins in Basin 5                 |
| 35                          |  |
| 40                          |  |
| 45                          |  |
| 50                          |  |
| 55                          | - Begin construction   |
| 60                          |  |
| 65                          |  |
| 70                          |  |
| 75                          |  |
| 85                          |  |



Project Name: Waterloo - 2023 Water and Wastewater Improvements  
 Project No.: WW-47  
 Month of: June  
 Completed By: Lisa Twarog

**Monthly Payment Progress**



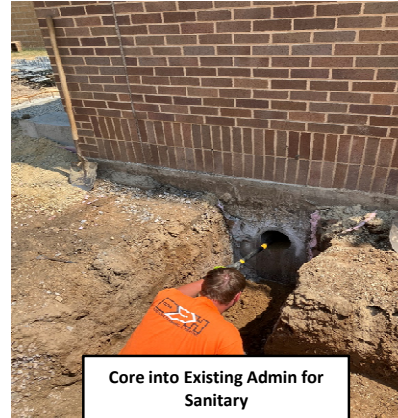
**Monthly Progress Pictures**



Str. 10 Concrete Footings



Structure 10 Sanitary Running to Line 2A



Core into Existing Admin for Sanitary



Looking East at Line 5F and Wye for Line 76 Tie In



Completed Vac Dump Station



10 - East Wall Waiting for Lintels Above Glass Block Windows



Walkway Framing Above Aeration Basins 4 & 5



Aeration Basin 3 - Diffusers Removed



**Contractor's Application for Payment**

|  |   |
|--|---|
| <b>Owner:</b> <u>Waterloo Utilities</u>  | <b>Owner's Project No.:</b> _____             |
| <b>Engineer:</b> <u>Town &amp; Country Engineering</u>                             | <b>Engineer's Project No.:</b> <u>WW-62</u>   |
| <b>Contractor:</b> <u>Portzen</u>  | <b>Contractor's Project No.:</b> <u>23-04</u> |
| <b>Project:</b> <u>2023 Water and Wastewater Improvements</u>                      |   |
| <b>Contract:</b> <u>Wastewater Treatment Facility and Water Booster Station</u>    |   |
| <b>Application No.:</b> <u>2</u>   | <b>Application Date:</b> <u>6/29/2023</u>     |
| <b>Application Period:</b> <u>From</u> <u>5/26/2023</u> <u>to</u> <u>6/29/2023</u> |   |

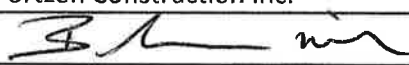
|  |                  |
|--|------------------|
| 1. Original Contract Price   | \$ 22,221,337.75 |
| 2. Net change by Change Orders   | \$ -             |
| 3. Current Contract Price (Line 1 + Line 2)  | \$ 22,221,337.75 |
| 4. Total Work completed and materials stored to date<br>(Sum of Column G Lump Sum Total and Column J Unit Price Total) | \$ 1,174,828.81  |
| 5. Retainage   |                  |
| a. <u>5%</u> X <u>\$ 893,565.75</u> Work Completed   | \$ 44,678.29     |
| b. <u>5%</u> X <u>\$ 281,263.06</u> Stored Materials   | \$ 14,063.15     |
| c. Total Retainage (Line 5.a + Line 5.b)   | \$ 58,741.44     |
| 6. Amount eligible to date (Line 4 - Line 5.c)   | \$ 1,116,087.37  |
| 7. Less previous payments (Line 6 from prior application)  | \$ 573,794.90    |
| 8. Amount due this application   | \$ 542,292.47    |
| 9. Balance to finish, including retainage (Line 3 - Line 4)  | \$ 21,046,508.94 |


**Contractor's Certification**

The undersigned Contractor certifies, to the best of its knowledge, the following:

- (1) All previous progress payments received from Owner on account of Work done under the Contract have been applied on account to discharge Contractor's legitimate obligations incurred in connection with the Work covered by prior Applications for Payment;
- (2) Title to all Work, materials and equipment incorporated in said Work, or otherwise listed in or covered by this Application for Payment, will pass to Owner at time of payment free and clear of all liens, security interests, and encumbrances (except such as are covered by a bond acceptable to Owner indemnifying Owner against any such liens, security interest, or encumbrances); and
- (3) All the Work covered by this Application for Payment is in accordance with the Contract Documents and is not defective.

**Contractor:** Portzen Construction Inc.

**Signature:**  **Date:** 7/6/2023

|  |   |
|--|---|
| <p><b>Recommended by Engineer</b></p> <p><b>By:</b> <u></u></p> <p><b>Title:</b> <u>VICE-PRESIDENT</u></p> <p><b>Date:</b> <u>7/10/2023</u></p> <p><b>Approved by Funding Agency</b></p> <p><b>By:</b> _____</p> <p><b>Title:</b> _____</p> <p><b>Date:</b> _____</p> | <p><b>Approved by Owner</b></p> <p><b>By:</b> _____</p> <p><b>Title:</b> _____</p> <p><b>Date:</b> _____</p> <p><b>By:</b> _____</p> <p><b>Title:</b> _____</p> <p><b>Date:</b> _____</p> |
|--|---|

Progress Estimate - Lump Sum Work

Contractor's Application for Payment

|             |   |                           |       |
|-------------|---|---------------------------|-------|
| Owner:      | Waterloo Utilities                                      | Owner's Project No.:      |       |
| Engineer:   | Town & Country Engineering                              | Engineer's Project No.:   | WW-62 |
| Contractor: | Portzen   | Contractor's Project No.: | 23-04 |
| Project:    | 2023 Water and Wastewater Improvements                  |                           |       |
| Contract:   | Wastewater Treatment Facility and Water Booster Station |                           |       |

| Application No.:         |                                  | 2                    |  | Application Period: |   | From   | 05/26/23                         | to                             | 06/29/23 | Application Date: |  | 06/29/23 |
|--------------------------|----------------------------------|----------------------|--|---------------------|---|--|----------------------------------|--------------------------------|----------|-------------------|--|----------|
| A                        | B                                | C                    | D                                      | E                   | F   | G  | H                                | I                              |          |                   |  |          |
| Item No.                 | Description                      | Scheduled Value (\$) | Work Completed                         |                     | Materials Currently Stored (not in D or E) (\$) | Work Completed and Materials Stored to Date (D + E + F) (\$) | % of Scheduled Value (G / C) (%) | Balance to Finish (C - G) (\$) |          |                   |  |          |
|                          |                                  |                      | (D + E) From Previous Application (\$) | This Period (\$)    |   |  |                                  |                                |          |                   |  |          |
| <b>Original Contract</b> |                                  |                      |  |                     |   |  |                                  |                                |          |                   |  |          |
| 1                        | <b>GENERAL REQUIREMENTS</b>      |                      |  |                     |   |  |                                  |                                |          |                   |  |          |
| 2                        | Bonds                            | \$ 111,350.00        | 111,350.00                             |                     |   | 111,350.00   | 100%                             | -                              |          |                   |  |          |
| 3                        | Mobilization                     | \$ 180,698.00        | 60,000.00                              | 10,000.00           |   | 70,000.00  | 39%                              | 110,698.00                     |          |                   |  |          |
| 4                        | Project Management               | \$ 466,830.00        | 37,000.00                              | 16,700.00           |   | 53,700.00  | 12%                              | 413,130.00                     |          |                   |  |          |
| 5                        | Project Management Software      | \$ 27,562.00         | 27,562.00                              |                     |   | 27,562.00  | 100%                             | -                              |          |                   |  |          |
| 6                        | Temporary Construction Fence     | \$ 20,000.00         | 20,000.00                              |                     |   | 20,000.00  | 100%                             | -                              |          |                   |  |          |
| 7                        | Port-a-potty rental              | \$ 12,812.00         | 600.00                                 | 600.00              |   | 1,200.00   | 9%                               | 11,612.00                      |          |                   |  |          |
| 8                        | Job trailer                      | \$ 17,325.00         | 550.00                                 | 550.00              |   | 1,100.00   | 6%                               | 16,225.00                      |          |                   |  |          |
| 9                        | Trash Disposal                   | \$ 31,500.00         | 800.00                                 | 800.00              |   | 1,600.00   | 5%                               | 29,900.00                      |          |                   |  |          |
| 10                       | Safety                           | \$ 15,750.00         | 400.00                                 | 400.00              |   | 800.00   | 5%                               | 14,950.00                      |          |                   |  |          |
| 11                       | Survey & Staking                 | \$ 10,500.00         | 1,000.00                               | 500.00              |   | 1,500.00   | 14%                              | 9,000.00                       |          |                   |  |          |
| 12                       | Concrete Testing                 | \$ 26,250.00         |  | 2,000.00            |   | 2,000.00   | 8%                               | 24,250.00                      |          |                   |  |          |
| 13                       | Project Sign                     | \$ 1,575.00          | 1,575.00                               |                     |   | 1,575.00   | 100%                             | -                              |          |                   |  |          |
| 14                       | Lodging                          | \$ 196,350.00        | 7,550.00                               | 7,550.00            |   | 15,100.00  | 8%                               | 181,250.00                     |          |                   |  |          |
| 15                       | Temp. Utilities                  | \$ 105,000.00        |  | 2,500.00            |   | 2,500.00   | 2%                               | 102,500.00                     |          |                   |  |          |
| 16                       | Cleaning Site and Building       | \$ 45,990.00         |  |                     |   | -  | 0%                               | 45,990.00                      |          |                   |  |          |
| 17                       | Equipment Rental                 | \$ 175,600.00        |  | 5,000.00            |   | 5,000.00   | 3%                               | 170,600.00                     |          |                   |  |          |
| 18                       | <b>SITework</b>                  |                      |  |                     |   |  |                                  |                                |          |                   |  |          |
| 19                       | Selective Demolition             | \$ 241,105.00        |  | 2,500.00            |   | 2,500.00   | 1%                               | 238,605.00                     |          |                   |  |          |
| 20                       | Site Demo                        | \$ 114,251.00        | 14,640.00                              |                     |   | 14,640.00  | 13%                              | 99,611.00                      |          |                   |  |          |
| 21                       | Erosion Control                  | \$ 5,250.00          | 3,520.00                               |                     |   | 3,520.00   | 67%                              | 1,730.00                       |          |                   |  |          |
| 22                       | Rammed Aggregate Piers           | \$ 109,605.00        | 69,051.00                              |                     |   | 69,051.00  | 63%                              | 40,554.00                      |          |                   |  |          |
| 23                       | Paving Prep                      | \$ 182,735.00        |  |                     |   | -  | 0%                               | 182,735.00                     |          |                   |  |          |
| 24                       | Aphalt Paving                    | \$ 171,308.00        |  |                     |   | -  | 0%                               | 171,308.00                     |          |                   |  |          |
| 25                       | Concrete Paving                  | \$ 155,770.00        |  | 3,800.00            |   | 3,800.00   | 2%                               | 151,970.00                     |          |                   |  |          |
| 26                       | Site Furnishings                 | \$ 3,150.00          |  |                     |   | -  | 0%                               | 3,150.00                       |          |                   |  |          |
| 27                       | Temp Roads                       | \$ 7,875.00          | 3,500.00                               | 4,375.00            |   | 7,875.00   | 100%                             | -                              |          |                   |  |          |
| 28                       | Rough Grading                    | \$ 159,886.00        |  |                     |   | -  | 0%                               | 159,886.00                     |          |                   |  |          |
| 29                       | Building Excavation and Backfill | \$ 190,756.00        | 10,000.00                              | 10,308.00           |   | 20,308.00  | 11%                              | 170,448.00                     |          |                   |  |          |
| 30                       | Sanitary Systems                 | \$ 1,515,690.00      | 59,454.23                              | 101,912.52          | 216,860.62                                      | 378,227.37   | 25%                              | 1,137,462.63                   |          |                   |  |          |
| 31                       | Storm Systems                    | \$ 121,166.00        |  |                     |   | -  | 0%                               | 121,166.00                     |          |                   |  |          |
| 32                       | Water Systems                    | \$ 214,044.00        |  |                     |   | -  | 0%                               | 214,044.00                     |          |                   |  |          |
| 33                       | Site Air Piping                  | \$ 245,980.00        |  |                     |   | -  | 0%                               | 245,980.00                     |          |                   |  |          |
| 34                       | Landscaping WWTF                 | \$ 46,550.00         |  |                     |   | -  | 0%                               | 46,550.00                      |          |                   |  |          |
| 35                       | <b>CONCRETE</b>                  |                      |  |                     |   |  |                                  |                                |          |                   |  |          |
| 36                       | Concrete                         | \$ 938,579.00        |  | 77,228.00           | 28,601.35                                       | 105,829.35   | 11%                              | 832,749.65                     |          |                   |  |          |
| 37                       | Precast Concrete                 | \$ 41,583.00         |  |                     |   | -  | 0%                               | 41,583.00                      |          |                   |  |          |
| 38                       | <b>MASONRY</b>                   |                      |  |                     |   |  |                                  |                                |          |                   |  |          |
| 39                       | Masonry Materials ST 10          | \$ 155,608.00        |  | 43,308.00           |   | 43,308.00  | 28%                              | 112,300.00                     |          |                   |  |          |
| 40                       | Masonry Labor ST10               | \$ 301,146.00        |  | 41,776.00           |   | 41,776.00  | 14%                              | 259,370.00                     |          |                   |  |          |
| 41                       | Masonry Materials ST 25          | \$ 93,952.00         |  |                     |   | -  | 0%                               | 93,952.00                      |          |                   |  |          |
| 42                       | Masonry Labor ST25               | \$ 156,675.00        |  |                     |   | -  | 0%                               | 156,675.00                     |          |                   |  |          |
| 43                       | Masonry Materials ST 50          | \$ 8,515.00          |  |                     |   | -  | 0%                               | 8,515.00                       |          |                   |  |          |
| 44                       | Masonry Labor ST50               | \$ 19,753.00         |  |                     |   | -  | 0%                               | 19,753.00                      |          |                   |  |          |
| 45                       | Masonry Materials ST 55          | \$ 44,533.00         |  |                     |   | -  | 0%                               | 44,533.00                      |          |                   |  |          |
| 46                       | Masonry Labor ST55               | \$ 75,320.00         |  |                     |   | -  | 0%                               | 75,320.00                      |          |                   |  |          |
| 47                       | <b>METALS</b>                    |                      |  |                     |   |  |                                  |                                |          |                   |  |          |
| 48                       | Structural Steel Framing         | \$ 24,267.00         |  |                     |   | -  | 0%                               | 24,267.00                      |          |                   |  |          |
| 49                       | Metal Fabrications               | \$ 110,144.00        |  |                     |   | -  | 0%                               | 110,144.00                     |          |                   |  |          |



Progress Estimate - Lump Sum Work

Contractor's Application for Payment

|             |   |                           |       |
|-------------|---|---------------------------|-------|
| Owner:      | Waterloo Utilities                                      | Owner's Project No.:      |       |
| Engineer:   | Town & Country Engineering                              | Engineer's Project No.:   | WW-62 |
| Contractor: | Portzen   | Contractor's Project No.: | 23-04 |
| Project:    | 2023 Water and Wastewater Improvements                  |                           |       |
| Contract:   | Wastewater Treatment Facility and Water Booster Station |                           |       |

| Application No.: |                                       | Application Period:  |  | Application Date: |   |  |                                  |                                |   |
|------------------|---------------------------------------|----------------------|--|-------------------|---|--|----------------------------------|--------------------------------|---|
| 2                |                                       | From                 | 05/26/23                               | to                | 06/29/23  | Application Date:  | 06/29/23                         |                                |   |
| A                | B                                     | C                    | D                                      |                   | E   | F  | G                                | H                              | I |
|                  |                                       |                      | Work Completed                         |                   |   |  |                                  |                                |   |
| Item No.         | Description                           | Scheduled Value (\$) | (D + E) From Previous Application (\$) | This Period (\$)  | Materials Currently Stored (not in D or E) (\$) | Work Completed and Materials Stored to Date (D + E + F) (\$) | % of Scheduled Value (G / C) (%) | Balance to Finish (C - G) (\$) |   |
| 50               | Guard & Hand Rail                     | \$ 170,313.00        |  |                   |   | -  | 0%                               | 170,313.00                     |   |
| 51               | Bar Grating                           | \$ 384,672.00        |  |                   |   | -  | 0%                               | 384,672.00                     |   |
| 52               | Labor to install                      | \$ 229,145.00        |  |                   |   | -  | 0%                               | 229,145.00                     |   |
| 53               | Access Hatches                        | \$ 12,600.00         |  |                   |   | -  | 0%                               | 12,600.00                      |   |
| 54               | <b>CARPENTRY</b>                      |                      |  |                   |   |  |                                  |                                |   |
| 55               | Trusses                               | \$ 39,108.00         |  |                   |   | -  | 0%                               | 39,108.00                      |   |
| 56               | Truss Labor                           | \$ 22,460.00         |  |                   |   | -  | 0%                               | 22,460.00                      |   |
| 57               | Rough Carpentry                       | \$ 130,546.00        |  |                   |   | -  | 0%                               | 130,546.00                     |   |
| 58               | Finish Carentry                       | \$ 5,386.00          |  |                   |   | -  | 0%                               | 5,386.00                       |   |
| 59               | <b>THERMAL &amp; MOISTURE</b>         |                      |  |                   |   |  |                                  |                                |   |
| 60               | Dampproofing & Joint Sealants         | \$ 78,250.00         |  |                   |   | -  | 0%                               | 78,250.00                      |   |
| 61               | Thermal Insulation                    | \$ 21,854.00         |  | 2,016.00          |   | 2,016.00   | 9%                               | 19,838.00                      |   |
| 62               | Weather barrier                       | \$ 5,250.00          |  |                   |   | -  | 0%                               | 5,250.00                       |   |
| 63               | ST 10 Roofing Materials               | \$ 117,398.00        |  |                   |   | -  | 0%                               | 117,398.00                     |   |
| 64               | ST 10 Roofing Labor                   | \$ 63,361.00         |  |                   |   | -  | 0%                               | 63,361.00                      |   |
| 65               | ST 25 Roofing Materials               | \$ 23,610.00         |  |                   |   | -  | 0%                               | 23,610.00                      |   |
| 66               | ST 25 Roofing Labor                   | \$ 14,857.00         |  |                   |   | -  | 0%                               | 14,857.00                      |   |
| 67               | ST 35 Roofing Materials               | \$ 7,954.00          |  |                   |   | -  | 0%                               | 7,954.00                       |   |
| 68               | ST 35 Roofing Labor                   | \$ 3,512.00          |  |                   |   | -  | 0%                               | 3,512.00                       |   |
| 69               | ST 50 Roofing Materials               | \$ 41,764.00         |  |                   |   | -  | 0%                               | 41,764.00                      |   |
| 70               | ST 50 Roofing Labor                   | \$ 17,556.00         |  |                   |   | -  | 0%                               | 17,556.00                      |   |
| 71               | ST 55 Roofing Materials               | \$ 21,510.00         |  |                   |   | -  | 0%                               | 21,510.00                      |   |
| 72               | ST 55 Roofing Labor                   | \$ 12,755.00         |  |                   |   | -  | 0%                               | 12,755.00                      |   |
| 73               | <b>DOORS &amp; WINDOWS</b>            |                      |  |                   |   |  |                                  |                                |   |
| 74               | Structure 10 Doors, Frames & Hardware | \$ 46,925.00         |  |                   |   | -  | 0%                               | 46,925.00                      |   |
| 75               | Structure 25 Doors, Frames & Hardware | \$ 11,887.00         |  |                   |   | -  | 0%                               | 11,887.00                      |   |
| 76               | Structure 35 Doors, Frames & Hardware | \$ 9,161.00          |  |                   |   | -  | 0%                               | 9,161.00                       |   |
| 77               | Structure 50 Doors, Frames & Hardware | \$ 25,080.00         |  |                   |   | -  | 0%                               | 25,080.00                      |   |
| 78               | Structure 55 Doors, Frames & Hardware | \$ 5,863.00          |  |                   |   | -  | 0%                               | 5,863.00                       |   |
| 79               | Labor to install                      | \$ 35,140.00         |  |                   |   | -  | 0%                               | 35,140.00                      |   |
| 80               | Sectional Overhead Doors              | \$ 62,450.00         |  |                   |   | -  | 0%                               | 62,450.00                      |   |
| 81               | Aluminum Windows and Galzing          | \$ 21,169.00         |  |                   |   | -  | 0%                               | 21,169.00                      |   |
| 82               | Aluminum Access Doors                 | \$ 14,490.00         |  |                   |   | -  | 0%                               | 14,490.00                      |   |
| 83               | Attic Access                          | \$ 5,250.00          |  |                   |   | -  | 0%                               | 5,250.00                       |   |
| 84               | <b>FINISHES</b>                       |                      |  |                   |   |  |                                  |                                |   |
| 85               | Gyp Wall Board Assemblies             | \$ 36,414.00         |  |                   |   | -  | 0%                               | 36,414.00                      |   |
| 86               | Acoustical Ceilings                   | \$ 15,015.00         |  |                   |   | -  | 0%                               | 15,015.00                      |   |
| 87               | Quarry Tile                           | \$ 72,420.00         |  |                   |   | -  | 0%                               | 72,420.00                      |   |
| 88               | Vinyl Wall Base                       | \$ 693.00            |  |                   |   | -  | 0%                               | 693.00                         |   |
| 89               | Painting                              | \$ 469,740.00        |  |                   |   | -  | 0%                               | 469,740.00                     |   |
| 90               | <b>SPECIALTIES</b>                    | \$ 13,681.00         |  |                   |   | -  | 0%                               | 13,681.00                      |   |
| 91               | <b>FURNISHINGS</b>                    |                      |  |                   |   |  |                                  |                                |   |
| 92               | Plastic Laminate Casework             | \$ 5,250.00          |  |                   |   | -  | 0%                               | 5,250.00                       |   |
| 93               | Labor to install casework             | \$ 2,194.00          |  |                   |   | -  | 0%                               | 2,194.00                       |   |
| 94               | Laboratory Casework                   | \$ 67,568.00         |  |                   |   | -  | 0%                               | 67,568.00                      |   |
| 95               | Labor to install casework             | \$ 9,118.00          |  |                   |   | -  | 0%                               | 9,118.00                       |   |
| 96               | Engineering for Casework              | \$ 2,100.00          |  |                   |   | -  | 0%                               | 2,100.00                       |   |
| 97               | <b>MECHANICAL</b>                     |                      |  |                   |   |  |                                  |                                |   |
| 98               | Plumbing & Process Project Management | \$ 126,000.00        | 13,500.00                              | 2,800.00          |   | 16,300.00  | 13%                              | 109,700.00                     |   |
| 99               | <b>STRUCTURE 10:</b>                  |                      |  |                   |   |  |                                  |                                |   |



Progress Estimate - Lump Sum Work

Contractor's Application for Payment

Owner: Waterloo Utilities  
 Engineer: Town & Country Engineering  
 Contractor: Portzen  
 Project: 2023 Water and Wastewater Improvements  
 Contract: Wastewater Treatment Facility and Water Booster Station

Owner's Project No.:  
 Engineer's Project No.: WW-62  
 Contractor's Project No.: 23-04

| Application No.: |   | Application Period:  |  | From             | to  | Application Date:  |                                  |                                |
|------------------|---|----------------------|--|------------------|---|--|----------------------------------|--------------------------------|
| 2                |   |                      |  | 05/26/23         | 06/29/23  | 06/29/23   |                                  |                                |
| A                | B   | C                    | D                                      | E                | F   | G  | H                                | I                              |
| Item No.         | Description                                 | Scheduled Value (\$) | Work Completed                         |                  | Materials Currently Stored (not in D or E) (\$) | Work Completed and Materials Stored to Date (D + E + F) (\$) | % of Scheduled Value (G / C) (%) | Balance to Finish (C - G) (\$) |
|                  |   |                      | (D + E) From Previous Application (\$) | This Period (\$) |   |  |                                  |                                |
| 100              | Plumbing/Hydraulics Materials and Equipment | \$ 136,500.00        |  | 16,850.00        | 23,855.20                                       | 40,705.20  | 30%                              | 95,794.80                      |
| 101              | Plumbing/Hydraulics Labor                   | \$ 262,500.00        |  | 2,800.00         |   | 2,800.00   | 1%                               | 259,700.00                     |
| 102              | Plumbing Insulation Materials               | \$ 6,898.00          |  |                  |   | -  | 0%                               | 6,898.00                       |
| 103              | Plumbing Insulation Labor                   | \$ 5,515.00          |  |                  |   | -  | 0%                               | 5,515.00                       |
| 104              | Excavation                                  | \$ 11,550.00         |  |                  |   | -  | 0%                               | 11,550.00                      |
| 105              | HVAC Equipment                              | \$ 312,841.00        |  |                  |   | -  | 0%                               | 312,841.00                     |
| 106              | HVAC Sheetmetal                             | \$ 61,950.00         |  |                  |   | -  | 0%                               | 61,950.00                      |
| 107              | HVAC Vent, Stands                           | \$ 6,720.00          |  |                  |   | -  | 0%                               | 6,720.00                       |
| 108              | HVAC Misc. Materials                        | \$ 5,775.00          |  |                  |   | -  | 0%                               | 5,775.00                       |
| 109              | HVAC Equipment Rental                       | \$ 9,450.00          |  |                  |   | -  | 0%                               | 9,450.00                       |
| 110              | HVAC Labor                                  | \$ 130,218.00        |  |                  |   | -  | 0%                               | 130,218.00                     |
| 111              | HVAC Management                             | \$ 5,250.00          |  |                  |   | -  | 0%                               | 5,250.00                       |
| 112              | HVAC Test and Balance                       | \$ 10,080.00         |  |                  |   | -  | 0%                               | 10,080.00                      |
| 113              | HVAC Controls                               | \$ 168,000.00        |  |                  |   | -  | 0%                               | 168,000.00                     |
| 114              | HVAC Submittals, Pre-Con and Mobilization   | \$ 71,720.00         |  | 8,000.00         |   | 8,000.00   | 11%                              | 63,720.00                      |
| 115              | HVAC Insulation Materials                   | \$ 16,810.00         |  |                  |   | -  | 0%                               | 16,810.00                      |
| 116              | HVAC Insulation Labor                       | \$ 13,844.00         |  |                  |   | -  | 0%                               | 13,844.00                      |
| 117              | <b>STRUCTURE 20</b>                         |                      |  |                  |   | -  |                                  | -                              |
| 188              | Process Materials                           | \$ 42,000.00         |  |                  |   | -  | 0%                               | 42,000.00                      |
| 119              | Process Labor                               | \$ 37,800.00         |  |                  |   | -  | 0%                               | 37,800.00                      |
| 120              | <b>STRUCTURE 25:</b>                        |                      |  |                  |   | -  |                                  | -                              |
| 121              | Plumbing/Process Materials                  | \$ 36,750.00         |  |                  |   | -  | 0%                               | 36,750.00                      |
| 122              | Plumbing/Process Labor                      | \$ 49,350.00         |  |                  |   | -  | 0%                               | 49,350.00                      |
| 123              | Plumbing Insulation Material                | \$ 3,555.00          |  |                  |   | -  | 0%                               | 3,555.00                       |
| 124              | Plumbing Insulation Labor                   | \$ 2,703.00          |  |                  |   | -  | 0%                               | 2,703.00                       |
| 125              | HVAC Sheet Metal                            | \$ 15,750.00         |  |                  |   | -  | 0%                               | 15,750.00                      |
| 126              | HVAC Vent, Stands                           | \$ 4,200.00          |  |                  |   | -  | 0%                               | 4,200.00                       |
| 127              | HVAC Misc. Materials                        | \$ 3,150.00          |  |                  |   | -  | 0%                               | 3,150.00                       |
| 128              | HVAC Equipment Rental                       | \$ 4,200.00          |  |                  |   | -  | 0%                               | 4,200.00                       |
| 129              | HVAC Labor                                  | \$ 36,267.00         |  |                  |   | -  | 0%                               | 36,267.00                      |
| 130              | HVAC Management                             | \$ 2,625.00          |  |                  |   | -  | 0%                               | 2,625.00                       |
| 131              | HVAC Insulation Materials                   | \$ 2,241.00          |  |                  |   | -  | 0%                               | 2,241.00                       |
| 132              | HVAC Insulation Labor                       | \$ 1,839.00          |  |                  |   | -  | 0%                               | 1,839.00                       |
| 133              | <b>STRUCTURE 30</b>                         |                      |  |                  |   | -  |                                  | -                              |
| 134              | Process Materials                           | \$ 89,250.00         |  |                  |   | -  | 0%                               | 89,250.00                      |
| 135              | Process Labor                               | \$ 140,700.00        |  |                  |   | -  | 0%                               | 140,700.00                     |
| 136              | <b>STRUCTURE 35:</b>                        |                      |  |                  |   | -  |                                  | -                              |
| 137              | Plumbing/ Process Materials                 | \$ 5,250.00          |  |                  |   | -  | 0%                               | 5,250.00                       |
| 138              | Plumbing/Process Labor                      | \$ 1,050.00          |  |                  |   | -  | 0%                               | 1,050.00                       |
| 139              | HVAC Sheet Metal                            | \$ 5,250.00          |  |                  |   | -  | 0%                               | 5,250.00                       |
| 140              | HVAC Misc. Materials                        | \$ 2,100.00          |  |                  |   | -  | 0%                               | 2,100.00                       |
| 141              | HVAC Equipment Rental                       | \$ 2,100.00          |  |                  |   | -  | 0%                               | 2,100.00                       |
| 142              | HVAC Labor                                  | \$ 25,856.00         |  |                  |   | -  | 0%                               | 25,856.00                      |
| 143              | HVAC Management                             | \$ 2,625.00          |  |                  |   | -  | 0%                               | 2,625.00                       |
| 144              | HVAC Submittals, Pre-Con and Mobilization   | \$ 6,300.00          |  | 1,000.00         |   | 1,000.00   | 16%                              | 5,300.00                       |
| 145              | HVAC Insulation Materials                   | \$ 1,120.00          |  |                  |   | -  | 0%                               | 1,120.00                       |
| 146              | HVAC Insulation Labor                       | \$ 975.00            |  |                  |   | -  | 0%                               | 975.00                         |
| 147              | <b>STRUCTURE 40</b>                         |                      |  |                  |   | -  |                                  | -                              |
| 148              | Process Materials                           | \$ 14,700.00         |  |                  |   | -  | 0%                               | 14,700.00                      |
| 149              | Process Labor                               | \$ 30,450.00         |  |                  |   | -  | 0%                               | 30,450.00                      |



Progress Estimate - Lump Sum Work

Contractor's Application for Payment

|             |   |                           |       |
|-------------|---|---------------------------|-------|
| Owner:      | Waterloo Utilities                                      | Owner's Project No.:      |       |
| Engineer:   | Town & Country Engineering                              | Engineer's Project No.:   | WW-62 |
| Contractor: | Portzen   | Contractor's Project No.: | 23-04 |
| Project:    | 2023 Water and Wastewater Improvements                  |                           |       |
| Contract:   | Wastewater Treatment Facility and Water Booster Station |                           |       |

| Application No.: |   | Application Period:  |  | Application Date: |   |  |                                  |                                |   |
|------------------|---|----------------------|--|-------------------|---|--|----------------------------------|--------------------------------|---|
| 2                |   | From                 | 05/26/23                               | to                | 06/29/23  | Application Date:  | 06/29/23                         |                                |   |
| A                | B   | C                    | D                                      |                   | E   | F  | G                                | H                              | I |
|                  |   |                      | Work Completed                         |                   |   |  |                                  |                                |   |
| Item No.         | Description                               | Scheduled Value (\$) | (D + E) From Previous Application (\$) | This Period (\$)  | Materials Currently Stored (not in D or E) (\$) | Work Completed and Materials Stored to Date (D + E + F) (\$) | % of Scheduled Value (G / C) (%) | Balance to Finish (C - G) (\$) |   |
| 150              | <b>STRUCTURE 50:</b>                      |                      |  |                   |   |  |                                  |                                |   |
| 151              | Plumbing/Process Materials                | \$ 299,250.00        |  |                   | 11,945.89                                       | 11,945.89  | 4%                               | 287,304.11                     |   |
| 152              | Plumbing/Process Labor                    | \$ 893,231.00        |  |                   |   |  | 0%                               | 893,231.00                     |   |
| 153              | Plumbing Insulation Material              | \$ 2,440.00          |  |                   |   |  | 0%                               | 2,440.00                       |   |
| 154              | Plumbing Insulation Labor                 | \$ 1,730.00          |  |                   |   |  | 0%                               | 1,730.00                       |   |
| 155              | HVAC Sheet Metal                          | \$ 9,450.00          |  |                   |   |  | 0%                               | 9,450.00                       |   |
| 156              | HVAC Misc. Materials                      | \$ 9,923.00          |  |                   |   |  | 0%                               | 9,923.00                       |   |
| 157              | HVAC Equipment Rental                     | \$ 3,150.00          |  |                   |   |  | 0%                               | 3,150.00                       |   |
| 158              | HVAC Labor                                | \$ 64,776.00         |  |                   |   |  | 0%                               | 64,776.00                      |   |
| 159              | HVAC Management                           | \$ 2,625.00          |  |                   |   |  | 0%                               | 2,625.00                       |   |
| 160              | HVAC Submittals, Pre-Con and Mobilization | \$ 12,600.00         |  | 1,500.00          |   | 1,500.00   | 12%                              | 11,100.00                      |   |
| 161              | HVAC Insulation Materials                 | \$ 1,120.00          |  |                   |   |  | 0%                               | 1,120.00                       |   |
| 162              | HVAC Insulation Labor                     | \$ 975.00            |  |                   |   |  | 0%                               | 975.00                         |   |
| 163              | <b>STRUCTURE 55</b>                       |                      |  |                   |   |  |                                  |                                |   |
| 164              | Plumbing/Process Materials                | \$ 168,000.00        |  |                   |   |  | 0%                               | 168,000.00                     |   |
| 165              | Plumbing/Process Labor                    | \$ 115,500.00        |  |                   |   |  | 0%                               | 115,500.00                     |   |
| 166              | Plumbing Insulation Materials             | \$ 1,837.00          |  |                   |   |  | 0%                               | 1,837.00                       |   |
| 167              | Plumbing Insulation Labor                 | \$ 1,405.00          |  |                   |   |  | 0%                               | 1,405.00                       |   |
| 168              | HVAC Sheet Metal                          | \$ 12,600.00         |  |                   |   |  | 0%                               | 12,600.00                      |   |
| 169              | HVAC Vent, Stands                         | \$ 6,300.00          |  |                   |   |  | 0%                               | 6,300.00                       |   |
| 170              | HVAC Misc. Materials                      | \$ 2,362.00          |  |                   |   |  | 0%                               | 2,362.00                       |   |
| 171              | HVAC Equipment Rental                     | \$ 2,100.00          |  |                   |   |  | 0%                               | 2,100.00                       |   |
| 172              | HVAC Labor                                | \$ 25,331.00         |  |                   |   |  | 0%                               | 25,331.00                      |   |
| 173              | HVAC Management                           | \$ 2,625.00          |  |                   |   |  | 0%                               | 2,625.00                       |   |
| 174              | HVAC Submittals, Pre-Con and Mobilization | \$ 15,750.00         |  | 1,500.00          |   | 1,500.00   | 10%                              | 14,250.00                      |   |
| 175              | HVAC Insulation Materials                 | \$ 1,120.00          |  |                   |   |  | 0%                               | 1,120.00                       |   |
| 176              | HVAC Insulation Labor                     | \$ 975.00            |  |                   |   |  | 0%                               | 975.00                         |   |
| 177              | <b>STRUCTURE 60</b>                       |                      |  |                   |   |  |                                  |                                |   |
| 178              | Process Materials                         | \$ 55,650.00         |  |                   |   |  | 0%                               | 55,650.00                      |   |
| 179              | Process Labor                             | \$ 44,100.00         |  |                   |   |  | 0%                               | 44,100.00                      |   |
| 180              | <b>STRUCTURE 70</b>                       |                      |  |                   |   |  |                                  |                                |   |
| 181              | Process Materials                         | \$ 44,100.00         |  |                   |   |  | 0%                               | 44,100.00                      |   |
| 182              | Process Labor                             | \$ 162,750.00        |  |                   |   |  | 0%                               | 162,750.00                     |   |
| 183              | <b>STRUCTURE 75</b>                       |                      |  |                   |   |  |                                  |                                |   |
| 184              | Plumbing/Process Materials                | \$ 31,415.00         |  |                   |   |  | 0%                               | 31,415.00                      |   |
| 185              | Plumbing/Process Labor                    | \$ 68,250.00         |  |                   |   |  | 0%                               | 68,250.00                      |   |
| 186              | <b>Indian Hills Booster Station</b>       |                      |  |                   |   |  |                                  |                                |   |
| 187              | Process Materials                         | \$ 1,260.00          |  |                   |   |  | 0%                               | 1,260.00                       |   |
| 188              | Process Labor                             | \$ 1,260.00          |  |                   |   |  | 0%                               | 1,260.00                       |   |
| 189              | <b>ELECTRICAL</b>                         |                      |  |                   |   |  |                                  |                                |   |
| 190              | Mobilization                              | \$ 138,776.00        |  | 47,184.00         |   | 47,184.00  | 34%                              | 91,592.00                      |   |
| 191              | Supervision                               | \$ 140,127.00        |  |                   |   |  | 0%                               | 140,127.00                     |   |
| 192              | Start-up & Commissioning                  | \$ 15,785.00         |  |                   |   |  | 0%                               | 15,785.00                      |   |
| 193              | Closeout Documents                        | \$ 12,050.00         |  |                   |   |  | 0%                               | 12,050.00                      |   |
| 194              | Demobilization                            | \$ 8,914.00          |  |                   |   |  | 0%                               | 8,914.00                       |   |
| 195              | <b>General &amp; Site</b>                 |                      |  |                   |   |  |                                  |                                |   |
| 196              | Temp Electric                             | \$ 34,643.00         |  | 32,994.00         |   | 32,994.00  | 95%                              | 1,649.00                       |   |
| 197              | Electrical Labor                          | \$ 90,573.00         |  |                   |   |  | 0%                               | 90,573.00                      |   |
| 198              | Electrical Material                       | \$ 227,857.00        |  |                   |   |  | 0%                               | 227,857.00                     |   |
| 199              | Electrical Lighting and Labor             | \$ 9,548.00          |  |                   |   |  | 0%                               | 9,548.00                       |   |



Progress Estimate - Lump Sum Work

Contractor's Application for Payment

Owner: Waterloo Utilities  
 Engineer: Town & Country Engineering  
 Contractor: Portzen  
 Project: 2023 Water and Wastewater Improvements  
 Contract: Wastewater Treatment Facility and Water Booster Station

Owner's Project No.: \_\_\_\_\_  
 Engineer's Project No.: WW-62  
 Contractor's Project No.: 23-04

Application No.: 2 Application Period: From 05/26/23 to 06/29/23 Application Date: 06/29/23

| A<br>Item No. | B<br>Description                         | C<br>Scheduled Value (\$) | D<br>Work Completed                    |                   | F<br>Materials Currently Stored (not in D or E) (\$) | G<br>Work Completed and Materials Stored to Date (D + E + F) (\$) | H<br>% of Scheduled Value (G / C) (%) | I<br>Balance to Finish (C - G) (\$) |
|---------------|--|---------------------------|--|-------------------|--|---|---------------------------------------|-------------------------------------|
|               |  |                           | (D + E) From Previous Application (\$) | This Period (\$)  |  |   |                                       |                                     |
|               |  |                           | 200                                    | Generator Install |  |   |                                       |                                     |
| 201           | Demo                                     | \$ 17,690.00              |  |                   |  | -   | 0%                                    | 17,690.00                           |
| 202           | Electrical Excavation & ductbank         | \$ 95,592.00              |  |                   |  | -   | 0%                                    | 95,592.00                           |
| 203           | STR 10                                   |                           |  |                   |  | -   |                                       | -                                   |
| 204           | Temp Electric                            | \$ 17,326.00              |  |                   |  | -   | 0%                                    | 17,326.00                           |
| 205           | Electrical Raceway Material              | \$ 107,165.00             |  | 3,062.00          |  | 3,062.00  | 3%                                    | 104,103.00                          |
| 206           | Electrical Raceway Labor                 | \$ 104,843.00             |  |                   |  | -   | 0%                                    | 104,843.00                          |
| 207           | Electrical Wire Material                 | \$ 18,490.00              |  |                   |  | -   | 0%                                    | 18,490.00                           |
| 208           | Electrical Wire Labor                    | \$ 25,925.00              |  |                   |  | -   | 0%                                    | 25,925.00                           |
| 209           | Electrical Labor - MCC, Gear & Equipment | \$ 9,806.00               |  |                   |  | -   | 0%                                    | 9,806.00                            |
| 210           | Electrical Lighting and Labor            | \$ 62,270.00              |  |                   |  | -   | 0%                                    | 62,270.00                           |
| 211           | STR 20                                   |                           |  |                   |  | -   |                                       | -                                   |
| 212           | Electrical Material                      | \$ 6,190.00               |  |                   |  | -   | 0%                                    | 6,190.00                            |
| 213           | Electrical Labor                         | \$ 6,160.00               |  |                   |  | -   | 0%                                    | 6,160.00                            |
| 214           | STR 25                                   |                           |  |                   |  | -   |                                       | -                                   |
| 215           | Electrical Material                      | \$ 56,170.00              |  |                   |  | -   | 0%                                    | 56,170.00                           |
| 216           | Electrical Labor                         | \$ 56,725.00              |  |                   |  | -   | 0%                                    | 56,725.00                           |
| 217           | Electrical Lighting and Labor            | \$ 24,694.00              |  |                   |  | -   | 0%                                    | 24,694.00                           |
| 218           | STR 30                                   |                           |  |                   |  | -   |                                       | -                                   |
| 219           | Electrical Material                      | \$ 40,647.00              |  |                   |  | -   | 0%                                    | 40,647.00                           |
| 220           | Electrical Labor                         | \$ 41,110.00              |  |                   |  | -   | 0%                                    | 41,110.00                           |
| 221           | STR 35                                   |                           |  |                   |  | -   |                                       | -                                   |
| 222           | Electrical Material                      | \$ 14,827.00              |  |                   |  | -   | 0%                                    | 14,827.00                           |
| 223           | Electrical Labor                         | \$ 23,100.00              |  |                   |  | -   | 0%                                    | 23,100.00                           |
| 224           | Electrical Lighting and Labor            | \$ 9,190.00               |  |                   |  | -   | 0%                                    | 9,190.00                            |
| 225           | STR 40                                   |                           |  |                   |  | -   |                                       | -                                   |
| 226           | Electrical Material                      | \$ 16,622.00              |  |                   |  | -   | 0%                                    | 16,622.00                           |
| 227           | Electrical Labor                         | \$ 14,581.00              |  |                   |  | -   | 0%                                    | 14,581.00                           |
| 228           | Electrical Lighting and Labor            | \$ 12,091.00              |  |                   |  | -   | 0%                                    | 12,091.00                           |
| 229           | STR 50                                   |                           |  |                   |  | -   |                                       | -                                   |
| 230           | Electrical Material                      | \$ 133,977.00             |  |                   |  | -   | 0%                                    | 133,977.00                          |
| 231           | Electrical Labor                         | \$ 112,934.00             |  |                   |  | -   | 0%                                    | 112,934.00                          |
| 232           | Electrical Lighting and Labor            | \$ 52,589.00              |  |                   |  | -   | 0%                                    | 52,589.00                           |
| 233           | Electrical Labor - MCC, Gear & Equipment | \$ 13,705.00              |  |                   |  | -   | 0%                                    | 13,705.00                           |
| 234           | STR 55                                   |                           |  |                   |  | -   |                                       | -                                   |
| 235           | Electrical Material                      | \$ 37,762.00              |  |                   |  | -   | 0%                                    | 37,762.00                           |
| 236           | Electrical Labor                         | \$ 53,015.00              |  |                   |  | -   | 0%                                    | 53,015.00                           |
| 237           | Electrical Lighting and Labor            | \$ 8,388.00               |  |                   |  | -   | 0%                                    | 8,388.00                            |
| 238           | STR 60                                   |                           |  |                   |  | -   |                                       | -                                   |
| 239           | Electrical Material                      | \$ 7,497.00               |  |                   |  | -   | 0%                                    | 7,497.00                            |
| 240           | Electrical Labor                         | \$ 12,235.00              |  |                   |  | -   | 0%                                    | 12,235.00                           |
| 241           | Electrical Lighting and Labor            | \$ 2,910.00               |  |                   |  | -   | 0%                                    | 2,910.00                            |
| 242           | STR 70                                   |                           |  |                   |  | -   |                                       | -                                   |
| 243           | Electrical Material                      | \$ 27,350.00              |  |                   |  | -   | 0%                                    | 27,350.00                           |
| 244           | Electrical Labor                         | \$ 19,915.00              |  |                   |  | -   | 0%                                    | 19,915.00                           |
| 245           | Electrical Lighting and Labor            | \$ 30,410.00              |  |                   |  | -   | 0%                                    | 30,410.00                           |
| 246           | STR 75                                   |                           |  |                   |  | -   |                                       | -                                   |
| 247           | Electrical Material                      | \$ 6,165.00               |  |                   |  | -   | 0%                                    | 6,165.00                            |
| 248           | Electrical Labor                         | \$ 5,893.00               |  |                   |  | -   | 0%                                    | 5,893.00                            |
| 249           | Electrical Lighting and Labor            | \$ 6,666.00               |  |                   |  | -   | 0%                                    | 6,666.00                            |



Progress Estimate - Lump Sum Work

Contractor's Application for Payment

|             |   |                           |       |
|-------------|---|---------------------------|-------|
| Owner:      | Waterloo Utilities                                      | Owner's Project No.:      |       |
| Engineer:   | Town & Country Engineering                              | Engineer's Project No.:   | WW-62 |
| Contractor: | Portzen   | Contractor's Project No.: | 23-04 |
| Project:    | 2023 Water and Wastewater Improvements                  |                           |       |
| Contract:   | Wastewater Treatment Facility and Water Booster Station |                           |       |

| Application No.: |  | Application Period:  |  | From             | to  | Application Date:  |                                  |                                |              |
|------------------|--|----------------------|--|------------------|---|--|----------------------------------|--------------------------------|--------------|
| 2                |  | From                 | 05/26/23                               | to               | 06/29/23  | 06/29/23   |                                  |                                |              |
| A                | B  | C                    | D                                      |                  | E   | F  | G                                | H                              | I            |
| Item No.         | Description  | Scheduled Value (\$) | Work Completed                         |                  | Materials Currently Stored (not in D or E) (\$) | Work Completed and Materials Stored to Date (D + E + F) (\$) | % of Scheduled Value (G / C) (%) | Balance to Finish (C - G) (\$) |              |
|                  |  |                      | (D + E) From Previous Application (\$) | This Period (\$) |   |  |                                  |                                |              |
| 250              | <b>PROCESS INTERCONNECTIONS</b>  |                      |  |                  |   |  |                                  |                                |              |
| 251              | Installation of Stop Plates and Logs   | \$ 3,717.00          |  |                  |   |  |                                  | 0%                             | 3,717.00     |
| 252              | Installation of Slide and Weir Gates   | \$ 38,241.00         |  |                  |   |  |                                  | 0%                             | 38,241.00    |
| 253              | Prefabricated Flumes   | \$ 3,087.00          |  |                  |   |  |                                  | 0%                             | 3,087.00     |
| 254              | Installation of Flumes   | \$ 2,955.00          |  |                  |   |  |                                  | 0%                             | 2,955.00     |
| 255              | <b>MATERIAL PROCESSING AND HANDLING EQUIPMENT</b>                              |                      |  |                  |   |  |                                  |                                |              |
| 256              | Cranes and Hoist   | \$ 73,952.00         |  |                  |   |  |                                  | 0%                             | 73,952.00    |
| 257              | Labor to install Cranes and Hoist  | \$ 19,948.00         |  |                  |   |  |                                  | 0%                             | 19,948.00    |
| 258              | <b>PROCESS GAS &amp; LIQUID HANDLING, PURIFICATION &amp; STORAGE EQUIPMENT</b> |                      |  |                  |   |  |                                  |                                |              |
| 259              | Air Sparging Blowers   | \$ 30,000.00         |  |                  |   |  |                                  | 0%                             | 30,000.00    |
| 260              | Labor to install Air Sparging Blowers  | \$ 3,192.00          |  |                  |   |  |                                  | 0%                             | 3,192.00     |
| 261              | Labor to install High Speed Blowers  | \$ 9,975.00          |  |                  |   |  |                                  | 0%                             | 9,975.00     |
| 262              | Labor to install Rotary Lobe Blowers   | \$ 9,975.00          |  |                  |   |  |                                  | 0%                             | 9,975.00     |
| 263              | Aluminum Domes   | \$ 456,750.00        |  |                  |   |  |                                  | 0%                             | 456,750.00   |
| 264              | Labor for Aluminum Domes   | \$ 204,750.00        |  |                  |   |  |                                  | 0%                             | 204,750.00   |
| 265              | Electrical Motors Install  | \$ 3,990.00          |  |                  |   |  |                                  | 0%                             | 3,990.00     |
| 266              | <b>WATER &amp; WASTEWATER EQUIPMENT</b>  |                      |  |                  |   |  |                                  |                                |              |
| 267              | Installation of step Screen and Washer   | \$ 4,788.00          |  |                  |   |  |                                  | 0%                             | 4,788.00     |
| 268              | Installation of Vortex Grit Chamber  | \$ 6,384.00          |  |                  |   |  |                                  | 0%                             | 6,384.00     |
| 269              | Installation of Grit Separator Classifier                                      | \$ 6,384.00          |  |                  |   |  |                                  | 0%                             | 6,384.00     |
| 270              | Installation of Mixers   | \$ 11,172.00         |  |                  |   |  |                                  | 0%                             | 11,172.00    |
| 271              | Density Current Baffles  | \$ 61,950.00         |  |                  |   |  |                                  | 0%                             | 61,950.00    |
| 272              | Labor to install   | \$ 15,960.00         |  |                  |   |  |                                  | 0%                             | 15,960.00    |
| 273              | Labor to install TERTIARY DISC FILTERS   | \$ 12,768.00         |  |                  |   |  |                                  | 0%                             | 12,768.00    |
| 274              | Labor to install UV System   | \$ 6,384.00          |  |                  |   |  |                                  | 0%                             | 6,384.00     |
| 275              | Labor to install Samplers  | \$ 798.00            |  |                  |   |  |                                  | 0%                             | 798.00       |
| 276              | <b>Budget Allowances</b>   |                      |  |                  |   |  |                                  |                                |              |
| 277              | Soils Testing Services   | \$ 20,000.00         |  |                  |   |  |                                  | 0%                             | 20,000.00    |
| 278              | Electrical Service   | \$ 75,000.00         |  |                  |   |  |                                  | 0%                             | 75,000.00    |
| 279              | Natural Gas Service  | \$ 20,000.00         |  |                  |   |  |                                  | 0%                             | 20,000.00    |
| 280              | Internet Service   | \$ 5,000.00          |  |                  |   |  |                                  | 0%                             | 5,000.00     |
| 281              | SCADA Computers  | \$ 40,000.00         |  |                  |   |  |                                  | 0%                             | 40,000.00    |
| 282              | Office Furniture   | \$ 20,000.00         |  |                  |   |  |                                  | 0%                             | 20,000.00    |
| 283              | Lab Equipment  | \$ 30,000.00         |  |                  |   |  |                                  | 0%                             | 30,000.00    |
| 284              | Shop Tools and Storage   | \$ 30,000.00         |  |                  |   |  |                                  | 0%                             | 30,000.00    |
| 285              | Truck Lift   | \$ 15,000.00         |  |                  |   |  |                                  | 0%                             | 15,000.00    |
| 286              | Skid Steer   | \$ 80,000.00         |  |                  |   |  |                                  | 0%                             | 80,000.00    |
| 287              | Algae Cloth  | \$ 5,000.00          |  |                  |   |  |                                  | 0%                             | 5,000.00     |
| 288              | Landscaping  | \$ 20,000.00         |  |                  |   |  |                                  | 0%                             | 20,000.00    |
| 289              | Plaque   | \$ 5,000.00          |  |                  |   |  |                                  | 0%                             | 5,000.00     |
| 290              | Blower Temporary Air   | \$ 75,000.00         |  |                  |   |  |                                  | 0%                             | 75,000.00    |
| 291              | <b>Pre-negotiated Items</b>  |                      |  |                  |   |  |                                  |                                |              |
| 292              | Diesel Engine Driven Generator/ Transfer Switch                                | \$ 298,618.00        |  |                  |   |  |                                  | 0%                             | 298,618.00   |
| 293              | Process Integration & Control  | \$ 1,371,706.00      |  |                  |   |  |                                  | 0%                             | 1,371,706.00 |
| 294              | Process Valves   | \$ 368,967.00        |  |                  |   |  |                                  | 0%                             | 368,967.00   |
| 295              | Stop Plates & Logs / Slide & Weir Gates  | \$ 349,387.00        |  |                  |   |  |                                  | 0%                             | 349,387.00   |
| 296              | High Speed Blowers & Rotary Lobe Blowers                                       | \$ 299,746.88        |  |                  |   |  |                                  | 0%                             | 299,746.88   |
| 297              | Dry Pit Pumps  | \$ 66,040.00         |  |                  |   |  |                                  | 0%                             | 66,040.00    |
| 298              | Torque Flow Grit Pumps   | \$ 26,285.00         |  |                  |   |  |                                  | 0%                             | 26,285.00    |
| 299              | Submersible Waste Water Pumps  | \$ 210,704.00        |  |                  |   |  |                                  | 0%                             | 210,704.00   |











### City of Waterloo Project Tracking - Budget & Funding Allocations

| A. Municipality                            | B. Project Number      | C. Date                     | D. Type of Request (Partial or Final) | E. Request Number     |                   |
|--|------------------------|-----------------------------|---------------------------------------|-----------------------|-------------------|
| City of Waterloo                           | WW-47/49/55/56/62/65   | 7/6/2023                    | Partial                               | 4                     |                   |
| Budget Allocations                         | Budget Amount          | Amount Previously Requested | This Claim                            | Claimed to Date       | Percent of Budget |
| E1 Land & Rights                           | \$60,000.00            | \$45,163.43                 | \$517.50                              | \$45,680.93           | 76.1%             |
| E2 Legal Services                          | \$10,000.00            | \$0.00                      | \$0.00                                | \$0.00                | 0.0%              |
| E3 Engineering - Design                    | \$1,060,100.00         | \$1,055,342.57              | \$0.00                                | \$1,055,342.57        | 99.6%             |
| E4 Engineering - Construction Admin        | \$897,000.00           | \$68,800.00                 | \$70,700.00                           | \$139,500.00          | 15.6%             |
| E5 Engineering - Inspections               | \$570,800.00           | \$55,482.75                 | \$27,679.50                           | \$83,162.25           | 14.6%             |
| E6 Engineering - Additional Services       | \$25,000.00            | \$12,269.26                 | \$0.00                                | \$12,269.26           | 49.1%             |
| E7 Development                             | \$16,307,800.00        | \$573,794.90                | \$542,292.47                          | \$1,116,087.37        | 6.8%              |
| E8 Bond Counsel                            | \$25,000.00            | \$17,000.00                 | \$0.00                                | \$17,000.00           | 68.0%             |
| E9 Interim Financing Interest              | \$500,000.00           | \$122,621.66                | \$0.00                                | \$122,621.66          | 24.5%             |
| E10 Other - Administrative/RD Coordination | \$27,500.00            | \$9,832.77                  | \$0.00                                | \$9,832.77            | 35.8%             |
| E11 Contingency                            | \$1,630,800.00         | \$9,837.00                  | \$0.00                                | \$9,837.00            | 0.6%              |
| <b>Total Costs</b>                         | <b>\$21,114,000.00</b> | <b>\$1,970,144.34</b>       | <b>\$641,189.47</b>                   | <b>\$2,611,333.81</b> | <b>12.4%</b>      |
| Funding Sources                            |                        |                             |                                       |                       |                   |
| 1. City Contribution Amount                | \$0.00                 | \$0.00                      | \$0.00                                | \$0.00                |                   |
| 2. USDA Loan Amount                        | \$17,114,000.00        | \$1,970,144.34              | \$641,189.47                          | \$2,611,333.81        | 15.3%             |
| 3. USDA Grant Amount                       | \$4,000,000.00         | \$0.00                      | \$0.00                                | \$0.00                | 0.0%              |
| 4. Supplemental Funding                    | \$5,900,311.00         | \$0.00                      | \$0.00                                | \$0.00                | 0.0%              |
| <b>Total Funding</b>                       | <b>\$27,014,311.00</b> | <b>\$1,970,144.34</b>       | <b>\$641,189.47</b>                   | <b>\$2,611,333.81</b> | <b>9.7%</b>       |

|                   |          |                   |      |       |      |
|-------------------|----------|-------------------|------|-------|------|
| <i>Amy M Baus</i> | 7/6/2023 | Rural Development | Date | Owner | Date |
| Engineer          | Date     |                   |      |       |      |

**Notes:**

**From:** [William S. Cole](#)  
**To:** [Joy Bisco](#); [Barry Sorenson](#)  
**Cc:** [Samuel H. Cox](#)  
**Subject:** RE: guidance  
**Date:** Thursday, June 29, 2023 2:59:06 PM  
**Attachments:** [image001.png](#)

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Joy,

Many years ago the public bidding threshold under the statute was \$10,000. It has been increased over the years and is now \$25,000. I assume the ordinance was drafted when the statute was at \$10K and the ordinance was not revised as the statute was amended. I would suggest the city amend the ordinance to read per the below. That way as the statute is further amended there is no need to correspondingly amend the code.

Bill

Construction, contracts and equipment. The Commission shall construct, extend, improve, operate and maintain the Utility, subject to the general control of the Council and the powers and jurisdiction of the Public Service Commission, provided that contracts for ~~public works projects the performance of work or purchase of materials which exceed \$10,000~~ shall be let by the Council according to law. (See § 62.15, Wis. Stats.)

## **William Cole**

Attorney

### **AXLEY ATTORNEYS**

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**Legal Assistant:** Samuel Cox  
Phone: 608.283.6793 | Email: [SCox@axley.com](mailto:SCox@axley.com)

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136 North Monroe Street, Waterloo, Wisconsin 53594-1198  
Phone (920) 478-3025  
Fax (920) 478-2021

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**ORDINANCE #2023-14**  
**340-2 D. (2) WATER AND LIGHT UTILITY COMMISSION**

**§ 340-2 Water and Light Utility Commission.**

- A. Meetings. The Water and Light Utility Commission shall hold regular monthly meetings and such special meetings called by the Chairperson or by a majority of the Commission as may be deemed necessary. Notice of every special meeting shall be given to each member. The times of holding regular meetings and the manner of calling special meetings shall be prescribed by the rules or bylaws of the Commission. Notice of all meetings shall be given in compliance with the Wisconsin Open Meeting Law.
- B. Quorum. Three Commissioners shall constitute a quorum.
- C. Record of proceedings to be kept. The Commission shall keep a full and accurate record of its proceedings and transactions.
- D. Powers and duties.
- (1) General. The Commission shall take entire charge and management of the Utility, appoint a manager and authorize such subordinates as may be necessary and fix their compensation and shall supervise the operation of the Utility under the general control of the Council, pursuant to § 66.0805, Wis. Stats.
  - (2) Construction, contracts and equipment. The Commission shall construct, extend, improve, operate and maintain the Utility, subject to the general control of the Council and the powers and jurisdiction of the Public Service Commission, provided that contracts for public works projects ~~the performance of work or purchase of materials which exceed \$10,000~~ shall be let by the Council according to law. (See § 62.15, Wis. Stats.)
  - (3) Policy. The Commission shall establish written policies to govern the Utility operations to cover employees' duties, customer rates, services, rules and termination procedures, expenditures of funds and other appropriate policies.
  - (4) Surety bonds. The Commission may require surety bonds for any of the officers and employees of the Utility in such amounts as the Commission deems necessary. The premiums for the bonds shall be paid by the Utility in the same manner as any other operating expense.
  - (5) Extension of water services. The Utility may extend water services beyond the City limits only to the extent authorized by the Council, pursuant to § 66.0813, Wis. Stats.
  - (6) Rates. Rates shall be sufficient to pay all operating and maintenance expenses of each respective utility operation and all bond interest and redemption costs of the respective utility operation. All electric, heat and water rates shall be established by the Wisconsin Public Service Commission.
  - (7) Disbursements. No money shall be drawn from the funds of the Utility nor shall any obligation for the expenditure of money be incurred, except in conformity with authorization by the Commission. No claim against the Utility shall be paid unless evidenced by a voucher approved by the Commission. All bills of the Utility shall be approved by the Commission, and said bills shall be paid out of the City treasury pursuant to § 66.0607(4), Wis. Stats., and shall be signed by the Clerk-Treasurer and countersigned by the President and the Secretary of the Commission.

- (8) Investment of surplus funds. The Commission may invest surplus funds of the Utility only as authorized by § 66.0811(2), Wis. Stats.
- (9) Budget. The Commission shall, annually, supervise and be responsible for the preparation of a separate budget for each utility.
- (10) Audit. The funds and accounts of the Utility shall be audited annually by a certified public accountant and shall be open to public inspection.

**Adopted** at a regular meeting of the Common Council on \_\_\_\_\_, 2023.

**CITY OF WATERLOO**

Signed: \_\_\_\_\_  
Jenifer Quimby, Mayor

Attest: \_\_\_\_\_  
Jeanne M. Ritter, Clerk/Deputy Treasurer

Date Adopted:

Date Published:

# City of Waterloo

## Senior Housing Market Assessment




DRAFT – July, 2023





# City of Waterloo Senior Housing Market Assessment



DRAFT – June, 2023

Prepared for:

City of Waterloo  
136 North Monroe Street  
Waterloo, Wisconsin 53594

Prepared by:

Cedar Corporation  
1695 Bellevue Street  
Green Bay, Wisconsin 54311

Cedar Corporation Project Number: 06714-0001/021-02G

## Acknowledgements

### **Mayor**

Jenifer Quimby

### **City Council**

Tim Thomas, Council President

Ron Griffin

Charles Kuhl

Jeanette Petts

Rich Weihert

Sara Cummings

Austin Kuhl

### **Plan Commission**

Jenifer Quimby, Mayor

Jeanette Petts

Sean Empey

Barry Sorenson

Lindsay Chadwick

Robert Crosby

Mitch Leisses

### **Clerk/Treasurer**

Jeanne Ritter, Clerk/Deputy Treasurer

Lana Nelson, Treasurer/Deputy Clerk

### **Economic Development Staff**

Everett Butzine, Non-Metro Connections

*This report was funded through a grant from the Wisconsin Economic Development Corporation (WEDC) and financials support from THRIVE Economic Development, the Greater Watertown Community Foundation, Jefferson County and Dodge County.*

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# 1 Background & Introduction

## BACKGROUND

This study was prepared by Cedar Corporation for the City of Waterloo through a grant from the Heartland Housing Initiative (HHI). The Heartland Housing Initiative was created and funded by ThriveED in partnership with the Greater Watertown Community Health Foundation, Dodge County, Jefferson County, and the Wisconsin Economic Development Corporation (WEDC) through a Capacity Building grant to help meet today's and tomorrow's housing needs.



The provision of housing has become an increasingly greater challenge for municipalities. Having a sufficient supply of a range of housing to attract and retain workers helps support the economic vitality of a community. However, while many communities wish to attract housing developments, they often don't know where to begin. A lack of staff, resources and expertise to focus on addressing the housing shortage is just one of many barriers communities face.

The Heartland Housing Initiative was created to bring residential housing development assistance to communities within Dodge and Jefferson Counties. ThriveED subsequently partnered with Cedar Corporation and its sub-consultant, Movin' Out (a non-profit Madison-area housing organization) to provide eligible municipalities with development-focused consulting services. These consulting services were made available through a formal application process on a first come, first served basis at no cost to the community. Services offered through the HHI program included, but were not limited to:

- Helping municipalities identify key parcels appropriate for attainable housing unit developments.
- Performing site feasibility study to determine if a site is able to support housing.
- Preparing site level information for use in marketing the site to builders/developer, similar to WEDC's Gold Shovel Certification program but modified for residential site use.
- Helping municipalities develop and distribute RFPs to attract housing unit developers to key

- parcels, and/or proposing other options to attract housing unit developers.
- Helping municipalities review housing development proposals/responses to RFPs.
  - Reviewing of proposed attainable housing development proformas on behalf of municipalities.
  - Assisting municipalities with analysis and potential use of existing tax incremental funds to encourage attainable housing unit development.
  - Assisting municipalities in the strategic identification of other public, private and non-profit funding and program resources which can support attainable housing projects and initiatives.
  - Identifying gaps impeding attainable housing unit development investments at the municipal level (potential review of zoning or land use processes and/or land and development costs (infrastructure, etc.) that would make the desired development impossible to cash flow given market rates, etc.).

The purpose of the program, from a State level, is to learn more about the barriers that communities face in terms of actually attracting new housing development and hence funding was not available to conduct the typical “housing studies” that identify local supply and demand statistics. Rather, this program was developed to build off of those studies by putting communities in a better position to realize new housing construction.

## STUDY PURPOSE

There are several methods for examining the senior housing market and a number of factors which need to be considered. Simply looking at supply as compared to demand (an aging population), would give an obvious answer that “Yes! There is a market for senior housing!” Unfortunately, it is not that simple. While the basic premise is true, a better understanding of what that market might be, and how it might be defined is needed in order to create development strategies and recommendations for the future. For example, how big is the market? Where is the market? What is the target demographic within that market? Who are your competitors? And ultimately, answering the all-important question of “why live or retire in Waterloo?”

The purpose of this study is to provide information and perspective on the market for senior housing within and near the City of Waterloo. The City of Waterloo has formally identified senior housing as a need within the community as part of its 2021-2026 Comprehensive Plan Update, specifically as one of the 5-year priorities under the Land Use, Housing and Neighborhoods element. The study process entailed several steps and the information presented in this study was compiled through the following processes:

- Defining a Market Area which considers the proximity of other communities with senior housing options available.
- Gathering and analyzing socio-demographic data, including projected populations for certain age cohorts, for the City and market area.

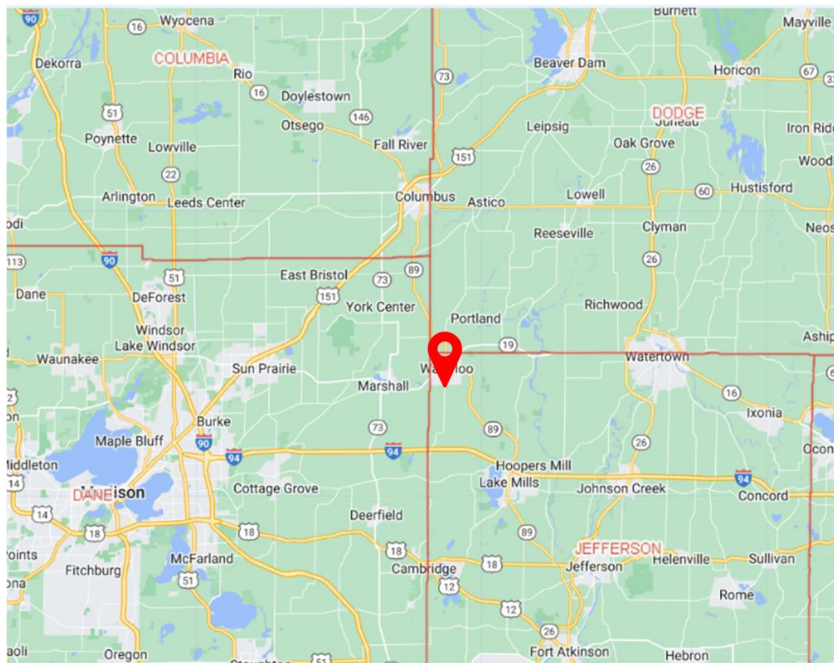
- Inventorying general assisted living and independent congregate housing within the market area.
- Projecting demands for market-rate and affordable independent living housing for the market area.
- Projecting the demands for assisted living and independent congregate housing for the market area.
- Developing recommendations related to potential development opportunities within the City of Waterloo.

## SETTING AND CONTEXT

Strategically located between Madison and Milwaukee, the City of Waterloo prides itself on its small town charm at an affordable price, abundant outdoor recreational opportunities, great schools - both public & private, and low cost utilities. The City had a 2022 total population of 3,479 and is home to a number of large employers including Trek Bicycle, McKay Nursery, Sussek Machine, Sheehy Mail Contractors, and Van Holten Pickle.

The City of Waterloo is located in the extreme northwestern corner of Jefferson County (Figure 1) and right on the border of Dane and Dodge Counties. A number of larger communities exist within an approximate 30-minute drive time, including Madison, Sun Prairie, Columbus, Beaver Dam, Watertown, Oconomowoc and Jefferson.

**Figure 1: Location, City of Waterloo**

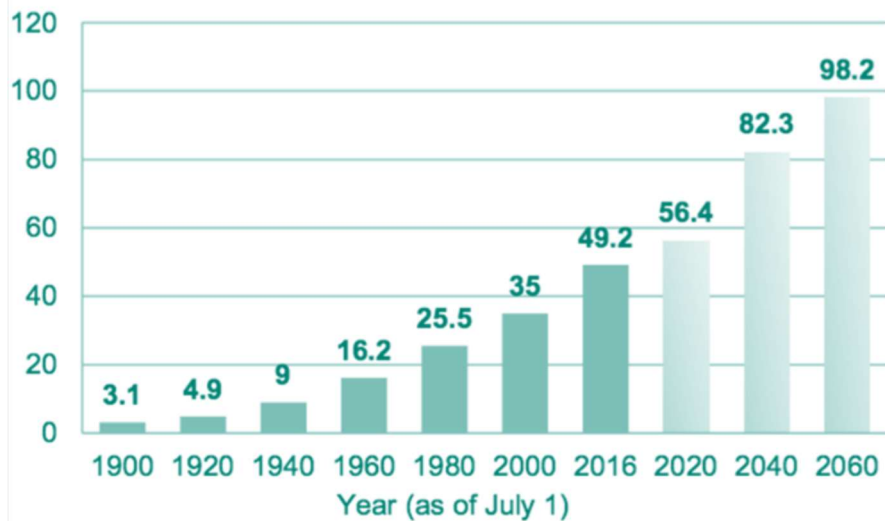


## A NATIONAL & STATE PERSPECTIVE

The current growth of the population, ages 65 and older, driven largely by the baby boom generation, is unprecedented in U.S. history. As this group of people has passed through each major stage of life, baby boomers, born between 1946 and 1964, have brought both challenges and opportunities to the economy, infrastructure, and institutions of our country. We can see here that according to the U.S. Census Bureau the number of Americans ages 65 and older is projected to nearly double from 2020 to 2060 (Figure 2).

The effects this group is going to have on the country as they age can already be seen. By 2030, in less than 10 years, all of the baby boomers will be at least 65 years of age. At that point, Americans, over the age of 65, will outnumber children for the first time in U.S. history.

**Figure 2: Number of Persons Ages 65 and Over, 1900-2060 (in millions) – U.S. Census Bureau**



As described in detail

later in this report, we also expect to see an increase in the number of individuals in Wisconsin over the age of 65 living at or below the poverty rates. We know from statistics that poverty rates increase as people age, nearly doubling from the age of 60 to the ages of 85+. As Wisconsin's aging population grows so will the need for housing.

In addition, according to the Jefferson County ADRC, dementia cases will also increase as the population ages. Jefferson County, for example, is expected to see an increase in the percentage of individuals living with dementia, from around 15 % in 2015 up to 24% in 2040. These individuals require unique supports and services to age safely and with a high quality of life.

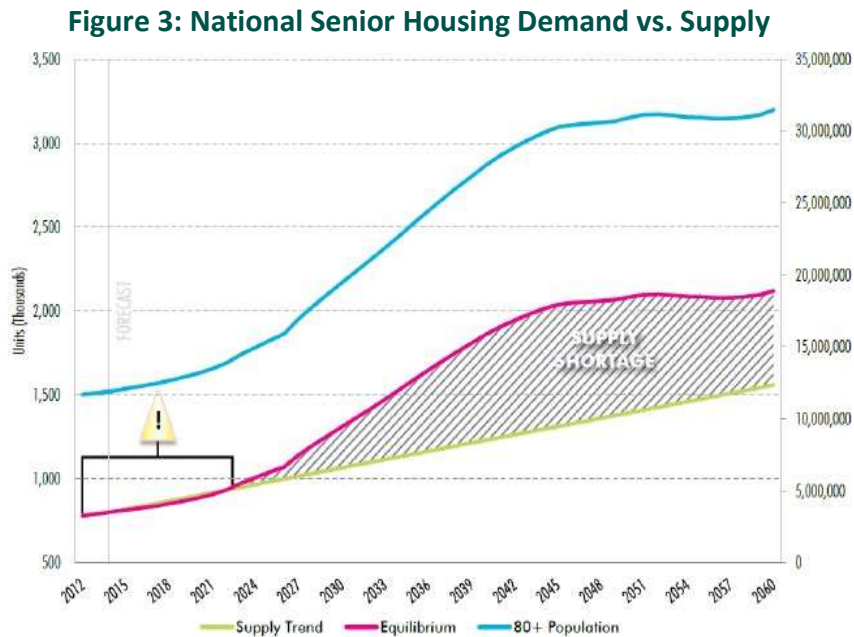
## NATIONAL MARKET SUMMARY

While it is interesting to look at localized market conditions, it is helpful to have some national level perspective. However, such information must be tamed by the consideration of regional differences. Obviously, the markets in warm-weather states may be drastically different from those in the upper Midwest. According to the CBRE’s *2022 Senior Housing & Care Market Mid-Year Report*, which focuses on the real estate aspect of senior housing, the senior housing market will perform well as it is being driven by several factors including:

1. The aging of baby boomers, a steady housing market, and an attractive spread between borrowing and capitalization rates.
2. Seniors who are becoming more educated about the benefits of living in senior housing and have the financial capacity to take advantage of the numerous service options available to them.
3. The national average occupancy is steady and strong, and absorption rates\* of new senior housing supply remains healthy (approximately 83% occupancy and 5.1% absorption during the past four quarters per NIC MAPVISION’s 4<sup>th</sup> Quarter 2022 report).

**\*Absorption** is the amount of space or units occupied within a market over a given period of time, typically one year. Absorption considers both construction of new space and removal of existing space and/or units. In general, absorption represents the demand for a type of real estate contrasted with supply. For example, 200 housing units constructed with 50 sold per year = 25% absorption rate.

Additional information (Figure 3) from CBRE shows the supply and demand are nearly equal for the next 3 to 5 years, but then, an increasing shortage is expected beyond 2022 for considerable number of years.



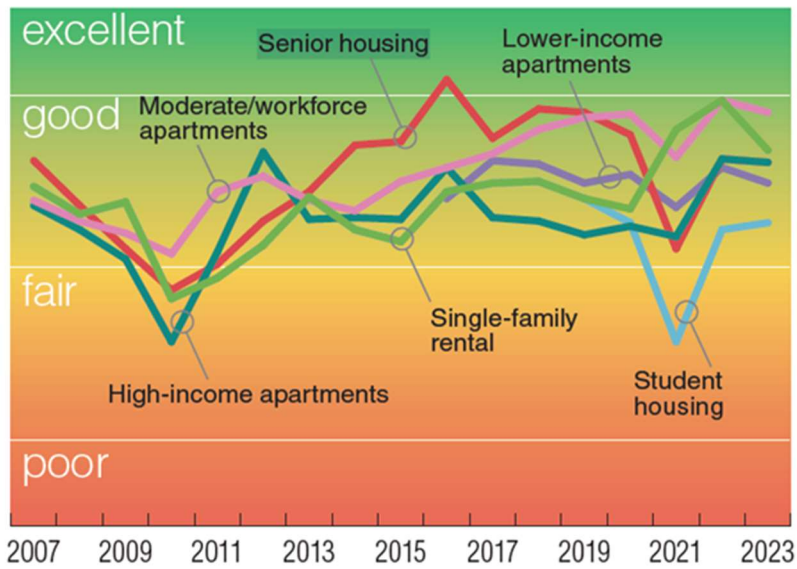
Source: NIC MAP and US Census Bureau

Source: “Valuation of Senior Housing Properties”, Zach Bowyer, CBRE July, 2015



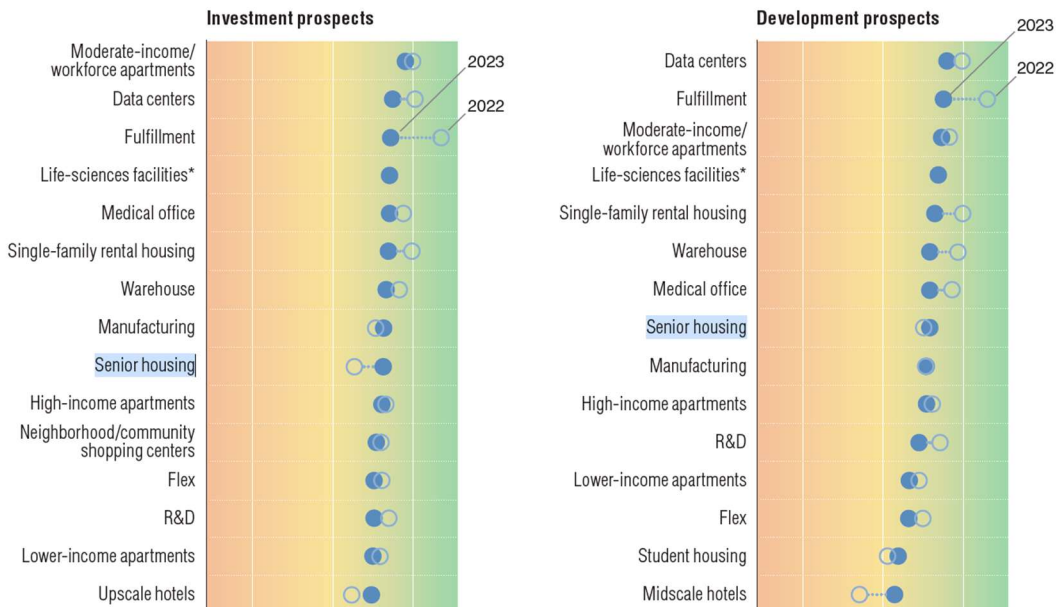
Information sourced from surveys conducted as part of the preparation of the *2023 Emerging Trends in Real Estate* report (produced by the Urban Land Institute) show that apartment investment prospects, particularly senior housing, remain good with pre-pandemic highs being repeated in the next several years (Figure 4). Additionally, Figure 5 illustrates that senior housing prospects remain in the top ten types of development, along with an expected increase from 2022 to 2023.

**Figure 4: Apartment Investment Prospect Trends**



Source: *Emerging Trends in Real Estate* surveys.

**Figure 5: Prospects for Commercial & Multifamily Subsectors 2023 vs. 2022**



## 2 SENIOR HOUSING SUPPLY

### DEFINITIONS FOR SENIOR HOUSING

Defining “senior housing facilities” for the purposes of this report is a necessity. Three basic types of housing, along with several sub-types, exist for seniors based on their needs and desires for lifestyle and health care:

1. Market Rate Housing is comprised of standard small single-family units, apartments, townhouses, or condominiums which may be suitable in size and location for seniors. Such units are typically priced at market rates (with some subsidized) and vary widely depending on size, location, and amenities.
  
2. Independent Living Units are age-restricted apartments, often designed to accommodate the physical and social needs of seniors. These units can include both market rate and affordable housing. Community atmosphere and age-appropriate services make these units attractive to seniors who can live independently, allowing them to maintain an active lifestyle. The following models typically exist:
  - Lifestyle Communities that appeal to resident choice. These may be self-contained resort communities offering amenities and services on-site, or downtown “loft” senior facilities which are in vibrant areas close to a wide variety of off-site entertainment and services. A key characteristic of these facilities is they cater more to the wants of seniors rather than needs. Lifestyle communities are distinguished in part by their unique and appealing facility design. Such facilities often have architecturally significant design and/or recreation facilities meant to appeal to the taste of potential residents.
  
  - Independent Living communities are similar to lifestyle communities whereby they offer unit amenities to attract senior residents who are able to live without supportive services. Amenities targeted to seniors typically include safety features, such as grab bars, emergency call systems, and intercom access at the building entrance. Senior services, such as housekeeping, transportation, and laundry, may or may not be offered to residents, and usually for an additional fee if available. The primary difference between independent living and lifestyle communities is their location and facility design. Independent living communities less often have a distinctive facility design and are located in non-resort and non-downtown locations.

- Congregate Living facilities are similar to independent living with convenience services, but with added meal plans, housekeeping, laundry service, and medical management services. Congregate facilities may also offer personal care assistance. Rents are often higher for a congregate facility than for an independent living community, with the increased rent being due to the availability of optional a la carte services.
3. Assisted Living Units are just as they sound. Based on the Wisconsin Department of Health Services' definition, four types of assisted living facilities are licensed by the State and traditionally found in communities across Wisconsin:
- Adult Family Homes (AFH): An Adult Family Home is a place where adults who are not related to the operator reside and receive care, treatment or services that are above the level of room and board and that may include up to seven hours per week of nursing care per resident. The minimum age requirement for residing in an Adult Family Home is 18 years. This definition pertains only to three-bed and four-bed Adult Family Homes, which are regulated by the State. One-bed and two-bed Adult Family Homes are regulated by individual county human services departments. Adult Family Homes can admit and provide services to people of advanced age, persons with dementia, developmental disabilities, mental health problems, physical disabilities, traumatic brain injury, AIDS, Alcohol and Other Drug Abuse, correctional clients, pregnant women needing counseling and/or the terminally ill.
  - Residential Care Apartment Complexes (RCAC): An RCAC is an independent apartment complex where five or more adults reside. Apartments must each have a lockable entrance and exit; a kitchen, including a stove (or microwave oven); and individual bathroom, sleeping and living areas. An RCAC does not include a nursing home or a community-based residential facility but may be physically part of a structure that is a nursing home or community-based residential facility. Sizes of RCACs can vary. Currently, RCACs range from 5-109 individual apartments, with the average complex size being 36 apartments.
  - Community Based Residential Facilities (CBRF): A CBRF is a home or apartment type setting where five or more unrelated adults live together. The goal of the CBRF is to assist individuals in achieving the highest level of independence of which they are capable. Different populations are targeted by the CBRF and some of these populations include elderly, Alzheimer's, emotionally and mentally disturbed, developmentally and physically disabled, and veterans. A CBRF is required to provide assistance with bathing, dressing, grooming, medication, community and in-house activities, information and referral services, health monitoring, and meals. They are not required to have professional nurses on duty 24 hours a day but do have staff available at all times.
  - Adult Day Care (ADC): This includes nursing homes and memory care facilities providing intensive, 24-hour care for nearly all personal needs of residents. Most residents of these facilities have physical, mental, or other health issues that do not allow them to care for themselves.



## SUPPLY ANALYSIS

When examining the supply of senior housing, one must consider not only those facilities located wholly within the City of Waterloo, but also the facilities that are within close proximity to Waterloo. This analysis attempts to document those facilities that exist locally, as well as creating a defined Market Area to examine the broader regional setting.

### CITY OF WATERLOO SENIOR LIVING FACILITY INVENTORY

To help accommodate the needs of seniors as they age, the City of Waterloo has five (5) senior living complexes within its boundaries. These facilities are located in various portions of the community, with some offering the conveniences of living in a walkable neighborhood, close to downtown.

#### 1) Highland House – 161 Goehl Road

Now owned by Illuminus, Highland House is a small Residential Care Apartment Complex (RCAC) with a 20 person capacity which offers services ranging from simple activity support to daily care.

According to their staff, 10 vacancies currently exist and, since the COVID-19 Pandemic, the facility has been at about 50% of capacity. In addition, the average residents' cost was quoted at approximately \$5,000/month.



#### 2) Hawthorne Senior Apartments – 1085 Jaystone Terrace

Owned by Diamond Property Management, LLC, Hawthorne Senior Apartments is a 55+ residential facility with 24 total rental units offering no care or additional services. Each floor has coin operated laundry, underground parking, and second floor elevator access. Each unit has ample closet space, spacious bathrooms & all appliances are included. Discussions with the facility manager stated that three vacancies currently exist (as of May, 2023), all being 1 bedroom/1 bath apartments with rents ranging from \$795-845/month.



3) Victory Vision Community Living (North) – 734 N. Monroe Street

Part of the Bethesda Lutheran Communities organization, this is a Non-Ambulatory CBRF with a capacity of 6 persons. This facility served advanced age, developmentally disabled, physically disabled, emotionally disturbed, and traumatic brain injury clients. Estimated monthly costs were quoted as \$3,077/mo. but varies with care needs (mycaringplan.com). No vacancies are currently listed.



4) Riverwalk Senior Living – 477 W. Madison Street

Riverwalk Senior Living is a small Residential Care Apartment Complex (RCAC) located in the heart of the City. Riverwalk specializes in care and daily living assistance and has 28 units. The facility is currently at capacity and does have a waiting list. Average monthly costs were not available at the time the facility was contacted.



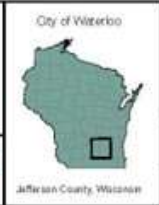
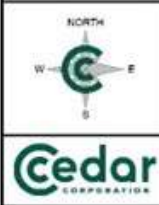
5) Victory Vision Community Living (East) – 968 E. Madison Street

Part of the Bethesda Lutheran Communities organization, this is a Non-Ambulatory CBRF with a capacity of 6 persons. This facility served advanced age, developmentally disabled, physically disabled, emotionally disturbed, and traumatic brain injury clients. Estimated monthly costs were quoted as \$4,500/mo. but varies with care needs (senioradvice.com). No vacancies are currently listed.



Within the five identified facilities, a total capacity of 84 units exist, with 13 known vacancies, or about an 85% occupancy rate. These occupancy rates can vary at any given time, but in general, appear to align with national trends. According to the latest NIC MAP Vision Data, the senior housing occupancy rate increased 1.0 percentage point from 81.2% in the second quarter of 2022 to 82.2% in the third quarter of 2022. Occupancy is up 4.3 percentage points from a pandemic low of 77.9% in the second quarter of 2021. Demand has rebounded more strongly for assisted living than independent living.

### Map 1 - City of Waterloo, Existing Senior Living Sites



**City of Waterloo**  
Jefferson County, WI

0 5 10 Miles

The information on this map is for informational purposes only and does not constitute a contract or offer of any financial product. Please consult your advisor for more information.

*See keyed descriptions in report for site information*

Map updated May 2, 2023

## MARKET AREA INVENTORY OF SENIOR LIVING FACILITIES

Senior living facilities don't exist within every community and are typically non-existent within rural areas. Therefore, as the population ages, coupled with continued housing shortages, many people will need to consider moving in order to find senior housing offering care that fits their needs. From a resident attraction standpoint, it was felt that a reasonable drive from family and friends, as well as the general familiarity of area communities, would be about a 30 minute drive time. Therefore, for the purposes of this study, the Market Area will be defined as such.

To further assess the availability of senior living facilities within the 30 minute drive time Market Area, five separate 'drive time' boundaries were created using 5 minute increments, beginning with 10 minutes and ending with 30 minutes (See Map 2). These drive time boundaries were then combined with senior housing facility data obtained from the Wisconsin Department of Health Services to produce Map 3 and Table 1 showing the number and types of facilities as they relate to the different drive times. A complete, detailed listing of facilities is contained in Appendix A.

**Table 1: Summary of Senior Living Facilities by Drive Time Distance from Waterloo**

| Senior Living Facility Type                 | Number of Facilities within Drive Time Distance |                 |                 |                 |                 |
|---|---|-----------------|-----------------|-----------------|-----------------|
|   | 0-10<br>Minutes                                 | 0-15<br>Minutes | 0-20<br>Minutes | 0-25<br>Minutes | 0-30<br>Minutes |
| Community Based Residential Facility (CBRF) | 3   | 6               | 21              | 50              | 112             |
| Residential Care Apt. Complex (RCAC)        | 2   | 2               | 4               | 9               | 18              |
| Adult Family Home (AFH)                     | 0   | 1               | 7               | 25              | 63              |
| Adult Day Care (ADC)                        | 0   | 0               | 1               | 1               | 4               |
| Nursing Home (NH)                           | 0   | 1               | 3               | 8               | 12              |
| Hospice                                     | 0   | 0               | 0               | 3               | 5               |
| <b>Totals</b>                               | <b>5</b>  | <b>10</b>       | <b>36</b>       | <b>96</b>       | <b>214</b>      |

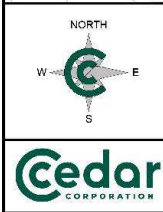
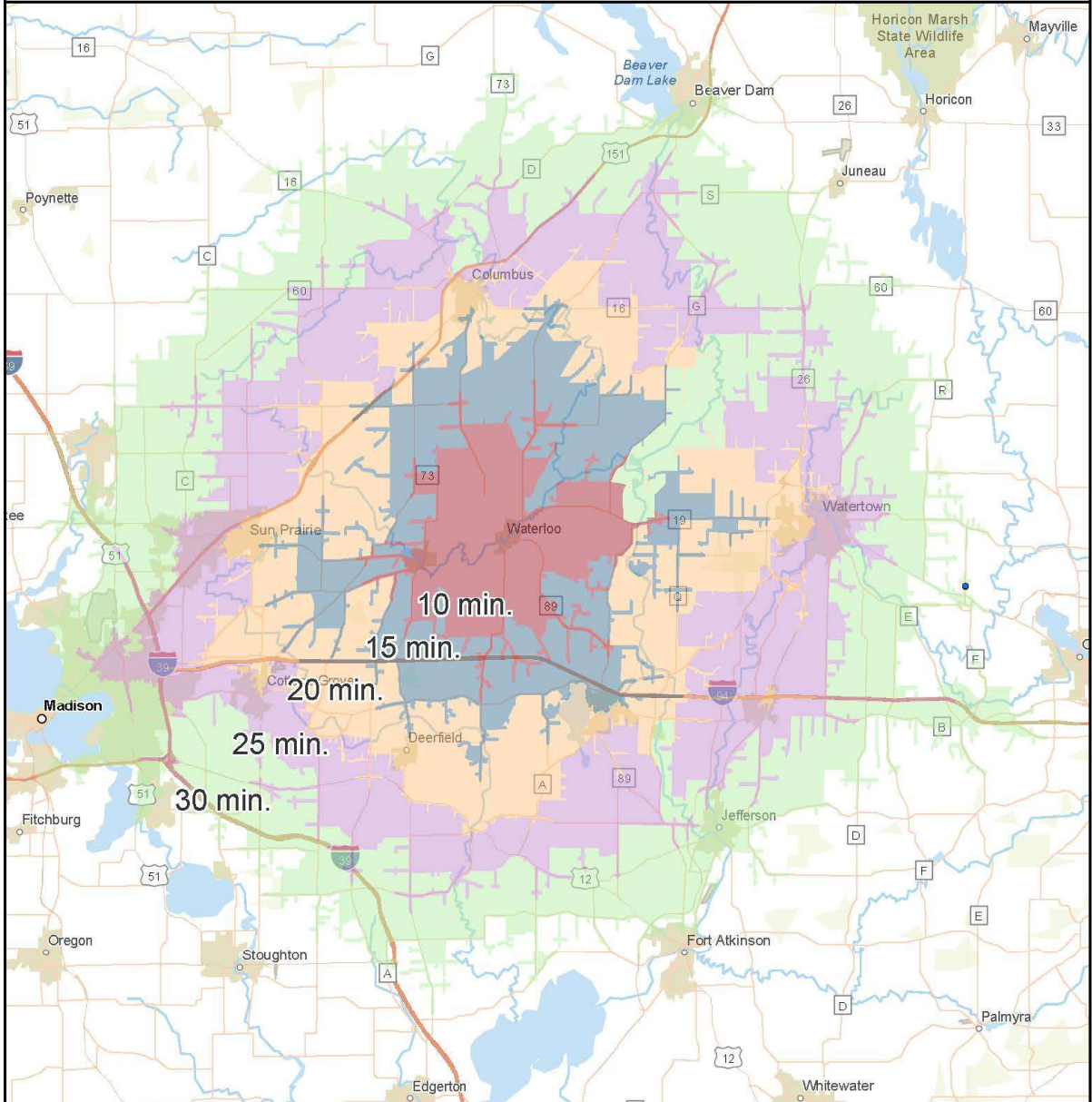
Source: Wisconsin Dept. of Health Services, 2022 and ESRI Business Analyst, 2023.

In total, there are 214 total senior living facilities within the defined Market Area of the City of Waterloo, with a majority (112) of them being CBRFs. Adult family homes rank second in terms of number of facilities with 63, and Residential Care Apartment Complexes (RCACs) third with 18 facilities. It should be noted that there are very few Adult Day Care and Hospice facilities (9 total combined) within the Market Area.

Based on the data provided, the 214 senior living facilities have a total capacity (units) of 4,492 (Table 2). Occupancy rates were not available in the data set, but if the national average of 83% occupancy is applied, 3,728 units are filled, leaving 764 units open.



## Map 2 - Drive Time Boundaries, City of Waterloo



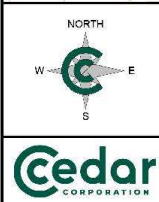
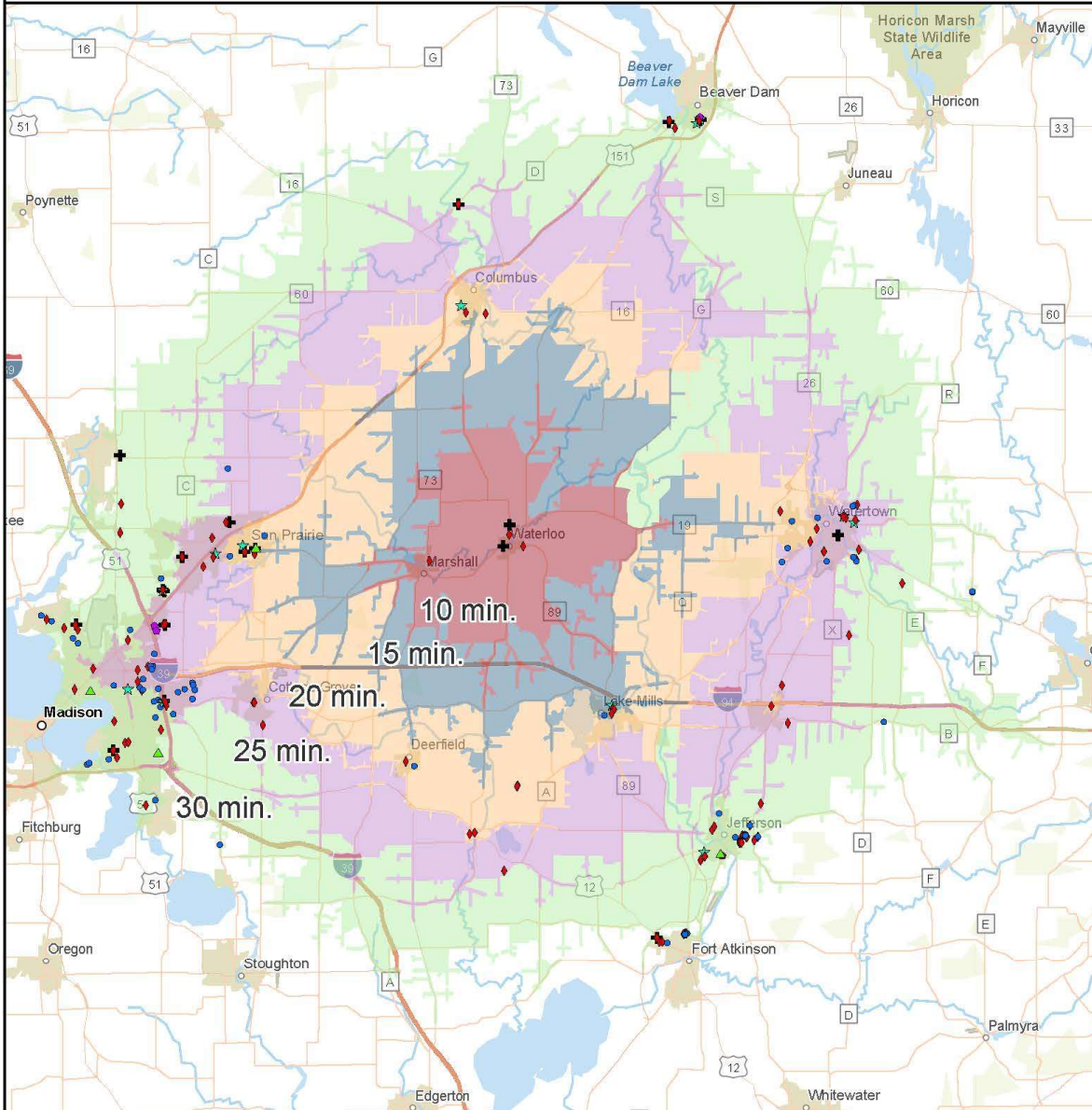
**City of Waterloo**  
Jefferson County, WI

0 5 10 Miles

The information on this map is from a computer database accessed through Geographic Information System (GIS) software. Cedar Corporation does not warrant the accuracy of the information shown on this map. Cedar Corporation is not responsible for any errors or omissions in this map or any other information derived from it.

Map Updated: May 2, 2023

### Map 3 - Senior Living Facilities w/in 30 minute Drive Time of Waterloo



**City of Waterloo**  
Jefferson County, WI

0 5 10 Miles

The information on this map is from a computer database accessed through Geographic Information System (GIS) software. Cedar Corporation does not warrant the accuracy, completeness, or timeliness of the data. Each user of this map is responsible for determining its suitability for their intended use of the map.

**Legend**

- ▲ Adult Day Care Center
- Adult Family Home
- ★ Nursing Home
- ◆ Community Based Residential Facility
- + Residential Care Apartment Complex
- Hospice

Map Updated: May 2, 2023

**Table 2: Summary of Senior Living Facilities & Capacity by Drive Time Radius From Waterloo**

| Drive Time Radius | # of Facilities | Total Capacity |
|-------------------|-----------------|----------------|
| 0-10 min.         | 6               | 101            |
| 10-15 min.        | 5               | 122            |
| 15-20 min.        | 26              | 612            |
| 20-25 min.        | 60              | 1416           |
| 25-30 min.        | 117             | 2241           |
| <b>Totals</b>     | <b>214</b>      | <b>4492</b>    |

Source: WI Dept. of Health Services, 2022., ESRI, 2022.

From a geography standpoint, most of the listed facilities lie within the Madison Metro Area and within the City of Watertown, although smaller clusters exist within the Cities of Jefferson, Fort Atkinson, and Beaver Dam. Table 3 illustrates the distribution of these facilities, and their associated capacity by community. Table 4 illustrates the distribution of facilities and capacity within portions of the four counties which comprise the 30-minute drive time distance.

**Table 3: Summary of Senior Living Facilities & Capacity by Community within 30 Min. Drive Time Distance from Waterloo**

| Community     | # of Facilities | Total Capacity |
|---------------|-----------------|----------------|
| Beaver Dam    | 8               | 397            |
| Cambridge     | 5               | 88             |
| Columbus      | 5               | 162            |
| Cottage Grove | 3               | 54             |
| Deerfield     | 2               | 13             |
| Deforest      | 8               | 105            |
| Fall river    | 2               | 56             |
| Fort Atkinson | 13              | 104            |
| Helenville    | 1               | 4              |
| Ixonia        | 4               | 16             |
| Jefferson     | 30              | 447            |
| Johnson Creek | 3               | 94             |
| Lake Mills    | 5               | 122            |
| Madison       | 66              | 1417           |
| McFarland     | 1               | 40             |
| Marshall      | 1               | 20             |
| Monona        | 7               | 213            |
| Stoughton     | 1               | 4              |
| Sun Prairie   | 17              | 496            |
| Waterloo      | 5               | 81             |
| Watertown     | 27              | 559            |
| <b>Totals</b> | <b>214</b>      | <b>4492</b>    |

Source: WI Dept. of Health Services, 2022., ESRI, 2022.



**Table 4: Summary of Senior Living Facilities & Capacity by County within 30 Min. Drive Time Distance from Waterloo**

| <b>County</b> | <b># of Facilities</b> | <b>Total Capacity</b> |
|---------------|------------------------|-----------------------|
| Columbia      | 7                      | 218                   |
| Dane          | 110                    | 2442                  |
| Dodge         | 20                     | 829                   |
| Jefferson     | 77                     | 1003                  |
| <b>Totals</b> | <b>214</b>             | <b>4492</b>           |

*Source: WI Dept. of Health Services, 2022., ESRI, 2022.*

## 3 SENIOR HOUSING DEMANDS

### DEMAND ANALYSIS

A number of indicators can be looked at to better gauge the future demand for senior housing in Waterloo. In this case, the “future” will be defined based on two different time-periods according to the data that is available. One will be for a period of approximately 20 years (2040 time-horizon) for which demographic and age projections have been produced by the State of Wisconsin for municipalities and counties. The second time period will be for 5 years and is more focused on the aforementioned Market Area with age cohort projections provided using ESRI’s Business Analyst tool. Three indicators of demand were looked at for Waterloo including: Past Housing Demand, Internal Population Growth (City), and External Population Growth (County and Market Area).

#### Past Housing Demand

Historic housing trends can often be looked at in order to project needs moving forward. However, in this case, the City of Waterloo has a limited track record when it comes to higher density developments, much less those tailored to senior populations. Therefore this indicator will not be looked at further as it is unlikely that any trends can be identified. As illustrated in the inventory of facilities for Waterloo, however; there are relatively few vacancies available, which does imply there may be a demand for additional units.

#### Internal Population Growth

Overall population growth can be an indicator as a portion of the total future population will require senior housing as the age cohorts shift. As shown in Table 5, an additional 202 persons are expected to be gained within the City between 2020 and 2040, or approximately ten people per year. The projected growth rate is significantly smaller for the next 20 years (+0.5%) versus the past 20 years (+6.9%) and follows a trend for small communities in Wisconsin. Many small communities have passed, or are approaching, their peak projected population which is being impacted by the aging of the population and different lifestyle demands of younger generations.

**Table 5: City of Waterloo Historic and Projected Population, 2000-2040**

|                       | 2000 | 2010 | 2020 | Difference 2000-2020 | 2025 | 2030 | 2035 | 2040  | Difference 2020-2040 |
|-----------------------|------|------|------|----------------------|------|------|------|-------|----------------------|
| <b>Number</b>         | 3259 | 3333 | 3483 | 224                  | 3585 | 3665 | 3690 | 3685  | 202                  |
| <b>Percent Change</b> | n/a  | 2.3% | 4.5% | 6.9%                 | 2.9% | 2.2% | 0.7% | -0.1% | 0.5%                 |

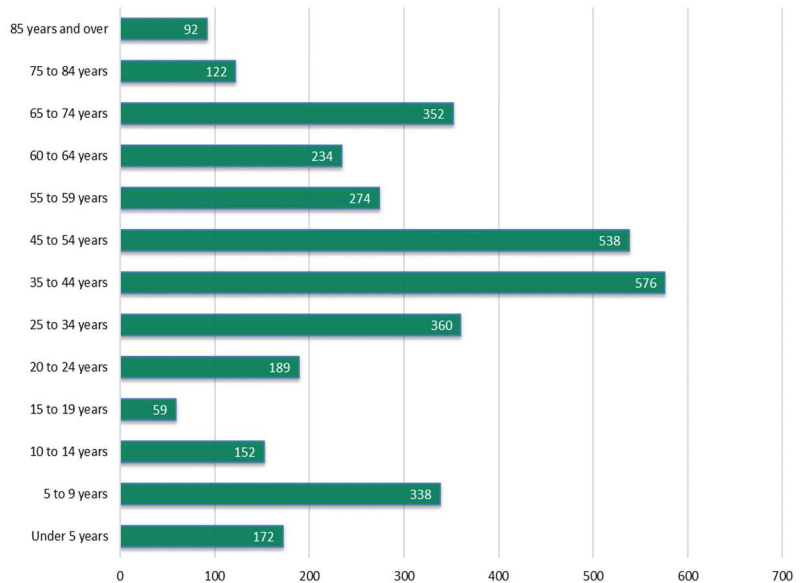
Source: US Census Bureau / WI Dept. of Administration, 2013.

As shown in Table 6 and Figure 6, during the ACS 2017-2021 5-Year time period there were already 566 persons 65 years or over within the City, or about 16.4% of the total population. An additional 812 persons lie within the 45 to 64 years age cohort and, assuming these individuals stay within the community, this group will be entering the 65+ age group in about 5 to 15 years. This ‘aging of the population’ locally provides a nearby (albeit “time-based”) market of individuals who may need some type of senior housing in the near future.

**Table 6: City of Waterloo Population Age Distribution, 2017-2021**

| Age Cohort                | Number      | Margin of Error (+/-) |
|---------------------------|-------------|-----------------------|
| Under 5 years             | 172         | 84                    |
| 5 to 9 years              | 338         | 121                   |
| 10 to 14 years            | 152         | 92                    |
| 15 to 19 years            | 59          | 28                    |
| 20 to 24 years            | 189         | 93                    |
| 25 to 34 years            | 360         | 145                   |
| 35 to 44 years            | 576         | 193                   |
| 45 to 54 years            | 538         | 198                   |
| 55 to 59 years            | 274         | 124                   |
| 60 to 64 years            | 234         | 104                   |
| 65 to 74 years            | 352         | 154                   |
| 75 to 84 years            | 122         | 76                    |
| 85 years and over         | 92          | 99                    |
| <b>Median age (years)</b> | <b>43.1</b> | <b>3</b>              |

**Figure 6: City of Waterloo Population Age Distribution, 2017-2021**



Source: U.S. Census Bureau, American Community Survey 2017-2021.

## External Population Growth (Jefferson County)

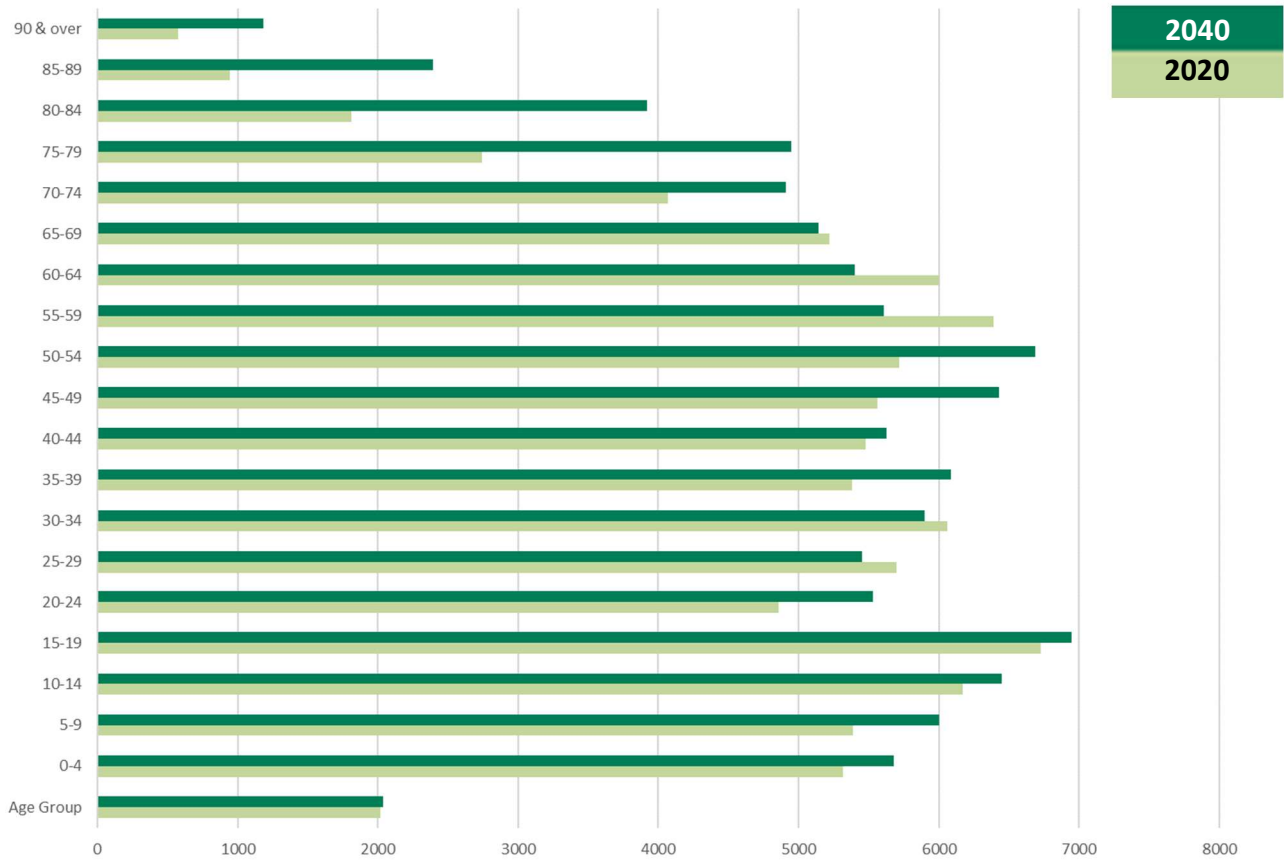
The market for senior housing will certainly extend beyond the City’s borders. As one of the premiere small communities within Jefferson County, it is very likely that seniors across Jefferson County, as well as parts of Dodge and Dane County, could be attracted to Waterloo if the right type of housing and amenities are available. Examining age cohort projections for Jefferson County (Table 7 and Figure 7) shows that significant growth is projected between 2020 and 2040 in the 65+ age cohorts. A total increase of 7,130 persons is expected within the 65+ age cohorts and represents a significant aging of Jefferson County’s population. Other neighboring counties have similar growth projections.

**Table 7: Jefferson County Population and Age Distribution Projections, 2020-2040**

| Age Group | 2020  | 2025  | 2030  | 2035  | 2040  | Difference<br>2020-2040 | % Change<br>2020-2040 |
|-----------|-------|-------|-------|-------|-------|-------------------------|-----------------------|
| 0-4       | 5,320 | 5,510 | 5,680 | 5,690 | 5,680 | 360                     | 6.8%                  |
| 5-9       | 5,390 | 5,790 | 5,970 | 6,050 | 6,000 | 610                     | 11.3%                 |
| 10-14     | 6,170 | 5,960 | 6,380 | 6,450 | 6,450 | 280                     | 4.5%                  |
| 15-19     | 6,730 | 6,850 | 6,600 | 6,950 | 6,950 | 220                     | 3.3%                  |
| 20-24     | 4,860 | 5,450 | 5,550 | 5,270 | 5,530 | 670                     | 13.8%                 |
| 25-29     | 5,700 | 5,130 | 5,740 | 5,770 | 5,450 | - 250                   | -4.4%                 |
| 30-34     | 6,060 | 5,980 | 5,370 | 5,920 | 5,900 | - 160                   | -2.6%                 |
| 35-39     | 5,380 | 6,420 | 6,310 | 5,570 | 6,090 | 710                     | 13.2%                 |
| 40-44     | 5,480 | 5,570 | 6,640 | 6,420 | 5,630 | 150                     | 2.7%                  |
| 45-49     | 5,560 | 5,610 | 5,700 | 6,690 | 6,430 | 870                     | 15.6%                 |
| 50-54     | 5,720 | 5,610 | 5,670 | 5,700 | 6,690 | 970                     | 17.0%                 |
| 55-59     | 6,390 | 5,660 | 5,560 | 5,570 | 5,610 | - 780                   | -12.2%                |
| 60-64     | 6,000 | 6,230 | 5,530 | 5,390 | 5,400 | - 600                   | -10.0%                |
| 65-69     | 5,220 | 5,720 | 5,970 | 5,260 | 5,140 | - 80                    | -1.5%                 |
| 70-74     | 4,070 | 4,830 | 5,320 | 5,540 | 4,910 | 840                     | 20.6%                 |
| 75-79     | 2,740 | 3,570 | 4,270 | 4,710 | 4,950 | 2,210                   | 80.7%                 |
| 80-84     | 1,810 | 2,200 | 2,890 | 3,500 | 3,920 | 2,110                   | 116.6%                |
| 85-89     | 945   | 1,170 | 1,440 | 1,930 | 2,390 | 1,445                   | 152.9%                |
| 90 & over | 575   | 600   | 715   | 885   | 1,180 | 605                     | 105.2%                |

Source: WDOA, vintage 2013 projections

**Figure 7: Jefferson County Population and Age Distribution Projections, 2020-2040**



Source: WDOA, vintage 2013 County Age Projections.

In reviewing other sources of information on the senior populations for Jefferson County, a review of the County’s Aging & Disability Resource Center’s (ADRC) most recent *3-year Aging Plan* (adopted in 2021 for the FY2022-2024 time period) was conducted. This plan outlines various issues and concerns that are/will be faced with respect to the County’s aging population and shows projected increases in senior-age cohorts (Table 8). Several excerpts of the plan provide a good overview of the aging issues present within Jefferson County:

*“Jefferson County is home to an estimated 84,701 residents. According to the US Census, American Community Survey, 2015 – 2019 estimates, the median age in Jefferson County is 41.1 years. The table below estimates that the aging population of 60 and over represents 23% of our county population. Of this 23%, the Aging Unit is serving approximately 5% (1049) annually.”*

*“The population in Jefferson County is expected to increase over the next couple of decades for all ages of the population but the expectation of our very oldest 85+ is expected to double in population by 2040.”*

**Table 8: Jefferson County Population and Age Projections, 2020-2040.**

| Jefferson County | 2015   | 2020   | 2025   | 2030   | 2035   | 2040    |
|------------------|--------|--------|--------|--------|--------|---------|
| All Ages         | 85,455 | 90,120 | 93,860 | 97,305 | 99,265 | 100,300 |
| Aged 60 +        | 18,185 | 21,360 | 24,320 | 26,135 | 27,215 | 27,890  |
| Aged 65+         | 12,735 | 15,360 | 18,090 | 20,605 | 21,825 | 22,490  |
| Aged 85+         | 1,475  | 1,520  | 1,770  | 2,155  | 2,815  | 3,570   |

Source: Jefferson County ADRC, 2021.

### External Population Growth (Market Area)

Looking beyond Jefferson County’s boundaries at the defined Market Area, ESRI’s Business Analyst software was used to identify the number of targeted individuals (65+ years of age) across each Drive Time Segment. This information is provided for the 2022 (current), and 2027 (projected) time periods and are displayed in Table 9 as well as being illustrated on Map 3 and Map 4. Detailed information is contained in Appendix B.

Conducting this analysis makes it apparent that a significant potential market exists for senior housing which the City of Waterloo could tap into. While the projected 65+ populations are relatively small within/close to Waterloo (0-10 minute drive time = +211 persons), the maximum extent of the Market Area (0-30-minute drive time) shows an expected increase of over 5,971 persons 65 and older by 2027. It is worth noting that within each drive time segment, the percentage increases of 65+ individuals are relatively consistent, ranging from 13.8% to 15.8%.

**Table 9: Market Area Populations 65+ Years of Age, 2022 & 2027 by Drive Time Segment**

| Drive Time               | 65+ Population |               |               |                      |                    |
|--------------------------|----------------|---------------|---------------|----------------------|--------------------|
|                          | 2010           | 2022          | 2027          | Difference 2022-2027 | % Change 2022-2027 |
| 0-10 Min.                | 967            | 1,335         | 1,546         | 211                  | 15.8%              |
| 10-15 Min.               | 1,048          | 1,487         | 1,718         | 231                  | 15.5%              |
| 15-20 Min.               | 4,572          | 6,916         | 7,981         | 1,065                | 15.4%              |
| 20-25 Min.               | 8,444          | 12,550        | 14,286        | 1,736                | 13.8%              |
| 25-30 Min.               | 12,062         | 19,022        | 21,750        | 2,728                | 14.3%              |
| <b>Total (0-30 Min.)</b> | <b>27,093</b>  | <b>41,310</b> | <b>47,281</b> | <b>5,971</b>         | <b>14.5%</b>       |

Source: ESRI Business Analyst, 2022.

While the total potential demand within the Market Area is roughly 6,000 individuals over 5 years, it is unlikely that each of these individuals will be living alone. Therefore, to be conservative, assuming two individuals inhabit each senior dwelling unit, a minimum of 3,000 senior housing units will be required to accommodate the projected senior population within the Market Area by 2027.

Obviously, a majority of current residents 65+ within the 30 minute drive time market are already established in a home. With an increase of this magnitude in the external market, it is highly likely that a reasonable amount of market rate independent living and assisted living units could be occupied assuming that price and amenities are kept competitive. Assuming that even a small portion (5%) of the expected 3,000 senior housing units is captured by the City, it is not unreasonable to estimate that 150 units could be filled over the next 5 years, or about 30 units per year.

It is also interesting to consider the full impact of these age cohort shifts. According to research by the national firm CBRE in 2015, the average age of a new assisted living resident was 84 years old, a figure which is likely similar today. Consider that in 2023, the leading edge of Baby Boomers (1946-1964) is now 77 years old. Therefore it's reasonable to expect that in about five years, massive amounts of baby-boomers will need senior housing facilities.

### Age 50+ Market

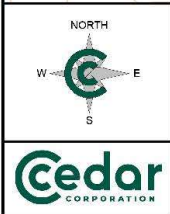
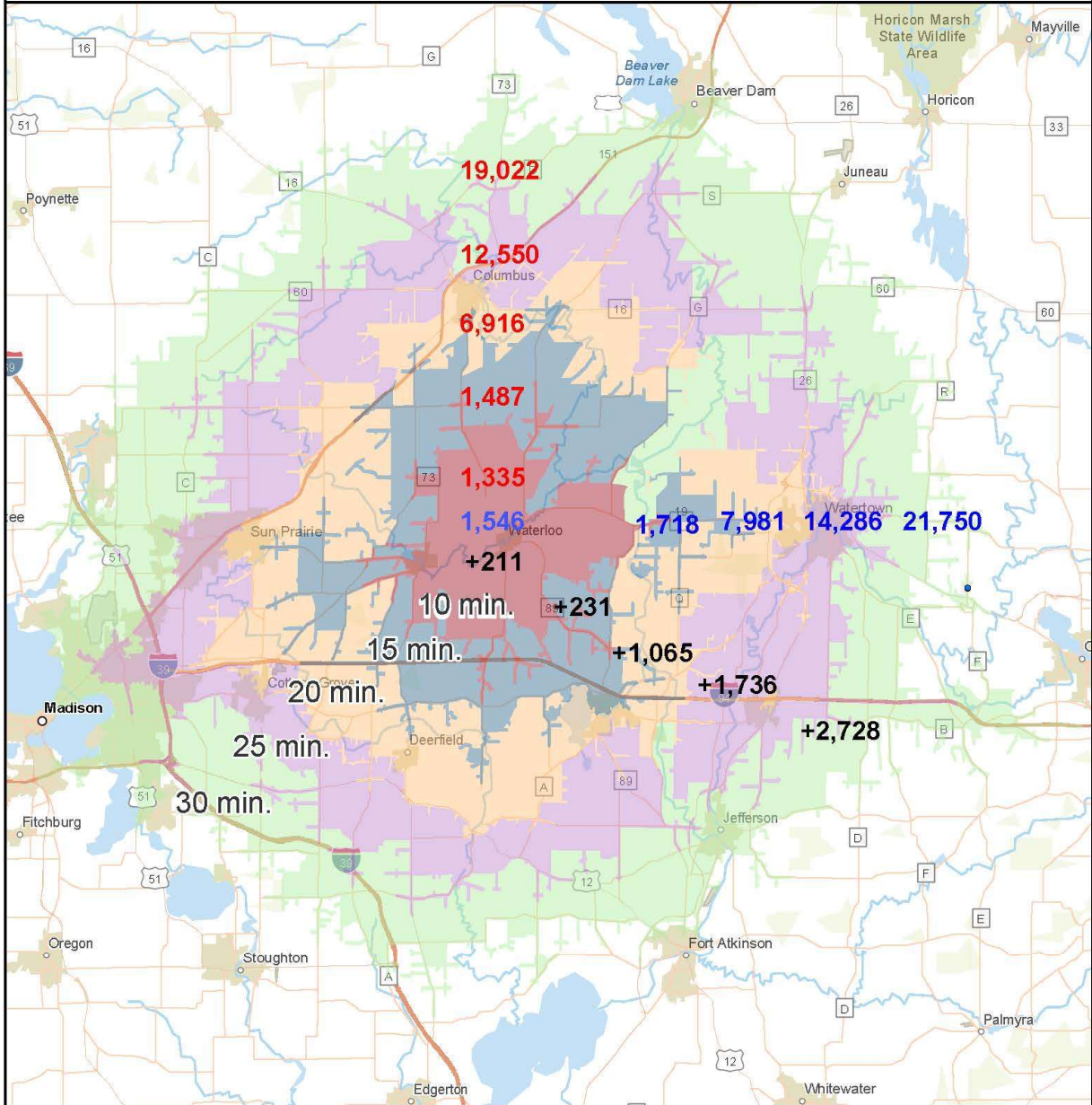
While this report focuses mainly on the housing demands for the age 65+ market segment over the next five years, there is additional value in examining the entire 50+ population as the City may benefit from thinking more long term with respect to senior housing needs. Those in their 50's will start having needs for senior living facilities (including 55+ communities) within the next 5 to 15 years.

While a significant number of 50-64 year olds exist within both the County and the Market Area, this age group is expected to decline within both geographies. The Jefferson County age projections (Table 7) shows a 6.2% decline and the total 30-minute drive-time Market Area population shows a decrease of 6.0% (-3,000 persons) over the 5-year period from 2022 to 2027. The reductions in the 50-64 age group may have impacts on the demands and needs for this population segment moving beyond 2027.

Detailed demographic information for the 50+ age group (2010, 2022, and 2027) were prepared using ESRI's Business Analyst software. This data correlates to the same drive-time radii used for the 65+ age cohort and can be found in Appendix B.



## Map 4 - 2022 & 2027 Populations 65+ Years of Age by Market Area Drive Time Segment



**City of Waterloo**  
Jefferson County, WI

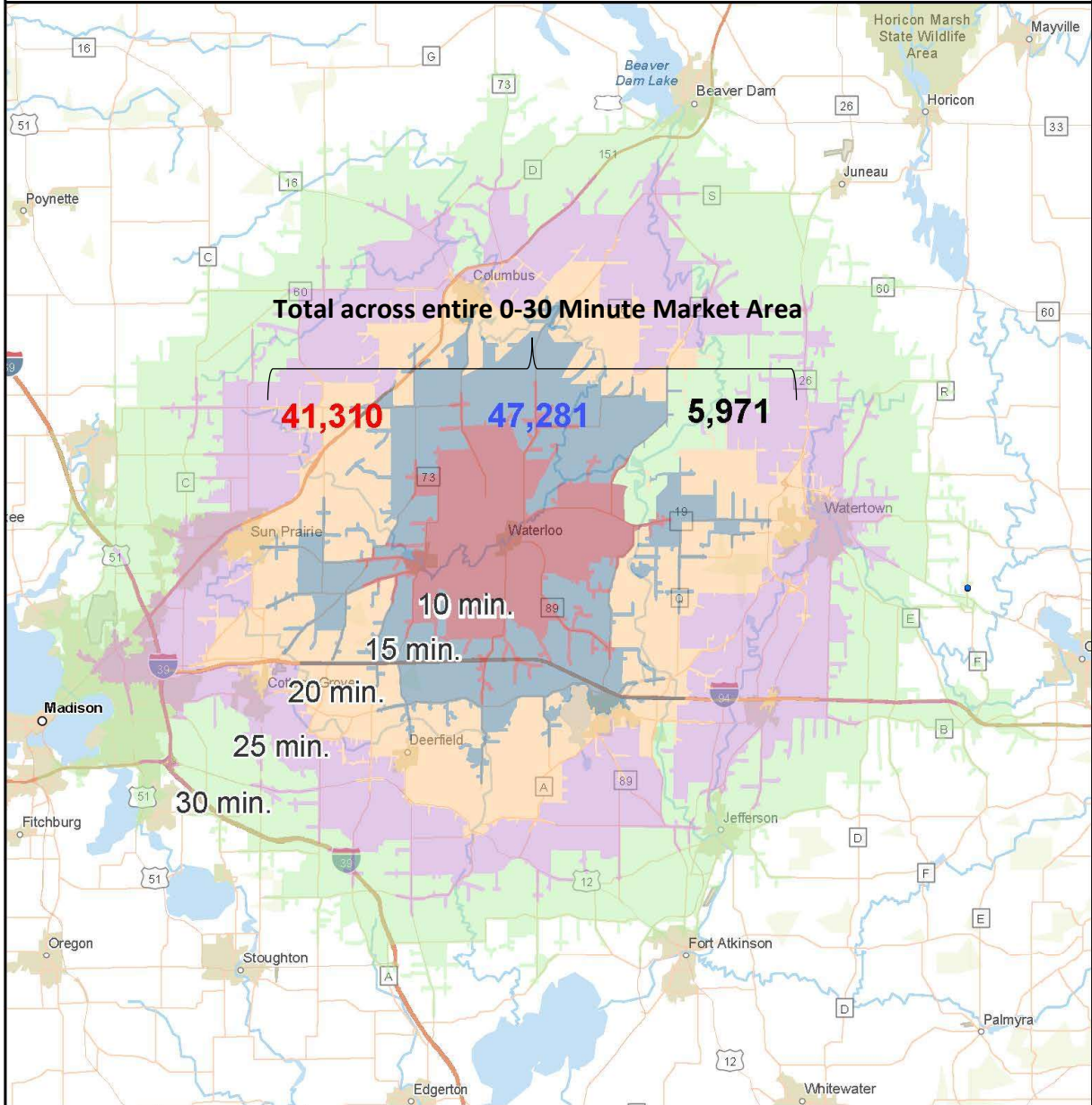
0 5 10 Miles

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**2022 Population 65+**  
**2027 Population 65+**  
**Increase 2022-2027**

Map Updated: May 2, 2023

## Map 5 - 2022 & 2027 Population 65+ Years of Age for Entire Market Area (0-30 Min. Drive Time)



|  |  |  |  |
|--|--|--|--|
|  |  | <p><b>City of Waterloo</b><br/>Jefferson County, WI</p>  | <p><b>2022 Population 65+</b><br/><b>2027 Population 65+</b><br/><b>Increase 2022-2027</b></p> |
|  |  | <small>THE INFORMATION ON THIS MAP IS FROM A COMPLETE CENSUS AND/OR OTHER SOURCE OF POPULATION INFORMATION. CEDAR CORPORATION ASSUMES NO LIABILITY FOR ANY ERRORS OR OMISSIONS CONTAINED ON THIS MAP. DATA FROM THIS SOURCE IS PROVIDED FOR INFORMATIONAL PURPOSES ONLY AND IS NOT TO BE USED FOR ANY OTHER PURPOSE.</small> | <small>Map Updated: May 2, 2023</small>  |

## SENIOR LIVING COSTS & AFFORDABILITY

### ASSISTED LIVING COSTS

Senior housing costs, particularly for assisted living and on-site care can be quite significant. According to the 2019 report by the Legislative Reference Bureau entitled *Retirement Security in Wisconsin*, the state-wide median cost of an assisted living facility is \$51,600 per year (\$4,300/mo.). The median nursing home care cost for one year in 2019 was \$100,010 (\$8,344/month) for a semi-private room, or \$112,146 (\$9,345/mo.) for a private room.

More regionally, the monthly costs for assisted living average between \$4,100 and \$4,998 per month according to data supplied by seniorly.com. These monthly costs appear to be in line with prices quoted for several of the facilities that exist within the City of Waterloo.

### AFFORDABILITY

In general, the affordability of senior housing is a challenge as older adults with limited financial resources face a much lower chance of successfully aging in place. Many middle-income earners who can't afford senior housing or support services make too much or have too many assets to qualify for government assistance. And even well-resourced seniors face financial hurdles and are paying more than 30 percent of their income for housing on top of tax, insurance, and utility payments. Many older homes will also require expensive updates to make them more accessible, such as retrofitting wider hallways and doors, ramps, and first-floor bathrooms.

Specific data for incomes of those 65 years and older are not available from the U.S. Census, but statistics at the state level indicate that poverty rates increase as people age. According to the 2019 report by the Legislative Reference Bureau entitled *Retirement Security in Wisconsin*, 9.5 percent of older Wisconsinites were living in poverty in 2017. In Wisconsin, the poverty rate nearly doubles from the age of 60 to the ages of 85+. Poverty has been associated with poor health outcomes including increased risk of disability, homelessness and physical and cognitive decline.

Many older adults subsist on limited incomes and modest savings that restrict their ability to afford basic medical care much less housing. Furthermore, 63% of adults ages 65 and older have at least two chronic conditions, leading to increased out-of-pocket expenses.

Another contributor to the growing elder poverty rate is that most retirement income does not grow at the rate of inflation. Social Security beneficiaries receive annual cost-of-living adjustments, but the increases do not reflect the inflation experienced by all retirees because they are based upon the inflation experienced by working Americans, who have different spending patterns.

## SENIOR LIVING DEVELOPMENT COSTS

Senior living facility development and construction costs can be significant as compared to the costs for traditional residential units. Based on CBRE national level data from 2022, average cost components for senior housing development are as follows:

- Site Acquisition Costs: \$32.80 / sq. ft. (8.2% of development costs)
- Average Site Size: 6.78 acres
- Construction Costs: \$333.00/sq. ft. (70.2% of development costs)
- Furniture, Fixtures & Equipment Costs: \$9.75/sq. ft. (3.0% of development costs).
- Total Cost Per Unit: \$317,400 (an increase of 12.8% since 2020)

The CBRE data also documented the top senior housing market “headwinds” (or barriers to development) which include, in order: Staffing availability, inflation, interest rates, and supply/development. Given these costs and challenges, it may be necessary for communities to offer incentives and subsidies of various types in order to assist in the development of new senior living projects.



## 4 SENIOR HOUSING OPPORTUNITIES

### SUMMARY

From a land use perspective, the City of Waterloo has ample opportunities to support new development which could incorporate a variety of senior housing options and styles as listed previously. Higher density developments can also help to breathe new life into downtowns across the country. Increases in density and intensity can also be an asset to a community in a variety of ways including the continued revitalization of its downtown and the redevelopment of key commercial corridors leading into the City.

### POTENTIAL SITES

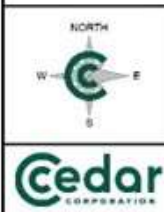
An evaluation of potential new senior housing sites was conducted based on information and insights provided by the City, as well as current landownership. Ideally, new senior housing sites would be in close proximity (a walkable distance) to a variety of amenities and services such as parks, trails, a grocery store, medical offices, coffee shop, library, and other retail and service providers.

A total of nine (9) sites were identified across the City which may have high potential for accommodating new senior housing; and, while some may not be ideal in terms of their proximity to amenities and services, many do have access to the City's wide array of natural features and trails. These sites are listed and described on the following pages and are illustrated on Map 6. The boundaries of the City's existing Tax Incremental Districts (TIDs) are also contained on this map for reference.





## Map 6 - City of Waterloo, Potential Senior Housing Sites



**City of Waterloo**  
Jefferson County, WI

0 5 10 Miles

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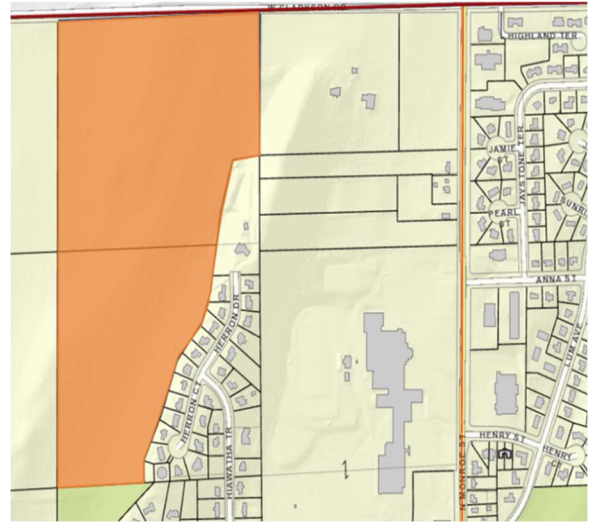
*See keyed descriptions in report for site information*

Map updated May 1, 2023

4. **MV21 LLC Property – 234 Goehl Road:** This 1.17 acre property has great potential to accommodate new senior family housing as it lies adjacent to two existing facilities. A similar sized apartment-style building mirroring those to the west could be accommodated on the site. Limited municipal incentives for development may be available as this property is included in TID #5.



5. **TIF #5 Properties – West Clarkson Road:** Approximately 63 acres of undeveloped agricultural land located in the northwestern portion of the City was recently brought into a new Tax Increment District (#5). These properties offer many options for the creation of new senior housing within an integrated residential neighborhood. Any of the aforementioned types of assisted living, or the subsequently discussed alternative senior housing styles could be accommodated on these properties within the context of a master plan. Limited municipal incentives for development may be available as this property is included in TID #5.



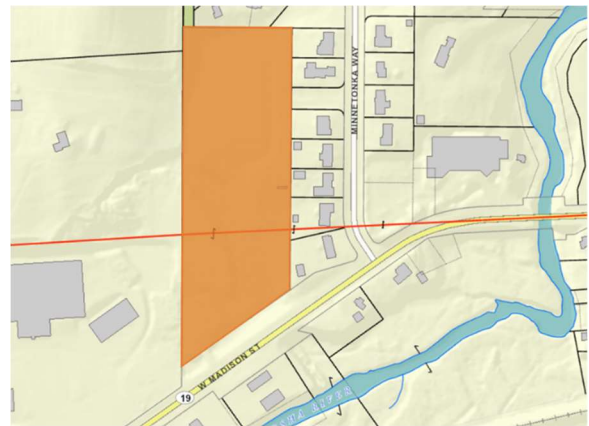
6. **McKay Nursery Holding Property – 1001 W. Madison Street:** This 26 acre property is located on the City's western border, along the north side of WIS 19. While not currently on the market, the property could be suitable for senior living facilities or a 55+ community (cottage style development?) which includes easy access to riverfront greenspace. The site is also close to the Dr. J.S. Garman Nature Preserve and about one mile west of downtown. This property also lies within the newly created TID #5.



7. **Former Gas Station – 688 W. Madison Street:** This redevelopment-focused property consists of 0.79- acres located between WIS 19 and the Mauneshia River. It is currently an abandoned gas station but has the potential to house a small, multi-story building or perhaps a small pocket neighborhood style development. While not noted on the WDNR’s remediation website, an environmental investigation will likely need to be done, and any soil contamination, if present, will need to be dealt with prior to redevelopment. This property is located within TID #5.



8. **Morrison Field – 127 Minnetonka Way:** This City owned property consists of 6.86 acres with a portion of it being used as a soccer field. While some site improvement plans have been made, the site’s limited access, lack of parking and other amenities does not make it an ideal park site. Re-locating the soccer field and developing a master plan which integrates new senior housing along with some greenspace/park space is an option the City may wish to pursue. This property is located within TID #5.

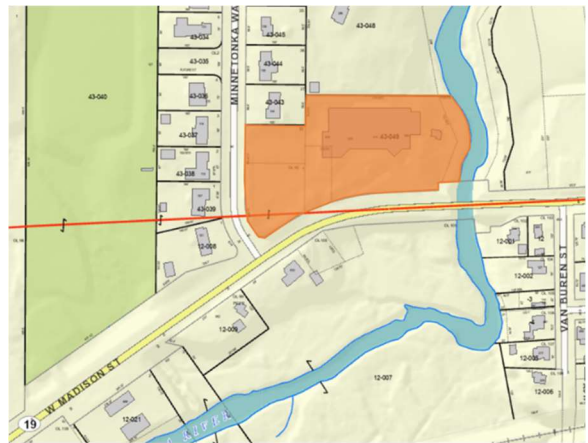


9. **Riverwalk of Waterloo LLC (former Perry Printing site) – 477 W. Madison Street:** This site currently houses the Riverwalk senior living facility but has plenty of room for expansion on either side of the existing structure. This site is adjacent to downtown and very walkable. This property lies within TID #2.





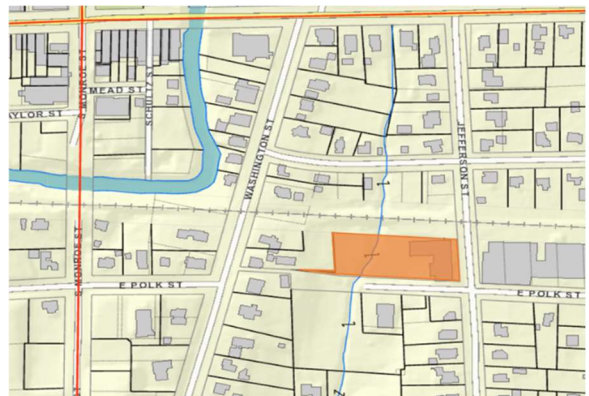
10. **Waterloo Technology Center– 565 W. Madison Street:** This 3.1 acre property has an existing, former corporate office building and is available for lease; and, while the property itself is not on the market, it may have many desirable qualities as an adaptive re-use project for senior housing. It’s 42,000+ square foot size, parking facilities and location along the Maunasha River, along an easy access stretch of WIS 19 may make this a desirable location. Feasibility studies would need to be conducted regarding the ability to convert this structure into housing. This property is not located within a TID.



11. **City Owned Property – 333 Portland Road:** fronting acre site in the northeast part of Waterloo. Situated at the western end of Industrial Drive, this area offers some redevelopment opportunities for retail along the frontage of WIS 19 and the potential for approximately 5 acres of senior housing development fronting the Maunasha River, across from Fireman’s Park. This property lies within the boundaries of TID #3.



12. **Waterloo Antiques Mall - 255 Jefferson Street:** This 0.93 acre parcel is located a few blocks southeast of downtown and houses an existing 24,000 square foot historic brick building. The building is already ADA accessible, has newer windows, and would potentially be eligible for historic tax credits if converted into senior living apartments. Adequate space exists to accommodate parking and greenspace, and the building could potentially incorporate retail and/or services which cater to senior needs. This property is not located within a TID.



## ALTERNATIVE HOUSING STYLES

In addition to vacant land sites and the potential rehabilitation/re-use of existing buildings within the community, there may be other options for the City to consider in terms of new development which better provides for residents in their senior years.

### AGE 55+ COMMUNITIES

A 55+ community is an established active adult living area that has at least one resident living on each property over the age of 55. These retirement communities are designed with a target market over the age of 55 in mind, from amenities to location. Everything from floor plans and expected home maintenance to community events and resources cater to older homeowners. 55+ communities can incorporate any or all of the housing types described in this section. There are a number of 55+ communities within the region, such as Highland Village in Watertown as well as a fairly new development, Whistling Ridge in nearby Marshall.



### DUPLEX/ATTACHED SINGLE-FAMILY CONDOS

Townhome/condo units are very similar to standard market-rate attached housing and will typically offer all of the same features and amenities found in a non-age restricted housing development. The distinguishing characteristics of senior-friendly duplex or attached single-family units are universal design elements that anticipate increased longevity, aging in place, and increasing needs for home care and physical accommodations. Universal design elements include step-free entryways; wide doorways and hallways; lever handles for all doors (instead of knobs); first floor bedroom/bath; and non-slip floors, steps, and baths. All senior housing units will contain some or all of the above universal design elements. Duplex/attached single family units are most often found in senior communities of choice such as lifestyle communities, mixed-facility campuses, and RCAC's.

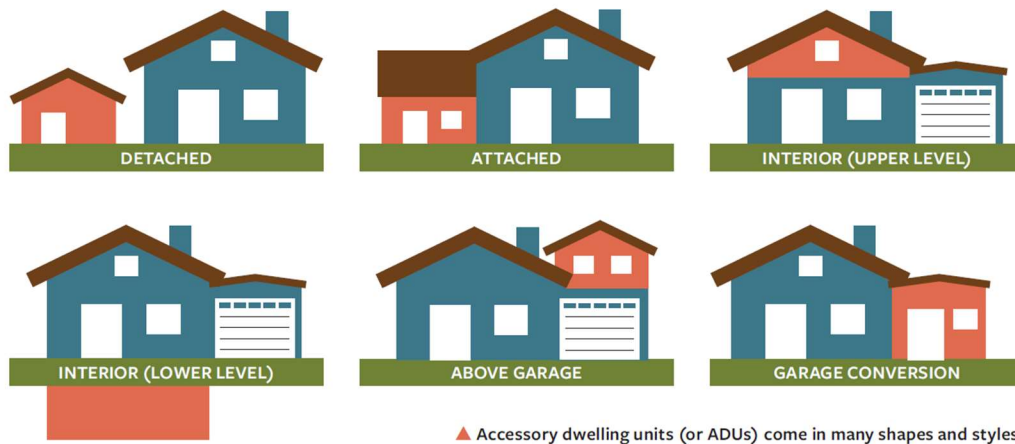


## ACCESSORY DWELLING UNITS (ADUs)

As Waterloo residents continue to age, there often comes a time when they might not want to maintain a separate home but do not wish to live in a retirement or elderly care home. An alternative would be to allow small, secondary living quarters on one residential parcel. Known as ADUs, or sometimes as “granny flats,” these types of units allow the elderly to maintain their own independent living quarters for sleeping and washing while being able to easily interact with their family for meals and socializing in the principal residence. They can provide an affordable rental option for students or young couples.

The City of Waterloo does not have any provisions in its current Zoning Ordinance which allows for the construction of Accessory Dwelling Units. A new section of code would need to be developed and approved in order to facilitate the development of ADUs within the City.

**Figure 8: Accessory Dwelling Unit (ADU) Examples**



## COTTAGE STYLE/POCKET NEIGHBORHOODS

Cottage Style (or Cottage Court) and Pocket Neighborhood styles of development are suitable for new development, or as a redevelopment option on small parcels of land (1+ acre). This style consists of small (600-1,000 sq. ft.) cottage-style homes that prioritize function in a limited living space. While many cottages are one-and-a-half or two-story properties, the overall square footage tends to be lower.



Cottage units house one or more seniors in a non- apartment, non-institutional environment, which is appealing to seniors with limited financial means. Cottages are often indistinguishable from a small single family house or duplex unit from the exterior. In a cottage housing development, groups or "clusters" of individual housing units are together around communal features, typically open space and a community building. Because cottage housing offers a communal feature, residents share in a greater sense of community while partaking in the activities or amenities provided. Specific to senior housing, cottage development allows community amenities to be concentrated in one, communal area such as a community center. This type of development has a lower impact on communities and allows seniors easier access to aid.



According to [www.pocket-neighborhoods.net](http://www.pocket-neighborhoods.net) the shared outdoor space at the center of a cluster of homes is a key element of a pocket neighborhood. Residents surrounding this common space take part in its care and oversight, thereby enhancing a felt and actual sense of security and identity. Privacy is also an essential ingredient that allows residents to have a positive experience of community. In a classic cottage courtyard community, there are several increasingly private 'layers of personal space' between the shared commons and the front door.



## APARTMENTS

Apartments are the dominant market-rate unit type for senior housing, spanning nearly the entire range of senior housing models. Apartments can be luxuriously appointed units in a lifestyle community, modestly sized units for independent seniors of limited means, or small units with less extensive cooking facilities in assisted living communities where meals are served in communal settings. The particular design and appointment of the apartments will depend on the market segmentation and local conditions of the senior housing facility, but any apartment unit will have a private lockable entry and cooking facilities of some nature. It should be noted that the apartment model can also accommodate a variety of mixed uses (i.e. first floor commercial, etc.).

## IN-HOME SENIOR HOUSING UNITS

This type of housing refers to seniors who still live in their own home outside of a senior housing facility but require outside services. This living arrangement is important to acknowledge as a large percentage of seniors will remain in their homes as long as possible either by choice, or due to financial considerations. Other more non-traditional senior housing models exist that may gain more acceptance as seniors seek more cost-effective or socially desirable living arrangements. It is possible that a broader portion of the population will consider these solutions as realistic options.

## HOUSING COOPERATIVES

Cooperatives are a form of ownership where the senior housing facility is owned and controlled by the residents themselves. These facilities are often most akin to independent living through congregate care facilities on the senior housing continuum in the building design and services that are offered. The key difference between a senior cooperative and other ownership structures is that cooperatives can appeal to seniors who would be otherwise resistant to moving out of their single-family homes because the cooperative passes the financial benefit of ownership to the senior owners. In this manner, a cooperative ownership structure removes one of the principal obstacles that prevent seniors from moving to a senior housing facility.

## HOME SHARING

Home Sharing is an arrangement where a senior may share their home with another senior or non-senior in exchange for rent or services, or where a group of un-related seniors co-habitate in a single dwelling unit. There is no formal organization that is in charge of a home sharing arrangement; all services are arranged for by the residents themselves.

## “VISITABILITY”

As people age, their ability to move within their own home, or even stay within their own community, can become increasingly difficult. For a number of elderly and mobility-impaired residents, the simple presence of a single stair to enter a home can cause a great deal of difficulty. In other cases, elderly people who desire to downsize may not have appropriate housing styles available in their community to accommodate their needs.

According to Green Bay-based Options for Independent Living, “visitability” applies to the construction of new single-family homes to make them “visitable” by people with physical or mobility disabilities. Typically, visitable homes have:

- One entrance with no steps.
- A minimum 32-inch clear passage through all the main floor doors and hallways.
- A useable bathroom on the main floor.

Although these improvements do not allow full accessibility, they do allow (at a minimum) the elderly, and people with mobility limitations, the ability to visit a home or remain living in their home for a longer period of time.

## “AGING IN PLACE”

For many, aging in place is about remaining in the home they have lived in and, in some cases, owned for decades, . For others, it means relocating to a smaller apartment or residence within their longtime community or neighborhood. Yet each approach requires different supports, structures, and policy prescriptions.

From a community perspective, promoting “aging in place” means having a diverse set of housing types and styles which can offer the opportunity to move out of a larger home and into a smaller house, apartment or assisted living facility that is more suited to senior needs. Recent housing market trends are showing that people are living in their homes longer, mostly due to price and the overall availability of different housing options.

While 1,800 square foot ranch homes are suited well for families, when the majority of the housing stock is comprised of such units, it makes it very challenging for a resident to stay within their own community. The City will need to embrace the ‘aging in place’ concept and can help support it by ensuring that a diverse set of housing types are built in the future and that its existing housing stock is well-maintained, energy-efficient, and has the ability to be modified to allow for a lower income older population. In addition, the community also needs to consider the larger place - does the location of the home have the amenities and transportation alternatives and walkability and opportunities to engage in the community that a senior might want or need?

## 5 MAJOR FINDINGS & RECOMMENDATIONS

### SUMMARY

Based on the information cited, it appears that a substantial potential market for senior housing will exist within the City and surrounding Market Area over the next 5 years with perhaps 150 units being needed. However; it is difficult to quantify the exact demand as it relates to specific sub-segments of the senior population as medical service needs will vary greatly.

In addition, one must understand that seniors are not a ‘market unto themselves’, as portions of the senior population have different desires or needs for housing. For example, the ‘Young Senior’ cohort likely resembles the ‘Non- Senior’ portion of the population more than it does the ‘Middle Seniors’. ‘Middle Seniors’ and ‘Old Seniors’ also share many characteristics, but the ‘Old Seniors’ may have a set of distinct concerns with respect to their housing needs. While this may further muddy the waters regarding the targeting sub-sectors of the Senior market, it is generally affirmed by most that aging in place is the preferred mode of living for seniors regardless of where they fall on the age spectrum. Data from the American Community Survey (ACS) suggests that seniors make their moves mainly out of necessity and not by choice.

Also, rental housing is a difficult sell to most seniors as evidenced with the occupancy rate at Highland House (50%). Many own their homes outright, meaning they only pay taxes and utilities to continue their occupancy. Also, they tend to have lower renter percentages and wish to age in place. However, disability information suggests that living alone is not a tenable strategy for all seniors, and renting starts to become more common among middle seniors, reaching a maximum in the oldest seniors group. Since rental housing is generally less expensive than buying a home, it can fill part of that need for the senior population given the right product type.

### KEY RECOMMENDATIONS

Based on the information and analysis in this report, several key recommendations are provided to the City in order to further pursue and/or accommodate future senior housing opportunities for its current and future residents:

1. Incorporate the study’s findings into the next update of the City’s comprehensive plan in a manner which also better addresses the concepts of “livability” and creating an age-friendly “livable community”. Additional information regarding “livable communities” from AARP is contained in Appendix B.



2. Amend the City’s comprehensive plan to more clearly identify areas targeted (reserved) for future senior housing as noted on Map 6. The sites could accommodate the development of both market rate independent living facilities as well as assisted living facilities over the next 5 years. As noted earlier in the report, it is expected that about 150 units could be filled over the next 5 years based on internal and external growth of the 65+ community within the Market Area.
3. Spend additional time reviewing examples and determining preferences for the types and varieties of senior housing models as it pertains to market rate and independent living options. For example, creating housing opportunities that closely resemble seniors’ former homes can make renting a more attractive option to households looking for alternatives. Ranch-style “cottage courts”, accessory dwelling units, and “pocket neighborhoods” could be important parts of this equation rather than just relying on private sector activity for larger independent living/senior apartments.
4. Incentives to support the development of new senior housing should be considered, with sites located within TID #2 or TID #5 being eligible for assistance in the form of infrastructure extensions, or “pay-go” direct assistance based on the potential increment generated.
5. Market the City of Waterloo as a lower-cost retirement destination which is close to many larger metropolitan areas. This could be achieved by placing more information on the City’s website with respect to senior living lifestyles and opportunities, as well as providing information about specific site opportunities to the development community.
6. Review, update, and amend current zoning regulations and modify as required to facilitate development of affordable senior living opportunities. This could include addressing several areas such as:
  - a. Relaxing Single Family only zoning classifications
  - b. Reducing lot sizes & widths to make new construction more affordable.
  - c. Reductions in parking requirements
  - d. Creation of Accessory Dwelling Unit (ADU) provisions
  - e. Creation of Cottage Style/Pocket Neighborhood Provisions
  - f. Adaptive Re-Use of Abandoned Commercial/Industrial Structures
  - g. Opportunities for retail/housing Mixed Use projects

7. Focus on “Quality of Life” improvements throughout the community as they can benefit all existing and future residents, however; give special consideration to how (and where) such improvements may specifically benefit senior populations. New trails with new connections that link existing and future recreational sites and necessary day-to-day services will be important for the City’s aging population. Furthermore, the City should be sure to incorporate accommodations for electric scooters and electric personal assistive mobility devices when reviewing trails, parks and other infrastructure.
8. Target new businesses and services to locate in areas which can serve a growing senior population.
9. Continually monitor internal and external senior housing activities and issues and consider a formal review and update this study after a 3-year period (2026/2027).
10. Consult and communicate regularly with the Jefferson County ADRC with respect to future planning tasks and activities. Also identify and collaborate with other agencies, associations and entities to better address current and future “aging in place” issues.



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## List of Appendices

The following appendices are referenced in this report and are included in this section, as follows:

- Appendix A: Senior Living Facility Inventory
- Appendix B: Esri Business Analyst Report – Age 50+ Profile
- Appendix C: AARP’s “The 8 Domains of Livability”



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## Appendix A: Senior Living Facility Inventory

### Listing of Senior Living Facilities in Market Area.

| FACILITY NAME                         | COUNTY    | CITY        | FACILITY TYPE                | CAPACITY | DRIVE TIME DISTANCE |
|---------------------------------------|-----------|-------------|------------------------------|----------|---------------------|
| SIENNA CREST MARSHALL                 | DANE      | Marshall    | COMM. BASED RESIDENTIAL FACS | 20       | 0 - 10 minutes      |
| HIGHLAND HOUSE                        | JEFFERSON | Waterloo    | RESIDENT CARE APT COMPLEXES  | 20       | 0 - 10 minutes      |
| VICTORY VISION COMMUNITY LIVING NORTH | JEFFERSON | Waterloo    | COMM. BASED RESIDENTIAL FACS | 6        | 0 - 10 minutes      |
| VICTORY VISION COMMUNITY LIVING EAST  | JEFFERSON | Waterloo    | COMM. BASED RESIDENTIAL FACS | 6        | 0 - 10 minutes      |
| HIGHLAND HOUSE                        | JEFFERSON | Waterloo    | RESIDENT CARE APT COMPLEXES  | 20       | 0 - 10 minutes      |
| RIVERWALK SENIOR LIVING               | JEFFERSON | Waterloo    | RESIDENT CARE APT COMPLEXES  | 29       | 0 - 10 minutes      |
| LAKE MILLS HEALTH SERVICES            | JEFFERSON | Lake Mills  | NURSING HOME (NH)            | 50       | 10 - 15 minutes     |
| VICTORIAN SPLENDOR                    | JEFFERSON | Lake Mills  | ADULT FAMILY HOME            | 4        | 10 - 15 minutes     |
| BROOK GARDENS PLACE                   | JEFFERSON | Lake Mills  | COMM. BASED RESIDENTIAL FACS | 30       | 10 - 15 minutes     |
| LILAC SPRINGS ASSISTED LIVING LLC     | JEFFERSON | Lake Mills  | COMM. BASED RESIDENTIAL FACS | 24       | 10 - 15 minutes     |
| TIMBERWOOD LODGE LAKE MILLS           | JEFFERSON | Lake Mills  | COMM. BASED RESIDENTIAL FACS | 14       | 10 - 15 minutes     |
| COLUMBUS HEALTH AND REHAB             | COLUMBIA  | Columbus    | NURSING HOME (NH)            | 50       | 15 - 20 minutes     |
| AT HOME AGAIN COLUMBUS LLC            | COLUMBIA  | Columbus    | COMM. BASED RESIDENTIAL FACS | 36       | 15 - 20 minutes     |
| LARSON HOUSE                          | COLUMBIA  | Columbus    | COMM. BASED RESIDENTIAL FACS | 36       | 15 - 20 minutes     |
| AT HOME AGAIN COLUMBUS MEMORY CARE    | COLUMBIA  | Columbus    | COMM. BASED RESIDENTIAL FACS | 12       | 15 - 20 minutes     |
| LARSON HOUSE SOUTH                    | COLUMBIA  | Columbus    | COMM. BASED RESIDENTIAL FACS | 28       | 15 - 20 minutes     |
| LONDON LODGE II                       | DANE      | Cambridge   | COMM. BASED RESIDENTIAL FACS | 8        | 15 - 20 minutes     |
| OUR HOUSE CAMBRIDGE ASSISTED CARE     | DANE      | Cambridge   | COMM. BASED RESIDENTIAL FACS | 15       | 15 - 20 minutes     |
| HOME AGAIN ASSISTED LIVING INC        | DANE      | Cambridge   | COMM. BASED RESIDENTIAL FACS | 47       | 15 - 20 minutes     |
| PLEASANT MEADOWS                      | DANE      | Deerfield   | ADULT FAMILY HOME            | 4        | 15 - 20 minutes     |
| DEERFIELD PLACE ASSISTED LIVING       | DANE      | Deerfield   | COMM. BASED RESIDENTIAL FACS | 9        | 15 - 20 minutes     |
| SUN PRAIRIE HEALTH CARE CENTER        | DANE      | Sun Prairie | NURSING HOME (NH)            | 28       | 15 - 20 minutes     |
| COLONIAL CLUB SENIOR ACTIVITY CENTER  | DANE      | Sun Prairie | ADULT DAY CARE CENTER        | 28       | 15 - 20 minutes     |
| STURDY OAKS                           | DANE      | Sun Prairie | ADULT FAMILY HOME            | 4        | 15 - 20 minutes     |

|   |           |               |                              |     |                 |
|---|-----------|---------------|------------------------------|-----|-----------------|
| NEW PERSPECTIVE SUN PRAIRIE                         | DANE      | Sun Prairie   | RESIDENT CARE APT COMPLEXES  | 50  | 15 - 20 minutes |
| NEW PERSPECTIVE SUN PRAIRIE                         | DANE      | Sun Prairie   | COMM. BASED RESIDENTIAL FACS | 50  | 15 - 20 minutes |
| OAK RIDGE LIVING SUN PRAIRIE                        | DANE      | Sun Prairie   | COMM. BASED RESIDENTIAL FACS | 8   | 15 - 20 minutes |
| TALLGRASS SENIOR LIVING                             | DANE      | Sun Prairie   | RESIDENT CARE APT COMPLEXES  | 53  | 15 - 20 minutes |
| WALK BY FAITH AFH CHRISTIANS HOME                   | DANE      | Sun Prairie   | ADULT FAMILY HOME            | 4   | 15 - 20 minutes |
| MANOR FAMILY HOME LLC (THE)                         | DODGE     | Watertown     | ADULT FAMILY HOME            | 4   | 15 - 20 minutes |
| HERITAGE ASSISTED LIVING OF WATERTOWN LLC           | DODGE     | Watertown     | COMM. BASED RESIDENTIAL FACS | 46  | 15 - 20 minutes |
| LONDON LODGE I                                      | JEFFERSON | Cambridge     | COMM. BASED RESIDENTIAL FACS | 8   | 15 - 20 minutes |
| VIEW AT JOHNSON CREEK (THE)                         | JEFFERSON | Johnson Creek | COMM. BASED RESIDENTIAL FACS | 64  | 15 - 20 minutes |
| BUCKAROOS ADULT FAMILY HOME                         | JEFFERSON | Watertown     | ADULT FAMILY HOME            | 4   | 15 - 20 minutes |
| RESCARE CASEY                                       | JEFFERSON | Watertown     | ADULT FAMILY HOME            | 4   | 15 - 20 minutes |
| MILFORD   | JEFFERSON | Watertown     | COMM. BASED RESIDENTIAL FACS | 6   | 15 - 20 minutes |
| EICKSTAEDT  | JEFFERSON | Watertown     | COMM. BASED RESIDENTIAL FACS | 6   | 15 - 20 minutes |
| AUTUMN WINDS LLC                                    | DANE      | Cambridge     | COMM. BASED RESIDENTIAL FACS | 10  | 20 - 25 minutes |
| KINDREDHEARTS OF COTTAGE GROVE                      | DANE      | Cottage Grove | COMM. BASED RESIDENTIAL FACS | 15  | 20 - 25 minutes |
| KINDREDHEARTS OF COTTAGE GROVE                      | DANE      | Cottage Grove | COMM. BASED RESIDENTIAL FACS | 15  | 20 - 25 minutes |
| DRUMLIN RESERVE                                     | DANE      | Cottage Grove | COMM. BASED RESIDENTIAL FACS | 24  | 20 - 25 minutes |
| THE BAY AT BELMONT HEALTH AND REHABILITATION CENTER | DANE      | Madison       | NURSING HOME (NH)            | 83  | 20 - 25 minutes |
| OAK PARK NURSING AND REHABILITATION CENTER          | DANE      | Madison       | NURSING HOME (NH)            | 100 | 20 - 25 minutes |
| CHAMOMILE ASSISTED LIVING LTD                       | DANE      | Madison       | COMM. BASED RESIDENTIAL FACS | 17  | 20 - 25 minutes |
| HARTLAND HOUSE                                      | DANE      | Madison       | ADULT FAMILY HOME            | 4   | 20 - 25 minutes |
| REM BRADFORD  | DANE      | Madison       | ADULT FAMILY HOME            | 4   | 20 - 25 minutes |
| CHAMOMILE ASSISTED LIVING LTD II                    | DANE      | Madison       | COMM. BASED RESIDENTIAL FACS | 24  | 20 - 25 minutes |
| OAK PARK PLACE AUTUMN LANE                          | DANE      | Madison       | COMM. BASED RESIDENTIAL FACS | 36  | 20 - 25 minutes |
| OAK PARK PLACE THE GROVE I                          | DANE      | Madison       | RESIDENT CARE APT COMPLEXES  | 32  | 20 - 25 minutes |

|                                       |      |             |                              |    |                 |
|---------------------------------------|------|-------------|------------------------------|----|-----------------|
| PROMEDICA HOSPICE MADISON             | DANE | MADISON     | HOSPICE                      | 0  | 20 - 25 minutes |
| EMERSON SENIOR LIVING                 | DANE | Madison     | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| OAK PARK PLACE AUTUMN LANE II         | DANE | Madison     | COMM. BASED RESIDENTIAL FACS | 67 | 20 - 25 minutes |
| MADISON POINTE SENIOR LIVING          | DANE | Madison     | COMM. BASED RESIDENTIAL FACS | 47 | 20 - 25 minutes |
| BLUFF POINT ADULT FAMILY HOME         | DANE | Madison     | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| MIDWEST ADULT FAMILY HOME             | DANE | Madison     | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| REM INC TWIN PINES                    | DANE | Madison     | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| REM INC BROAD CREEK                   | DANE | Madison     | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| INSPIRATIONAL CARE MADISON, LLC       | DANE | Madison     | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| COTTAGES OF MADISON ELMWOOD           | DANE | Madison     | COMM. BASED RESIDENTIAL FACS | 16 | 20 - 25 minutes |
| COTTAGES OF MADISON OAKWOOD           | DANE | Madison     | COMM. BASED RESIDENTIAL FACS | 16 | 20 - 25 minutes |
| COTTAGES OF MADISON APPLEWOOD         | DANE | Madison     | COMM. BASED RESIDENTIAL FACS | 16 | 20 - 25 minutes |
| CEDARHURST OF MADISON                 | DANE | Madison     | RESIDENT CARE APT COMPLEXES  | 60 | 20 - 25 minutes |
| ALBANS LIVING LLC                     | DANE | Madison     | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| MIDWEST ADULT FAMILY HOME LLC         | DANE | Madison     | ADULT FAMILY HOME            | 3  | 20 - 25 minutes |
| TRADITIONS OF MADISON                 | DANE | Madison     | COMM. BASED RESIDENTIAL FACS | 17 | 20 - 25 minutes |
| E HOME                                | DANE | Madison     | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| MOMENTS HOSPICE OF MADISON            | DANE | Madison     | HOSPICE                      | 0  | 20 - 25 minutes |
| LAMBAI ADULT FAMILY HOME              | DANE | Madison     | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| AGAPE ADULT FAMILY HOME LLC           | DANE | Madison     | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| CROSSROADS CARE CENTER OF SUN PRAIRIE | DANE | Sun Prairie | NURSING HOME (NH)            | 50 | 20 - 25 minutes |
| BROOKDALE SUN PRAIRIE                 | DANE | Sun Prairie | COMM. BASED RESIDENTIAL FACS | 20 | 20 - 25 minutes |
| FAITH LIVING CENTER                   | DANE | Sun Prairie | COMM. BASED RESIDENTIAL FACS | 21 | 20 - 25 minutes |
| PRAIRIE GARDENS                       | DANE | Sun Prairie | COMM. BASED RESIDENTIAL FACS | 47 | 20 - 25 minutes |
| INFINITE ABILITY INC                  | DANE | Sun Prairie | ADULT FAMILY HOME            | 4  | 20 - 25 minutes |
| HYLAND CROSSINGS                      | DANE | Sun Prairie | COMM. BASED RESIDENTIAL FACS | 28 | 20 - 25 minutes |
| HYLAND PARK                           | DANE | Sun Prairie | RESIDENT CARE APT COMPLEXES  | 49 | 20 - 25 minutes |
| TALAMORE SENIOR LIVING SUN PRAIRIE    | DANE | Sun Prairie | RESIDENT CARE APT COMPLEXES  | 26 | 20 - 25 minutes |

|                                    |           |               |                              |     |                 |
|------------------------------------|-----------|---------------|------------------------------|-----|-----------------|
| TALAMORE SENIOR LIVING SUN PRAIRIE | DANE      | Sun Prairie   | COMM. BASED RESIDENTIAL FACS | 26  | 20 - 25 minutes |
| BEDROCK HCS AT WATERTOWN           | DODGE     | Watertown     | NURSING HOME (NH)            | 112 | 20 - 25 minutes |
| MARQUARDT MEMORIAL MANOR           | DODGE     | Watertown     | NURSING HOME (NH)            | 140 | 20 - 25 minutes |
| PARK RIDGE                         | DODGE     | Watertown     | COMM. BASED RESIDENTIAL FACS | 48  | 20 - 25 minutes |
| MARQUARDT HOSPICE                  | DODGE     | WATERTOWN     | HOSPICE                      | 0   | 20 - 25 minutes |
| PARK TERRACE                       | DODGE     | Watertown     | COMM. BASED RESIDENTIAL FACS | 44  | 20 - 25 minutes |
| RESCARE STONERIDGE                 | DODGE     | Watertown     | COMM. BASED RESIDENTIAL FACS | 6   | 20 - 25 minutes |
| STONERIDGE                         | DODGE     | Watertown     | ADULT FAMILY HOME            | 4   | 20 - 25 minutes |
| FAIRFIELD                          | DODGE     | Watertown     | ADULT FAMILY HOME            | 4   | 20 - 25 minutes |
| HILLSIDE GARDENS AFH LLC           | DODGE     | Watertown     | ADULT FAMILY HOME            | 4   | 20 - 25 minutes |
| HIGHLAND HOUSE                     | DODGE     | Watertown     | COMM. BASED RESIDENTIAL FACS | 20  | 20 - 25 minutes |
| SHADY ACRES CBRF                   | JEFFERSON | Jefferson     | COMM. BASED RESIDENTIAL FACS | 4   | 20 - 25 minutes |
| SUNSET RIDGE ASSISTED LIVING       | JEFFERSON | Johnson Creek | COMM. BASED RESIDENTIAL FACS | 24  | 20 - 25 minutes |
| RESCARE 141 MICHELLE               | JEFFERSON | Johnson Creek | COMM. BASED RESIDENTIAL FACS | 6   | 20 - 25 minutes |
| DOHERTY HOME                       | JEFFERSON | Watertown     | COMM. BASED RESIDENTIAL FACS | 8   | 20 - 25 minutes |
| RIVER VIEW PLATINUM LLC            | JEFFERSON | Watertown     | RESIDENT CARE APT COMPLEXES  | 49  | 20 - 25 minutes |
| RESCARE 1633 CARLSON               | JEFFERSON | Watertown     | ADULT FAMILY HOME            | 4   | 20 - 25 minutes |
| CLOVERCREST                        | JEFFERSON | Watertown     | COMM. BASED RESIDENTIAL FACS | 6   | 20 - 25 minutes |
| WAKOKA 1                           | JEFFERSON | Watertown     | COMM. BASED RESIDENTIAL FACS | 8   | 20 - 25 minutes |
| WAKOKA 2                           | JEFFERSON | Watertown     | COMM. BASED RESIDENTIAL FACS | 8   | 20 - 25 minutes |
| MEADOWS OF FALL RIVER (THE)        | COLUMBIA  | Fall River    | RESIDENT CARE APT COMPLEXES  | 38  | 25 - 30 minutes |
| MEADOWS OF FALL RIVER CBRF (THE)   | COLUMBIA  | Fall River    | COMM. BASED RESIDENTIAL FACS | 18  | 25 - 30 minutes |
| KEYES HOUSE                        | DANE      | Deforest      | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| YOUNG HOUSE                        | DANE      | Deforest      | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| RATHEY HOUSE                       | DANE      | Deforest      | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| WEATHERLY HOUSE                    | DANE      | Deforest      | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| ROSMAN HOUSE                       | DANE      | Deforest      | COMM. BASED                  | 8   | 25 - 30 minutes |



|   |      |          |                                 |     |                 |
|---|------|----------|---------------------------------|-----|-----------------|
|   |      |          | RESIDENTIAL FACS                |     |                 |
| SOSA HOUSE  | DANE | Deforest | COMM. BASED<br>RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| LEGACY OF DEFOREST (THE)                              | DANE | Deforest | COMM. BASED<br>RESIDENTIAL FACS | 25  | 25 - 30 minutes |
| ARC MATERNAL & INFANT PROGRAM                         | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 12  | 25 - 30 minutes |
| TELLURIAN ACEWOOD HOUSE                               | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 7   | 25 - 30 minutes |
| WOMEN IN TRANSITION                                   | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 12  | 25 - 30 minutes |
| BRIGHTER LIFE LIVING                                  | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 4   | 25 - 30 minutes |
| SCHWERT AODA TREATMENT CENTER                         | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 15  | 25 - 30 minutes |
| ATTIC CORRECTIONAL TREATMENT CENTER                   | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 19  | 25 - 30 minutes |
| PORCHLIGHT  | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| NORTHPORT GROUP HOME                                  | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| ARC DAYTON ST   | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 13  | 25 - 30 minutes |
| SSM HEALTH ADULT DAY HEALTH CENTER                    | DANE | Madison  | ADULT DAY CARE CENTER           | 4   | 25 - 30 minutes |
| OAKWOOD KNOLL   | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 20  | 25 - 30 minutes |
| OAKWOOD SEASONS                                       | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 20  | 25 - 30 minutes |
| HOME OF GOOD HOPE                                     | DANE | Madison  | ADULT FAMILY HOME               | 4   | 25 - 30 minutes |
| OAKWOOD VILLAGE PRAIRIE RIDGE                         | DANE | Madison  | RESIDENT CARE APT COMPLEXES     | 206 | 25 - 30 minutes |
| OAKWOOD MEADOWS                                       | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 20  | 25 - 30 minutes |
| GRACE FAMILY HOME                                     | DANE | Madison  | ADULT FAMILY HOME               | 3   | 25 - 30 minutes |
| OAKWOOD VILLAGE EAST HEALTH AND REHABILITATION CENTER | DANE | Madison  | NURSING HOME (NH)               | 40  | 25 - 30 minutes |
| REM HARMONY   | DANE | Madison  | ADULT FAMILY HOME               | 4   | 25 - 30 minutes |
| MAHER HOME (THE)                                      | DANE | Madison  | COMM. BASED<br>RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| YASMIN'S LOVING CARE                                  | DANE | Madison  | ADULT FAMILY HOME               | 4   | 25 - 30 minutes |
| HOME OF GOOD HOPE WEBER DRIVE                         | DANE | Madison  | ADULT FAMILY HOME               | 4   | 25 - 30 minutes |
| UNIVERSE ADULT FAMILY HOME LLC                        | DANE | Madison  | ADULT FAMILY HOME               | 4   | 25 - 30 minutes |
| DIVINE HAVEN LLC                                      | DANE | Madison  | ADULT FAMILY HOME               | 3   | 25 - 30 minutes |

|   |       |            |                              |     |                 |
|---|-------|------------|------------------------------|-----|-----------------|
| CATHOLIC CHARITIES ADULT DAY CENTER         | DANE  | Madison    | ADULT DAY CARE CENTER        | 120 | 25 - 30 minutes |
| AGATE REM WISCONSIN I INC                   | DANE  | Madison    | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| UNIFIED ADULT FAMILY HOME                   | DANE  | Madison    | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| REM INC DRYDEN                              | DANE  | Madison    | ADULT FAMILY HOME            | 3   | 25 - 30 minutes |
| REM WISCONSIN INC CRESTLINE                 | DANE  | Madison    | ADULT FAMILY HOME            | 3   | 25 - 30 minutes |
| TENNYSON SENIOR LIVING COMMUNITY CBRF       | DANE  | Madison    | COMM. BASED RESIDENTIAL FACS | 60  | 25 - 30 minutes |
| TENNYSON SENIOR LIVING COMMUNITY CBRF       | DANE  | Madison    | RESIDENT CARE APT COMPLEXES  | 60  | 25 - 30 minutes |
| HAVEY RD                                    | DANE  | Madison    | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| RISE AT OAKWOOD VILLAGE PRAIRIE RIDGE (THE) | DANE  | Madison    | COMM. BASED RESIDENTIAL FACS | 40  | 25 - 30 minutes |
| GRASSLANDS AT OAKWOOD VILLAGE PRAIRIE RIDGE | DANE  | Madison    | RESIDENT CARE APT COMPLEXES  | 71  | 25 - 30 minutes |
| ABLE HOME LLC                               | DANE  | Madison    | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| HOPE REALITY, LLC                           | DANE  | Madison    | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| REM KNIGHTSBRIDGE                           | DANE  | Madison    | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| BKASCENT HOMES                              | DANE  | Madison    | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| BETHSAIDA MANASSAS                          | DANE  | Madison    | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| MCFARLAND VILLA ASSISTED LIVING             | DANE  | Mc Farland | COMM. BASED RESIDENTIAL FACS | 40  | 25 - 30 minutes |
| TELLURIAN ADULT RESIDENTIAL SERVICES        | DANE  | Monona     | COMM. BASED RESIDENTIAL FACS | 38  | 25 - 30 minutes |
| TELLURIAN TRANSITIONAL HOUSING              | DANE  | Monona     | COMM. BASED RESIDENTIAL FACS | 20  | 25 - 30 minutes |
| HUBS HOME                                   | DANE  | Monona     | RESIDENT CARE APT COMPLEXES  | 37  | 25 - 30 minutes |
| HERITAGE MONONA CBRF                        | DANE  | Monona     | COMM. BASED RESIDENTIAL FACS | 39  | 25 - 30 minutes |
| CAPITAL SQUARE                              | DANE  | Monona     | COMM. BASED RESIDENTIAL FACS | 34  | 25 - 30 minutes |
| BASCOM HALL                                 | DANE  | Monona     | COMM. BASED RESIDENTIAL FACS | 41  | 25 - 30 minutes |
| REM SYLVAN LANE                             | DANE  | Monona     | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| COUNTRY LIVING AFH                          | DANE  | Stoughton  | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| LEGACY OF DEFOREST THE                      | DANE  | De Forest  | RESIDENT CARE APT COMPLEXES  | 32  | 25 - 30 minutes |
| BEDROCK HCS AT BEAVER DAM LLC               | DODGE | Beaver Dam | NURSING HOME (NH)            | 90  | 25 - 30 minutes |
| HILLSIDE MANOR                              | DODGE | Beaver Dam | NURSING HOME (NH)            | 115 | 25 - 30 minutes |
| EAGLES WINGS                                | DODGE | Beaver Dam | COMM. BASED RESIDENTIAL FACS | 22  | 25 - 30 minutes |
| HILLSIDE HOSPICE                            | DODGE | BEAVER DAM | HOSPICE                      | 0   | 25 - 30 minutes |
| STONE TERRACE RETIREMENT LIV CTR            | DODGE | Beaver Dam | RESIDENT CARE APT COMPLEXES  | 30  | 25 - 30 minutes |



|                                      |           |               |                              |     |                 |
|--------------------------------------|-----------|---------------|------------------------------|-----|-----------------|
| ARCADIA COMMUNITIES                  | DODGE     | Beaver Dam    | COMM. BASED RESIDENTIAL FACS | 20  | 25 - 30 minutes |
| BEAVER DAM AL OPERATIONS LLC         | DODGE     | Beaver Dam    | COMM. BASED RESIDENTIAL FACS | 40  | 25 - 30 minutes |
| BEAVER DAM AL OPERATIONS LLC         | DODGE     | Beaver Dam    | RESIDENT CARE APT COMPLEXES  | 80  | 25 - 30 minutes |
| HIL LINDEN CORNER                    | JEFFERSON | Fort Atkinson | COMM. BASED RESIDENTIAL FACS | 7   | 25 - 30 minutes |
| SIENNA CREST FORT ATKINSON           | JEFFERSON | Fort Atkinson | COMM. BASED RESIDENTIAL FACS | 20  | 25 - 30 minutes |
| HAWKS RIDGE AFH                      | JEFFERSON | Fort Atkinson | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| LIGHTED PATHWAYS II                  | JEFFERSON | Fort Atkinson | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| HIL COMMONWEALTH HOME                | JEFFERSON | Fort Atkinson | COMM. BASED RESIDENTIAL FACS | 4   | 25 - 30 minutes |
| SILVER FOX                           | JEFFERSON | Fort Atkinson | ADULT FAMILY HOME            | 3   | 25 - 30 minutes |
| GRAY WOLF                            | JEFFERSON | Fort Atkinson | ADULT FAMILY HOME            | 3   | 25 - 30 minutes |
| BLUE RAVEN                           | JEFFERSON | Fort Atkinson | ADULT FAMILY HOME            | 3   | 25 - 30 minutes |
| BLACK BEAR AFH                       | JEFFERSON | Fort Atkinson | ADULT FAMILY HOME            | 3   | 25 - 30 minutes |
| GOLDEN EAGLE CBRF                    | JEFFERSON | Fort Atkinson | COMM. BASED RESIDENTIAL FACS | 5   | 25 - 30 minutes |
| FALCONS NEST CBRF                    | JEFFERSON | Fort Atkinson | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| REENA SENIOR LIVING                  | JEFFERSON | Fort Atkinson | RESIDENT CARE APT COMPLEXES  | 20  | 25 - 30 minutes |
| REENA SENIOR LIVING                  | JEFFERSON | Fort Atkinson | COMM. BASED RESIDENTIAL FACS | 20  | 25 - 30 minutes |
| BUCKAROOS ADULT FAMILY HOME LLC 2    | JEFFERSON | Helenville    | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| MY PLACE OF IXONIA I                 | JEFFERSON | Ixonia        | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| MY PLACE OF IXONIA II                | JEFFERSON | Ixonia        | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| MY PLACE OF IXONIA III               | JEFFERSON | Ixonia        | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| MY PLACE OF IXONIA IV                | JEFFERSON | Ixonia        | ADULT FAMILY HOME            | 4   | 25 - 30 minutes |
| ALDEN ESTATES OF JEFFERSON           | JEFFERSON | Jefferson     | NURSING HOME (NH)            | 120 | 25 - 30 minutes |
| ST COLETTA OF WI LOURDES             | JEFFERSON | Jefferson     | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| ST COLETTA OF WI PADUA HEIGHTS       | JEFFERSON | Jefferson     | COMM. BASED RESIDENTIAL FACS | 10  | 25 - 30 minutes |
| ST COLETTA OF WI SAN DAMIANO         | JEFFERSON | Jefferson     | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| ST COLETTA OF WI ST AGNES            | JEFFERSON | Jefferson     | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| ST COLETTA OF WI ST ISIDORE          | JEFFERSON | Jefferson     | COMM. BASED RESIDENTIAL FACS | 10  | 25 - 30 minutes |
| ST COLETTA OF WI ST JOHN THE BAPTIST | JEFFERSON | Jefferson     | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |
| ST COLETTA OF WI ST MARTHA           | JEFFERSON | Jefferson     | COMM. BASED RESIDENTIAL FACS | 8   | 25 - 30 minutes |

|   |           |           |                              |    |                 |
|---|-----------|-----------|------------------------------|----|-----------------|
| ST COLETTA OF WI ST MICHAEL                 | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 8  | 25 - 30 minutes |
| SYLVAN CROSSINGS OF JEFFERSON               | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 20 | 25 - 30 minutes |
| LUEDER HOUSE                                | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 8  | 25 - 30 minutes |
| RAINBOW HOSPICE CARE                        | JEFFERSON | JEFFERSON | HOSPICE                      | 0  | 25 - 30 minutes |
| ST COLETTA OF WI THEODORE                   | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 8  | 25 - 30 minutes |
| ST COLETTA OF WI LUCHENBACH                 | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 8  | 25 - 30 minutes |
| ST COLETTA OF WI ST ROSE                    | JEFFERSON | Jefferson | ADULT FAMILY HOME            | 4  | 25 - 30 minutes |
| ST COLETTA OF WI TAU                        | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 5  | 25 - 30 minutes |
| ST COLETTA OF WI JACOBA                     | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 5  | 25 - 30 minutes |
| ST COLETTA OF WI DOWER CBRF                 | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 8  | 25 - 30 minutes |
| ELITE DAY SERVICES LLC                      | JEFFERSON | Jefferson | ADULT DAY CARE CENTER        | 20 | 25 - 30 minutes |
| ELLENS PLACE                                | JEFFERSON | Jefferson | ADULT FAMILY HOME            | 4  | 25 - 30 minutes |
| ST COLETTA OF WI ST ELIZABETH               | JEFFERSON | Jefferson | ADULT FAMILY HOME            | 4  | 25 - 30 minutes |
| THE WAY AND THE LIGHT LLC                   | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 16 | 25 - 30 minutes |
| SUNSET RIDGE MEMORY CARE                    | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 25 | 25 - 30 minutes |
| JEFFERSON MEMORY CARE LLC                   | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 77 | 25 - 30 minutes |
| ST COLETTA OF WI SETON AFH                  | JEFFERSON | Jefferson | ADULT FAMILY HOME            | 3  | 25 - 30 minutes |
| SUNSET RIDGE JEFFERSON                      | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 26 | 25 - 30 minutes |
| RESCARE HYER                                | JEFFERSON | Jefferson | COMM. BASED RESIDENTIAL FACS | 6  | 25 - 30 minutes |
| ST COLETTA OF WISCONSIN BONAVENTURE HEIGHTS | JEFFERSON | Jefferson | ADULT FAMILY HOME            | 4  | 25 - 30 minutes |
| BUCKAROOS                                   | JEFFERSON | Jefferson | ADULT FAMILY HOME            | 4  | 25 - 30 minutes |
| MY PLACE OF WATERTOWN                       | JEFFERSON | Watertown | COMM. BASED RESIDENTIAL FACS | 6  | 25 - 30 minutes |
| CONCORD AVE 2                               | JEFFERSON | Watertown | ADULT FAMILY HOME            | 4  | 25 - 30 minutes |
| EAST HAVEN                                  | JEFFERSON | Watertown | COMM. BASED RESIDENTIAL FACS | 6  | 25 - 30 minutes |
| CONCORD HEIGHTS 1                           | JEFFERSON | Watertown | ADULT FAMILY HOME            | 4  | 25 - 30 minutes |
| CONCORD HEIGHTS 2                           | JEFFERSON | Watertown | ADULT FAMILY HOME            | 4  | 25 - 30 minutes |

Source: Department of Health & Human Services, 2022 and ESRI, 2023.



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## Appendix B: Esri Business Analyst Report – Age 50+ Profile



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# Age 50+ Profile

Waterloo, Wisconsin 10-20 min  
 Waterloo, Wisconsin  
 Drive Time Band: 0 - 10 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| Demographic Summary                         | Census 2010 |  | 2022      |  | 2027     |             |
|---|-------------|--|-----------|--|----------|-------------|
|   |             |  |           |  | Change   | Annual Rate |
| Total Population                            | 8,419       |  | 8,567     |  | 112      | 0.26%       |
| Population 50+                              | 2,583       |  | 3,107     |  | 38       | 0.24%       |
| Median Age                                  | 37.6        |  | 39.5      |  | -0.1     | -0.05%      |
| Households                                  | 3,213       |  | 3,382     |  | 62       | 0.36%       |
| % Householders 55+                          | 38.2%       |  | 45.7%     |  | 1.4      | 0.61%       |
| Total Owner-Occupied Housing Units          | 2,451       |  | 2,640     |  | 99       | 0.74%       |
| Total Renter-Occupied Housing Units         | 762         |  | 742       |  | -37      | -1.02%      |
| Owner/Renter Ratio (per 100 renters)        | 322         |  | 356       |  | 33.0     | 1.79%       |
| Median Home Value                           | -           |  | \$243,583 |  | \$75,885 | 5.57%       |
| Average Home Value                          | -           |  | \$296,683 |  | \$53,436 | 3.37%       |
| Median Household Income                     | -           |  | \$85,846  |  | \$10,611 | 2.36%       |
| Median Household Income for Householder 55+ | -           |  | \$76,685  |  | \$9,042  | 2.25%       |

| Population by Age and Sex |             |          |        |          |        |          |
|---------------------------|-------------|----------|--------|----------|--------|----------|
| Male Population           | Census 2010 |          | 2022   |          | 2027   |          |
|                           | Number      | % of 50+ | Number | % of 50+ | Number | % of 50+ |
| Total (50+)               | 1,279       | 100.0%   | 1,531  | 100.0%   | 1,543  | 100.0%   |
| 50-54                     | 333         | 26.0%    | 291    | 19.0%    | 259    | 16.8%    |
| 55-59                     | 289         | 22.6%    | 302    | 19.7%    | 272    | 17.6%    |
| 60-64                     | 209         | 16.3%    | 293    | 19.1%    | 269    | 17.4%    |
| 65-69                     | 168         | 13.1%    | 242    | 15.8%    | 258    | 16.7%    |
| 70-74                     | 106         | 8.3%     | 171    | 11.2%    | 205    | 13.3%    |
| 75-79                     | 71          | 5.6%     | 121    | 7.9%     | 138    | 8.9%     |
| 80-84                     | 56          | 4.4%     | 61     | 4.0%     | 88     | 5.7%     |
| 85+                       | 47          | 3.7%     | 50     | 3.3%     | 54     | 3.5%     |

| Female Population | Census 2010 |          | 2022   |          | 2027   |          |
|-------------------|-------------|----------|--------|----------|--------|----------|
|                   | Number      | % of 50+ | Number | % of 50+ | Number | % of 50+ |
| Total (50+)       | 1,302       | 100.0%   | 1,575  | 100.0%   | 1,601  | 100.0%   |
| 50-54             | 320         | 24.6%    | 302    | 19.2%    | 243    | 15.2%    |
| 55-59             | 251         | 19.3%    | 296    | 18.8%    | 286    | 17.9%    |
| 60-64             | 214         | 16.4%    | 288    | 18.3%    | 270    | 16.9%    |
| 65-69             | 160         | 12.3%    | 226    | 14.3%    | 265    | 16.6%    |
| 70-74             | 108         | 8.3%     | 179    | 11.4%    | 199    | 12.4%    |
| 75-79             | 101         | 7.8%     | 128    | 8.1%     | 151    | 9.4%     |
| 80-84             | 68          | 5.2%     | 70     | 4.4%     | 101    | 6.3%     |
| 85+               | 80          | 6.1%     | 86     | 5.5%     | 86     | 5.4%     |

| Total Population | Census 2010 |                | 2022   |                | 2027   |                |
|------------------|-------------|----------------|--------|----------------|--------|----------------|
|                  | Number      | % of Total Pop | Number | % of Total Pop | Number | % of Total Pop |
| Total(50+)       | 2,583       | 30.7%          | 3,107  | 36.3%          | 3,145  | 36.2%          |
| 50-54            | 653         | 7.8%           | 593    | 6.9%           | 502    | 5.8%           |
| 55-59            | 540         | 6.4%           | 598    | 7.0%           | 558    | 6.4%           |
| 60-64            | 423         | 5.0%           | 581    | 6.8%           | 539    | 6.2%           |
| 65-69            | 328         | 3.9%           | 469    | 5.5%           | 523    | 6.0%           |
| 70-74            | 215         | 2.6%           | 350    | 4.1%           | 404    | 4.7%           |
| 75-79            | 172         | 2.0%           | 249    | 2.9%           | 289    | 3.3%           |
| 80-84            | 124         | 1.5%           | 131    | 1.5%           | 189    | 2.2%           |
| 85+              | 128         | 1.5%           | 136    | 1.6%           | 141    | 1.6%           |
| 65+              | 967         | 11.5%          | 1,335  | 15.6%          | 1,546  | 17.8%          |
| 75+              | 424         | 5.0%           | 516    | 6.0%           | 619    | 7.1%           |

**Data Note** - A "-" indicates that the variable was not collected in the 2010 Census.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 10-20 min  
 Waterloo, Wisconsin  
 Drive Time Band: 0 - 10 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| 2022 Households by Income and Age of Householder 55+ |           |         |          |         |          |         |          |         |
|--|-----------|---------|----------|---------|----------|---------|----------|---------|
|  | 55-64     | Percent | 65-74    | Percent | 75+      | Percent | Total    | Percent |
| Total  | 674       | 100%    | 514      | 100%    | 359      | 100%    | 1,547    | 100%    |
| <\$15,000  | 14        | 2.1%    | 22       | 4.3%    | 33       | 9.2%    | 69       | 4.5%    |
| \$15,000-\$24,999                                    | 29        | 4.3%    | 43       | 8.4%    | 58       | 16.2%   | 130      | 8.4%    |
| \$25,000-\$34,999                                    | 33        | 4.9%    | 41       | 8.0%    | 55       | 15.3%   | 129      | 8.3%    |
| \$35,000-\$49,999                                    | 66        | 9.8%    | 70       | 13.6%   | 64       | 17.8%   | 200      | 12.9%   |
| \$50,000-\$74,999                                    | 95        | 14.1%   | 79       | 15.4%   | 39       | 10.9%   | 213      | 13.8%   |
| \$75,000-\$99,999                                    | 165       | 24.5%   | 118      | 23.0%   | 50       | 13.9%   | 333      | 21.5%   |
| \$100,000-\$149,999                                  | 165       | 24.5%   | 72       | 14.0%   | 31       | 8.6%    | 268      | 17.3%   |
| \$150,000-\$199,999                                  | 66        | 9.8%    | 48       | 9.3%    | 26       | 7.2%    | 140      | 9.0%    |
| \$200,000+   | 42        | 6.2%    | 20       | 3.9%    | 3        | 0.8%    | 65       | 4.2%    |
| Median HH Income                                     | \$87,892  |         | \$75,206 |         | \$41,519 |         | \$76,685 |         |
| Average HH Income                                    | \$106,901 |         | \$88,580 |         | \$62,939 |         | \$90,612 |         |

| 2027 Households by Income and Age of Householder 55+ |           |         |           |         |          |         |           |         |
|--|-----------|---------|-----------|---------|----------|---------|-----------|---------|
|  | 55-64     | Percent | 65-74     | Percent | 75+      | Percent | Total     | Percent |
| Total  | 620       | 100%    | 575       | 100%    | 425      | 100%    | 1,620     | 100%    |
| <\$15,000  | 8         | 1.3%    | 13        | 2.3%    | 31       | 7.3%    | 52        | 3.2%    |
| \$15,000-\$24,999                                    | 13        | 2.1%    | 28        | 4.9%    | 44       | 10.4%   | 85        | 5.2%    |
| \$25,000-\$34,999                                    | 15        | 2.4%    | 25        | 4.3%    | 47       | 11.1%   | 87        | 5.4%    |
| \$35,000-\$49,999                                    | 39        | 6.3%    | 58        | 10.1%   | 61       | 14.4%   | 158       | 9.8%    |
| \$50,000-\$74,999                                    | 83        | 13.4%   | 97        | 16.9%   | 60       | 14.1%   | 240       | 14.8%   |
| \$75,000-\$99,999                                    | 150       | 24.2%   | 145       | 25.2%   | 67       | 15.8%   | 362       | 22.3%   |
| \$100,000-\$149,999                                  | 177       | 28.5%   | 100       | 17.4%   | 56       | 13.2%   | 333       | 20.6%   |
| \$150,000-\$199,999                                  | 85        | 13.7%   | 77        | 13.4%   | 52       | 12.2%   | 214       | 13.2%   |
| \$200,000+   | 50        | 8.1%    | 33        | 5.7%    | 7        | 1.6%    | 90        | 5.6%    |
| Median HH Income                                     | \$100,312 |         | \$84,108  |         | \$60,160 |         | \$85,727  |         |
| Average HH Income                                    | \$126,544 |         | \$109,671 |         | \$82,455 |         | \$108,921 |         |

**Data Note:** 2022 household income represents an estimate of annual income as of July 1, 2022.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 10-20 min  
Waterloo, Wisconsin  
Drive Time Band: 0 - 10 minute radius

Prepared by Esri  
Latitude: 43.18383  
Longitude: -88.99012

| Census 2010 Households and Age of Householder | Number | Percent | % Total HHs |
|---|--------|---------|-------------|
| Total   | 1,227  | 100.0%  | 38.2%       |
| Family Households                             | 736    | 60.0%   | 22.9%       |
| Householder Age 55-64                         | 395    | 32.2%   | 12.3%       |
| Householder Age 65-74                         | 211    | 17.2%   | 6.6%        |
| Householder Age 75-84                         | 104    | 8.5%    | 3.2%        |
| Householder Age 85+                           | 26     | 2.1%    | 0.8%        |
| Nonfamily Households                          | 491    | 40.0%   | 15.3%       |
| Householder Age 55-64                         | 168    | 13.7%   | 5.2%        |
| Householder Age 65-74                         | 140    | 11.4%   | 4.4%        |
| Householder Age 75-84                         | 104    | 8.5%    | 3.2%        |
| Householder Age 85+                           | 79     | 6.4%    | 2.5%        |

| Census 2010 Occupied Housing Units by Age of Householder | Number | Percent | % Total HHs |
|--|--------|---------|-------------|
| Total  | 1,226  | 100.0%  | 38.2%       |
| Owner Occupied Housing Units                             | 1,012  | 82.5%   | 31.5%       |
| Householder Age 55-64                                    | 481    | 39.2%   | 15.0%       |
| Householder Age 65-74                                    | 308    | 25.1%   | 9.6%        |
| Householder Age 75-84                                    | 167    | 13.6%   | 5.2%        |
| Householder Age 85+                                      | 56     | 4.6%    | 1.7%        |
| Renter Occupied Housing Units                            | 214    | 17.5%   | 6.7%        |
| Householder Age 55-64                                    | 82     | 6.7%    | 2.6%        |
| Householder Age 65-74                                    | 42     | 3.4%    | 1.3%        |
| Householder Age 75-84                                    | 41     | 3.3%    | 1.3%        |
| Householder Age 85+                                      | 49     | 4.0%    | 1.5%        |

**Data Note:** A family is defined as a householder and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption. Nonfamily households consist of people living alone and households that do not contain any members who are related to the householder. The base for "% Pop" is specific to the row. A Nonrelative is not related to the householder by birth, marriage, or adoption.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.





# Age 50+ Profile

Waterloo, Wisconsin 10-20 min  
 Waterloo, Wisconsin  
 Drive Time Band: 10 - 15 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| Demographic Summary                         | Census 2010 |           |           | 2022-2027 |             |  |
|---|-------------|-----------|-----------|-----------|-------------|--|
|   | 2010        | 2022      | 2027      | Change    | Annual Rate |  |
| Total Population                            | 7,546       | 7,837     | 7,912     | 75        | 0.19%       |  |
| Population 50+                              | 2,689       | 3,224     | 3,291     | 67        | 0.41%       |  |
| Median Age                                  | 40.9        | 43.0      | 43.4      | 0.4       | 0.19%       |  |
| Households                                  | 2,939       | 3,143     | 3,195     | 52        | 0.33%       |  |
| % Householders 55+                          | 41.8%       | 50.3%     | 51.8%     | 1.5       | 0.59%       |  |
| Total Owner-Occupied Housing Units          | 2,284       | 2,345     | 2,425     | 80        | 0.67%       |  |
| Total Renter-Occupied Housing Units         | 654         | 798       | 770       | -28       | -0.71%      |  |
| Owner/Renter Ratio (per 100 renters)        | 349         | 294       | 315       | 21.0      | 1.39%       |  |
| Median Home Value                           | -           | \$278,424 | \$323,890 | \$45,466  | 3.07%       |  |
| Average Home Value                          | -           | \$329,072 | \$365,800 | \$36,728  | 2.14%       |  |
| Median Household Income                     | -           | \$87,531  | \$100,608 | \$13,077  | 2.82%       |  |
| Median Household Income for Householder 55+ | -           | \$75,077  | \$85,912  | \$10,835  | 2.73%       |  |

| Population by Age and Sex |             |          |        |          |        |          |
|---------------------------|-------------|----------|--------|----------|--------|----------|
| Male Population           | Census 2010 |          | 2022   |          | 2027   |          |
|                           | Number      | % of 50+ | Number | % of 50+ | Number | % of 50+ |
| Total (50+)               | 1,306       | 100.0%   | 1,578  | 100.0%   | 1,611  | 100.0%   |
| 50-54                     | 324         | 24.8%    | 277    | 17.6%    | 251    | 15.6%    |
| 55-59                     | 274         | 21.0%    | 295    | 18.7%    | 272    | 16.9%    |
| 60-64                     | 240         | 18.4%    | 299    | 18.9%    | 272    | 16.9%    |
| 65-69                     | 152         | 11.6%    | 248    | 15.7%    | 274    | 17.0%    |
| 70-74                     | 111         | 8.5%     | 203    | 12.9%    | 219    | 13.6%    |
| 75-79                     | 86          | 6.6%     | 120    | 7.6%     | 164    | 10.2%    |
| 80-84                     | 64          | 4.9%     | 73     | 4.6%     | 91     | 5.6%     |
| 85+                       | 55          | 4.2%     | 63     | 4.0%     | 68     | 4.2%     |

| Female Population | Census 2010 |          | 2022   |          | 2027   |          |
|-------------------|-------------|----------|--------|----------|--------|----------|
|                   | Number      | % of 50+ | Number | % of 50+ | Number | % of 50+ |
| Total (50+)       | 1,384       | 100.0%   | 1,648  | 100.0%   | 1,682  | 100.0%   |
| 50-54             | 319         | 23.0%    | 279    | 16.9%    | 233    | 13.9%    |
| 55-59             | 276         | 19.9%    | 287    | 17.4%    | 274    | 16.3%    |
| 60-64             | 210         | 15.2%    | 302    | 18.3%    | 272    | 16.2%    |
| 65-69             | 155         | 11.2%    | 259    | 15.7%    | 283    | 16.8%    |
| 70-74             | 117         | 8.5%     | 191    | 11.6%    | 235    | 14.0%    |
| 75-79             | 104         | 7.5%     | 130    | 7.9%     | 166    | 9.9%     |
| 80-84             | 89          | 6.4%     | 87     | 5.3%     | 107    | 6.4%     |
| 85+               | 114         | 8.2%     | 113    | 6.9%     | 112    | 6.7%     |

| Total Population | Census 2010 |                | 2022   |                | 2027   |                |
|------------------|-------------|----------------|--------|----------------|--------|----------------|
|                  | Number      | % of Total Pop | Number | % of Total Pop | Number | % of Total Pop |
| Total(50+)       | 2,689       | 35.6%          | 3,224  | 41.1%          | 3,291  | 41.6%          |
| 50-54            | 642         | 8.5%           | 555    | 7.1%           | 483    | 6.1%           |
| 55-59            | 550         | 7.3%           | 581    | 7.4%           | 546    | 6.9%           |
| 60-64            | 449         | 5.9%           | 601    | 7.7%           | 544    | 6.9%           |
| 65-69            | 308         | 4.1%           | 507    | 6.5%           | 556    | 7.0%           |
| 70-74            | 228         | 3.0%           | 394    | 5.0%           | 454    | 5.7%           |
| 75-79            | 190         | 2.5%           | 250    | 3.2%           | 330    | 4.2%           |
| 80-84            | 153         | 2.0%           | 160    | 2.0%           | 198    | 2.5%           |
| 85+              | 169         | 2.2%           | 176    | 2.2%           | 180    | 2.3%           |
| 65+              | 1,048       | 13.9%          | 1,487  | 19.0%          | 1,718  | 21.7%          |
| 75+              | 512         | 6.8%           | 586    | 7.5%           | 708    | 8.9%           |

**Data Note** - A "-" indicates that the variable was not collected in the 2010 Census.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 10-20 min  
 Waterloo, Wisconsin  
 Drive Time Band: 10 - 15 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| 2022 Households by Income and Age of Householder 55+ |           |         |          |         |          |         |          |         |
|--|-----------|---------|----------|---------|----------|---------|----------|---------|
|  | 55-64     | Percent | 65-74    | Percent | 75+      | Percent | Total    | Percent |
| Total  | 659       | 100%    | 542      | 100%    | 378      | 100%    | 1,579    | 100%    |
| <\$15,000  | 18        | 2.7%    | 18       | 3.3%    | 28       | 7.4%    | 64       | 4.1%    |
| \$15,000-\$24,999                                    | 21        | 3.2%    | 35       | 6.5%    | 56       | 14.8%   | 112      | 7.1%    |
| \$25,000-\$34,999                                    | 44        | 6.7%    | 61       | 11.3%   | 96       | 25.4%   | 201      | 12.7%   |
| \$35,000-\$49,999                                    | 36        | 5.5%    | 58       | 10.7%   | 41       | 10.8%   | 135      | 8.5%    |
| \$50,000-\$74,999                                    | 118       | 17.9%   | 113      | 20.8%   | 47       | 12.4%   | 278      | 17.6%   |
| \$75,000-\$99,999                                    | 116       | 17.6%   | 86       | 15.9%   | 33       | 8.7%    | 235      | 14.9%   |
| \$100,000-\$149,999                                  | 169       | 25.6%   | 85       | 15.7%   | 31       | 8.2%    | 285      | 18.0%   |
| \$150,000-\$199,999                                  | 96        | 14.6%   | 67       | 12.4%   | 37       | 9.8%    | 200      | 12.7%   |
| \$200,000+   | 42        | 6.4%    | 19       | 3.5%    | 11       | 2.9%    | 72       | 4.6%    |
| Median HH Income                                     | \$93,722  |         | \$70,702 |         | \$37,905 |         | \$75,077 |         |
| Average HH Income                                    | \$112,527 |         | \$91,300 |         | \$69,540 |         | \$94,770 |         |

| 2027 Households by Income and Age of Householder 55+ |           |         |           |         |          |         |           |         |
|--|-----------|---------|-----------|---------|----------|---------|-----------|---------|
|  | 55-64     | Percent | 65-74     | Percent | 75+      | Percent | Total     | Percent |
| Total  | 601       | 100%    | 603       | 100%    | 452      | 100%    | 1,656     | 100%    |
| <\$15,000  | 10        | 1.7%    | 10        | 1.7%    | 26       | 5.8%    | 46        | 2.8%    |
| \$15,000-\$24,999                                    | 10        | 1.7%    | 25        | 4.1%    | 46       | 10.2%   | 81        | 4.9%    |
| \$25,000-\$34,999                                    | 32        | 5.3%    | 50        | 8.3%    | 96       | 21.2%   | 178       | 10.7%   |
| \$35,000-\$49,999                                    | 27        | 4.5%    | 56        | 9.3%    | 48       | 10.6%   | 131       | 7.9%    |
| \$50,000-\$74,999                                    | 92        | 15.3%   | 120       | 19.9%   | 58       | 12.8%   | 270       | 16.3%   |
| \$75,000-\$99,999                                    | 98        | 16.3%   | 99        | 16.4%   | 42       | 9.3%    | 239       | 14.4%   |
| \$100,000-\$149,999                                  | 174       | 29.0%   | 116       | 19.2%   | 53       | 11.7%   | 343       | 20.7%   |
| \$150,000-\$199,999                                  | 114       | 19.0%   | 102       | 16.9%   | 66       | 14.6%   | 282       | 17.0%   |
| \$200,000+   | 43        | 7.2%    | 25        | 4.1%    | 17       | 3.8%    | 85        | 5.1%    |
| Median HH Income                                     | \$105,491 |         | \$83,395  |         | \$53,211 |         | \$85,912  |         |
| Average HH Income                                    | \$127,717 |         | \$107,254 |         | \$87,649 |         | \$109,396 |         |

**Data Note:** 2022 household income represents an estimate of annual income as of July 1, 2022.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 10-20 min  
Waterloo, Wisconsin  
Drive Time Band: 10 - 15 minute radius

Prepared by Esri  
Latitude: 43.18383  
Longitude: -88.99012

| Census 2010 Households and Age of Householder | Number | Percent | % Total HHs |
|---|--------|---------|-------------|
| Total   | 1,229  | 100.0%  | 41.8%       |
| Family Households                             | 793    | 64.5%   | 27.0%       |
| Householder Age 55-64                         | 424    | 34.5%   | 14.4%       |
| Householder Age 65-74                         | 211    | 17.2%   | 7.2%        |
| Householder Age 75-84                         | 124    | 10.1%   | 4.2%        |
| Householder Age 85+                           | 34     | 2.8%    | 1.2%        |
| Nonfamily Households                          | 436    | 35.5%   | 14.8%       |
| Householder Age 55-64                         | 149    | 12.1%   | 5.1%        |
| Householder Age 65-74                         | 111    | 9.0%    | 3.8%        |
| Householder Age 75-84                         | 107    | 8.7%    | 3.6%        |
| Householder Age 85+                           | 69     | 5.6%    | 2.3%        |

| Census 2010 Occupied Housing Units by Age of Householder | Number | Percent | % Total HHs |
|--|--------|---------|-------------|
| Total  | 1,230  | 100.0%  | 41.9%       |
| Owner Occupied Housing Units                             | 1,058  | 86.0%   | 36.0%       |
| Householder Age 55-64                                    | 510    | 41.5%   | 17.4%       |
| Householder Age 65-74                                    | 289    | 23.5%   | 9.8%        |
| Householder Age 75-84                                    | 190    | 15.4%   | 6.5%        |
| Householder Age 85+                                      | 69     | 5.6%    | 2.3%        |
| Renter Occupied Housing Units                            | 172    | 14.0%   | 5.9%        |
| Householder Age 55-64                                    | 63     | 5.1%    | 2.1%        |
| Householder Age 65-74                                    | 34     | 2.8%    | 1.2%        |
| Householder Age 75-84                                    | 41     | 3.3%    | 1.4%        |
| Householder Age 85+                                      | 34     | 2.8%    | 1.2%        |

**Data Note:** A family is defined as a householder and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption. Nonfamily households consist of people living alone and households that do not contain any members who are related to the householder. The base for "% Pop" is specific to the row. A Nonrelative is not related to the householder by birth, marriage, or adoption.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 10-20 min  
 Waterloo, Wisconsin  
 Drive Time Band: 15 - 20 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| Demographic Summary                         | Census 2010 |  | 2022      | 2027      | 2022-2027 | 2022-2027   |
|---|-------------|--|-----------|-----------|-----------|-------------|
|   |             |  |           |           | Change    | Annual Rate |
| Total Population                            | 38,998      |  | 42,967    | 43,884    | 917       | 0.42%       |
| Population 50+                              | 12,005      |  | 15,499    | 16,033    | 534       | 0.68%       |
| Median Age                                  | 37.0        |  | 39.4      | 40.0      | 0.6       | 0.30%       |
| Households                                  | 14,984      |  | 16,928    | 17,399    | 471       | 0.55%       |
| % Householders 55+                          | 37.5%       |  | 44.9%     | 45.9%     | 1.0       | 0.44%       |
| Total Owner-Occupied Housing Units          | 10,654      |  | 11,997    | 12,507    | 510       | 0.84%       |
| Total Renter-Occupied Housing Units         | 4,333       |  | 4,931     | 4,892     | -39       | -0.16%      |
| Owner/Renter Ratio (per 100 renters)        | 246         |  | 243       | 256       | 13.0      | 1.05%       |
| Median Home Value                           | -           |  | \$283,143 | \$327,874 | \$44,731  | 2.98%       |
| Average Home Value                          | -           |  | \$324,318 | \$365,106 | \$40,788  | 2.40%       |
| Median Household Income                     | -           |  | \$81,136  | \$94,285  | \$13,149  | 3.05%       |
| Median Household Income for Householder 55+ | -           |  | \$69,273  | \$82,360  | \$13,087  | 3.52%       |

| Population by Age and Sex |             |          |        |          |        |          |
|---------------------------|-------------|----------|--------|----------|--------|----------|
| Male Population           | Census 2010 |          | 2022   |          | 2027   |          |
|                           | Number      | % of 50+ | Number | % of 50+ | Number | % of 50+ |
| Total (50+)               | 5,637       | 100.0%   | 7,393  | 100.0%   | 7,631  | 100.0%   |
| 50-54                     | 1,521       | 27.0%    | 1,363  | 18.4%    | 1,296  | 17.0%    |
| 55-59                     | 1,216       | 21.6%    | 1,510  | 20.4%    | 1,314  | 17.2%    |
| 60-64                     | 990         | 17.6%    | 1,408  | 19.0%    | 1,376  | 18.0%    |
| 65-69                     | 605         | 10.7%    | 1,145  | 15.5%    | 1,262  | 16.5%    |
| 70-74                     | 478         | 8.5%     | 872    | 11.8%    | 997    | 13.1%    |
| 75-79                     | 363         | 6.4%     | 490    | 6.6%     | 709    | 9.3%     |
| 80-84                     | 247         | 4.4%     | 326    | 4.4%     | 367    | 4.8%     |
| 85+                       | 217         | 3.8%     | 279    | 3.8%     | 310    | 4.1%     |

| Female Population | Census 2010 |          | 2022   |          | 2027   |          |
|-------------------|-------------|----------|--------|----------|--------|----------|
|                   | Number      | % of 50+ | Number | % of 50+ | Number | % of 50+ |
| Total (50+)       | 6,369       | 100.0%   | 8,104  | 100.0%   | 8,400  | 100.0%   |
| 50-54             | 1,438       | 22.6%    | 1,363  | 16.8%    | 1,324  | 15.8%    |
| 55-59             | 1,295       | 20.3%    | 1,522  | 18.8%    | 1,318  | 15.7%    |
| 60-64             | 973         | 15.3%    | 1,416  | 17.5%    | 1,424  | 17.0%    |
| 65-69             | 690         | 10.8%    | 1,264  | 15.6%    | 1,313  | 15.6%    |
| 70-74             | 599         | 9.4%     | 913    | 11.3%    | 1,141  | 13.6%    |
| 75-79             | 487         | 7.6%     | 638    | 7.9%     | 793    | 9.4%     |
| 80-84             | 418         | 6.6%     | 448    | 5.5%     | 528    | 6.3%     |
| 85+               | 469         | 7.4%     | 540    | 6.7%     | 559    | 6.7%     |

| Total Population | Census 2010 |                | 2022   |                | 2027   |                |
|------------------|-------------|----------------|--------|----------------|--------|----------------|
|                  | Number      | % of Total Pop | Number | % of Total Pop | Number | % of Total Pop |
| Total(50+)       | 12,005      | 30.8%          | 15,499 | 36.1%          | 16,033 | 36.5%          |
| 50-54            | 2,959       | 7.6%           | 2,727  | 6.3%           | 2,620  | 6.0%           |
| 55-59            | 2,511       | 6.4%           | 3,032  | 7.1%           | 2,632  | 6.0%           |
| 60-64            | 1,963       | 5.0%           | 2,824  | 6.6%           | 2,800  | 6.4%           |
| 65-69            | 1,296       | 3.3%           | 2,409  | 5.6%           | 2,576  | 5.9%           |
| 70-74            | 1,076       | 2.8%           | 1,785  | 4.2%           | 2,138  | 4.9%           |
| 75-79            | 850         | 2.2%           | 1,129  | 2.6%           | 1,503  | 3.4%           |
| 80-84            | 665         | 1.7%           | 774    | 1.8%           | 895    | 2.0%           |
| 85+              | 685         | 1.8%           | 819    | 1.9%           | 869    | 2.0%           |
| 65+              | 4,572       | 11.7%          | 6,916  | 16.1%          | 7,981  | 18.2%          |
| 75+              | 2,200       | 5.6%           | 2,722  | 6.3%           | 3,267  | 7.4%           |

**Data Note** - A "-" indicates that the variable was not collected in the 2010 Census.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 10-20 min  
 Waterloo, Wisconsin  
 Drive Time Band: 15 - 20 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| 2022 Households by Income and Age of Householder 55+ |           |         |          |         |          |         |          |         |
|--|-----------|---------|----------|---------|----------|---------|----------|---------|
|  | 55-64     | Percent | 65-74    | Percent | 75+      | Percent | Total    | Percent |
| Total  | 3,313     | 100%    | 2,530    | 100%    | 1,767    | 100%    | 7,610    | 100%    |
| <\$15,000  | 122       | 3.7%    | 121      | 4.8%    | 166      | 9.4%    | 409      | 5.4%    |
| \$15,000-\$24,999                                    | 120       | 3.6%    | 156      | 6.2%    | 231      | 13.1%   | 507      | 6.7%    |
| \$25,000-\$34,999                                    | 206       | 6.2%    | 235      | 9.3%    | 363      | 20.5%   | 804      | 10.6%   |
| \$35,000-\$49,999                                    | 242       | 7.3%    | 296      | 11.7%   | 310      | 17.5%   | 848      | 11.1%   |
| \$50,000-\$74,999                                    | 646       | 19.5%   | 577      | 22.8%   | 265      | 15.0%   | 1,488    | 19.6%   |
| \$75,000-\$99,999                                    | 582       | 17.6%   | 391      | 15.5%   | 144      | 8.1%    | 1,117    | 14.7%   |
| \$100,000-\$149,999                                  | 825       | 24.9%   | 437      | 17.3%   | 150      | 8.5%    | 1,412    | 18.6%   |
| \$150,000-\$199,999                                  | 292       | 8.8%    | 180      | 7.1%    | 86       | 4.9%    | 558      | 7.3%    |
| \$200,000+   | 277       | 8.4%    | 137      | 5.4%    | 51       | 2.9%    | 465      | 6.1%    |
| Median HH Income                                     | \$86,761  |         | \$67,929 |         | \$39,710 |         | \$69,273 |         |
| Average HH Income                                    | \$110,014 |         | \$91,232 |         | \$64,094 |         | \$93,132 |         |

| 2027 Households by Income and Age of Householder 55+ |           |         |           |         |          |         |           |         |
|--|-----------|---------|-----------|---------|----------|---------|-----------|---------|
|  | 55-64     | Percent | 65-74     | Percent | 75+      | Percent | Total     | Percent |
| Total  | 3,045     | 100%    | 2,826     | 100%    | 2,120    | 100%    | 7,991     | 100%    |
| <\$15,000  | 68        | 2.2%    | 86        | 3.0%    | 152      | 7.2%    | 306       | 3.8%    |
| \$15,000-\$24,999                                    | 69        | 2.3%    | 119       | 4.2%    | 208      | 9.8%    | 396       | 5.0%    |
| \$25,000-\$34,999                                    | 127       | 4.2%    | 183       | 6.5%    | 331      | 15.6%   | 641       | 8.0%    |
| \$35,000-\$49,999                                    | 170       | 5.6%    | 273       | 9.7%    | 341      | 16.1%   | 784       | 9.8%    |
| \$50,000-\$74,999                                    | 523       | 17.2%   | 587       | 20.8%   | 344      | 16.2%   | 1,454     | 18.2%   |
| \$75,000-\$99,999                                    | 501       | 16.5%   | 448       | 15.9%   | 201      | 9.5%    | 1,150     | 14.4%   |
| \$100,000-\$149,999                                  | 895       | 29.4%   | 625       | 22.1%   | 270      | 12.7%   | 1,790     | 22.4%   |
| \$150,000-\$199,999                                  | 391       | 12.8%   | 303       | 10.7%   | 182      | 8.6%    | 876       | 11.0%   |
| \$200,000+   | 299       | 9.8%    | 201       | 7.1%    | 91       | 4.3%    | 591       | 7.4%    |
| Median HH Income                                     | \$102,013 |         | \$82,461  |         | \$51,410 |         | \$82,360  |         |
| Average HH Income                                    | \$127,838 |         | \$110,120 |         | \$82,589 |         | \$109,609 |         |

**Data Note:** 2022 household income represents an estimate of annual income as of July 1, 2022.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 10-20 min  
Waterloo, Wisconsin  
Drive Time Band: 15 - 20 minute radius

Prepared by Esri  
Latitude: 43.18383  
Longitude: -88.99012

| Census 2010 Households and Age of Householder | Number | Percent | % Total HHs |
|---|--------|---------|-------------|
| Total   | 5,620  | 100.0%  | 37.5%       |
| Family Households                             | 3,383  | 60.2%   | 22.6%       |
| Householder Age 55-64                         | 1,799  | 32.0%   | 12.0%       |
| Householder Age 65-74                         | 922    | 16.4%   | 6.2%        |
| Householder Age 75-84                         | 514    | 9.1%    | 3.4%        |
| Householder Age 85+                           | 148    | 2.6%    | 1.0%        |
| Nonfamily Households                          | 2,237  | 39.8%   | 14.9%       |
| Householder Age 55-64                         | 789    | 14.0%   | 5.3%        |
| Householder Age 65-74                         | 552    | 9.8%    | 3.7%        |
| Householder Age 75-84                         | 546    | 9.7%    | 3.6%        |
| Householder Age 85+                           | 350    | 6.2%    | 2.3%        |

| Census 2010 Occupied Housing Units by Age of Householder | Number | Percent | % Total HHs |
|--|--------|---------|-------------|
| Total  | 5,619  | 100.0%  | 37.5%       |
| Owner Occupied Housing Units                             | 4,304  | 76.6%   | 28.7%       |
| Householder Age 55-64                                    | 2,111  | 37.6%   | 14.1%       |
| Householder Age 65-74                                    | 1,185  | 21.1%   | 7.9%        |
| Householder Age 75-84                                    | 744    | 13.2%   | 5.0%        |
| Householder Age 85+                                      | 264    | 4.7%    | 1.8%        |
| Renter Occupied Housing Units                            | 1,315  | 23.4%   | 8.8%        |
| Householder Age 55-64                                    | 476    | 8.5%    | 3.2%        |
| Householder Age 65-74                                    | 290    | 5.2%    | 1.9%        |
| Householder Age 75-84                                    | 315    | 5.6%    | 2.1%        |
| Householder Age 85+                                      | 234    | 4.2%    | 1.6%        |

**Data Note:** A family is defined as a householder and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption. Nonfamily households consist of people living alone and households that do not contain any members who are related to the householder. The base for "% Pop" is specific to the row. A Nonrelative is not related to the householder by birth, marriage, or adoption.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.





# Age 50+ Profile

Waterloo, Wisconsin 20-30 min  
 Waterloo, Wisconsin  
 Drive Time Band: 20 - 25 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| Demographic Summary                         | Census 2010 |                | 2022      |                | 2027      |                |
|---|-------------|----------------|-----------|----------------|-----------|----------------|
|   | Number      | % of 50+       | Number    | % of 50+       | Number    | % of 50+       |
| Total Population                            | 74,967      |                | 86,189    |                | 88,142    |                |
| Population 50+                              | 21,777      |                | 28,408    |                | 29,367    |                |
| Median Age                                  | 35.6        |                | 37.6      |                | 38.1      |                |
| Households                                  | 30,227      |                | 35,750    |                | 36,714    |                |
| % Householders 55+                          | 34.4%       |                | 40.1%     |                | 41.1%     |                |
| Total Owner-Occupied Housing Units          | 18,963      |                | 22,882    |                | 23,877    |                |
| Total Renter-Occupied Housing Units         | 11,261      |                | 12,868    |                | 12,837    |                |
| Owner/Renter Ratio (per 100 renters)        | 168         |                | 178       |                | 186       |                |
| Median Home Value                           | -           |                | \$278,083 |                | \$315,594 |                |
| Average Home Value                          | -           |                | \$299,892 |                | \$335,386 |                |
| Median Household Income                     | -           |                | \$82,506  |                | \$96,342  |                |
| Median Household Income for Householder 55+ | -           |                | \$69,562  |                | \$82,871  |                |
| <b>Population by Age and Sex</b>            |             |                |           |                |           |                |
| Male Population                             | Census 2010 |                | 2022      |                | 2027      |                |
|   | Number      | % of 50+       | Number    | % of 50+       | Number    | % of 50+       |
| Total (50+)                                 | 9,968       | 100.0%         | 13,284    | 100.0%         | 13,758    | 100.0%         |
| 50-54                                       | 2,562       | 25.7%          | 2,677     | 20.2%          | 2,584     | 18.8%          |
| 55-59                                       | 2,190       | 22.0%          | 2,687     | 20.2%          | 2,489     | 18.1%          |
| 60-64                                       | 1,752       | 17.6%          | 2,395     | 18.0%          | 2,371     | 17.2%          |
| 65-69                                       | 1,080       | 10.8%          | 1,975     | 14.9%          | 2,104     | 15.3%          |
| 70-74                                       | 818         | 8.2%           | 1,506     | 11.3%          | 1,682     | 12.2%          |
| 75-79                                       | 618         | 6.2%           | 916       | 6.9%           | 1,238     | 9.0%           |
| 80-84                                       | 459         | 4.6%           | 569       | 4.3%           | 683       | 5.0%           |
| 85+   | 489         | 4.9%           | 559       | 4.2%           | 607       | 4.4%           |
| Female Population                           | Census 2010 |                | 2022      |                | 2027      |                |
|   | Number      | % of 50+       | Number    | % of 50+       | Number    | % of 50+       |
| Total (50+)                                 | 11,810      | 100.0%         | 15,123    | 100.0%         | 15,608    | 100.0%         |
| 50-54                                       | 2,610       | 22.1%          | 2,771     | 18.3%          | 2,533     | 16.2%          |
| 55-59                                       | 2,339       | 19.8%          | 2,750     | 18.2%          | 2,642     | 16.9%          |
| 60-64                                       | 1,880       | 15.9%          | 2,578     | 17.0%          | 2,462     | 15.8%          |
| 65-69                                       | 1,240       | 10.5%          | 2,204     | 14.6%          | 2,309     | 14.8%          |
| 70-74                                       | 1,012       | 8.6%           | 1,777     | 11.8%          | 2,045     | 13.1%          |
| 75-79                                       | 861         | 7.3%           | 1,199     | 7.9%           | 1,551     | 9.9%           |
| 80-84                                       | 761         | 6.4%           | 807       | 5.3%           | 999       | 6.4%           |
| 85+   | 1,107       | 9.4%           | 1,037     | 6.9%           | 1,067     | 6.8%           |
| Total Population                            | Census 2010 |                | 2022      |                | 2027      |                |
|   | Number      | % of Total Pop | Number    | % of Total Pop | Number    | % of Total Pop |
| Total(50+)                                  | 21,777      | 29.0%          | 28,408    | 33.0%          | 29,367    | 33.3%          |
| 50-54                                       | 5,171       | 6.9%           | 5,448     | 6.3%           | 5,117     | 5.8%           |
| 55-59                                       | 4,530       | 6.0%           | 5,437     | 6.3%           | 5,131     | 5.8%           |
| 60-64                                       | 3,632       | 4.8%           | 4,973     | 5.8%           | 4,833     | 5.5%           |
| 65-69                                       | 2,320       | 3.1%           | 4,179     | 4.8%           | 4,414     | 5.0%           |
| 70-74                                       | 1,830       | 2.4%           | 3,283     | 3.8%           | 3,727     | 4.2%           |
| 75-79                                       | 1,478       | 2.0%           | 2,116     | 2.5%           | 2,789     | 3.2%           |
| 80-84                                       | 1,220       | 1.6%           | 1,376     | 1.6%           | 1,682     | 1.9%           |
| 85+   | 1,596       | 2.1%           | 1,596     | 1.9%           | 1,674     | 1.9%           |
| 65+   | 8,444       | 11.3%          | 12,550    | 14.6%          | 14,286    | 16.2%          |
| 75+   | 4,294       | 5.7%           | 5,088     | 5.9%           | 6,145     | 7.0%           |

**Data Note** - A "-" indicates that the variable was not collected in the 2010 Census.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 20-30 min  
 Waterloo, Wisconsin  
 Drive Time Band: 20 - 25 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| 2022 Households by Income and Age of Householder 55+ |           |         |          |         |          |         |          |         |
|--|-----------|---------|----------|---------|----------|---------|----------|---------|
|  | 55-64     | Percent | 65-74    | Percent | 75+      | Percent | Total    | Percent |
| Total  | 6,181     | 100%    | 4,701    | 100%    | 3,445    | 100%    | 14,327   | 100%    |
| <\$15,000  | 199       | 3.2%    | 187      | 4.0%    | 215      | 6.2%    | 601      | 4.2%    |
| \$15,000-\$24,999                                    | 238       | 3.9%    | 280      | 6.0%    | 545      | 15.8%   | 1,063    | 7.4%    |
| \$25,000-\$34,999                                    | 338       | 5.5%    | 443      | 9.4%    | 644      | 18.7%   | 1,425    | 9.9%    |
| \$35,000-\$49,999                                    | 549       | 8.9%    | 649      | 13.8%   | 620      | 18.0%   | 1,818    | 12.7%   |
| \$50,000-\$74,999                                    | 1,154     | 18.7%   | 986      | 21.0%   | 550      | 16.0%   | 2,690    | 18.8%   |
| \$75,000-\$99,999                                    | 1,059     | 17.1%   | 746      | 15.9%   | 304      | 8.8%    | 2,109    | 14.7%   |
| \$100,000-\$149,999                                  | 1,540     | 24.9%   | 824      | 17.5%   | 275      | 8.0%    | 2,639    | 18.4%   |
| \$150,000-\$199,999                                  | 663       | 10.7%   | 343      | 7.3%    | 200      | 5.8%    | 1,206    | 8.4%    |
| \$200,000+   | 441       | 7.1%    | 243      | 5.2%    | 92       | 2.7%    | 776      | 5.4%    |
| Median HH Income                                     | \$87,523  |         | \$68,340 |         | \$41,367 |         | \$69,562 |         |
| Average HH Income                                    | \$108,424 |         | \$91,028 |         | \$65,607 |         | \$92,420 |         |

| 2027 Households by Income and Age of Householder 55+ |           |         |           |         |          |         |           |         |
|--|-----------|---------|-----------|---------|----------|---------|-----------|---------|
|  | 55-64     | Percent | 65-74     | Percent | 75+      | Percent | Total     | Percent |
| Total  | 5,862     | 100%    | 5,087     | 100%    | 4,135    | 100%    | 15,084    | 100%    |
| <\$15,000  | 109       | 1.9%    | 122       | 2.4%    | 198      | 4.8%    | 429       | 2.8%    |
| \$15,000-\$24,999                                    | 146       | 2.5%    | 203       | 4.0%    | 449      | 10.9%   | 798       | 5.3%    |
| \$25,000-\$34,999                                    | 226       | 3.9%    | 358       | 7.0%    | 611      | 14.8%   | 1,195     | 7.9%    |
| \$35,000-\$49,999                                    | 384       | 6.6%    | 549       | 10.8%   | 651      | 15.7%   | 1,584     | 10.5%   |
| \$50,000-\$74,999                                    | 924       | 15.8%   | 995       | 19.6%   | 742      | 17.9%   | 2,661     | 17.6%   |
| \$75,000-\$99,999                                    | 980       | 16.7%   | 859       | 16.9%   | 444      | 10.7%   | 2,283     | 15.1%   |
| \$100,000-\$149,999                                  | 1,700     | 29.0%   | 1,126     | 22.1%   | 468      | 11.3%   | 3,294     | 21.8%   |
| \$150,000-\$199,999                                  | 887       | 15.1%   | 535       | 10.5%   | 402      | 9.7%    | 1,824     | 12.1%   |
| \$200,000+   | 506       | 8.6%    | 340       | 6.7%    | 170      | 4.1%    | 1,016     | 6.7%    |
| Median HH Income                                     | \$102,772 |         | \$82,430  |         | \$53,833 |         | \$82,871  |         |
| Average HH Income                                    | \$126,569 |         | \$108,867 |         | \$84,188 |         | \$108,981 |         |

**Data Note:** 2022 household income represents an estimate of annual income as of July 1, 2022.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 20-30 min  
 Waterloo, Wisconsin  
 Drive Time Band: 20 - 25 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| Census 2010 Households and Age of Householder | Number | Percent | % Total HHs |
|---|--------|---------|-------------|
| Total   | 10,396 | 100.0%  | 34.4%       |
| Family Households                             | 5,805  | 55.8%   | 19.2%       |
| Householder Age 55-64                         | 3,167  | 30.5%   | 10.5%       |
| Householder Age 65-74                         | 1,573  | 15.1%   | 5.2%        |
| Householder Age 75-84                         | 814    | 7.8%    | 2.7%        |
| Householder Age 85+                           | 251    | 2.4%    | 0.8%        |
| Nonfamily Households                          | 4,591  | 44.2%   | 15.2%       |
| Householder Age 55-64                         | 1,721  | 16.6%   | 5.7%        |
| Householder Age 65-74                         | 1,046  | 10.1%   | 3.5%        |
| Householder Age 75-84                         | 1,025  | 9.9%    | 3.4%        |
| Householder Age 85+                           | 799    | 7.7%    | 2.6%        |

| Census 2010 Occupied Housing Units by Age of Householder | Number | Percent | % Total HHs |
|--|--------|---------|-------------|
| Total  | 10,396 | 100.0%  | 34.4%       |
| Owner Occupied Housing Units                             | 7,302  | 70.2%   | 24.2%       |
| Householder Age 55-64                                    | 3,779  | 36.4%   | 12.5%       |
| Householder Age 65-74                                    | 1,980  | 19.0%   | 6.6%        |
| Householder Age 75-84                                    | 1,162  | 11.2%   | 3.8%        |
| Householder Age 85+                                      | 381    | 3.7%    | 1.3%        |
| Renter Occupied Housing Units                            | 3,094  | 29.8%   | 10.2%       |
| Householder Age 55-64                                    | 1,110  | 10.7%   | 3.7%        |
| Householder Age 65-74                                    | 639    | 6.1%    | 2.1%        |
| Householder Age 75-84                                    | 677    | 6.5%    | 2.2%        |
| Householder Age 85+                                      | 668    | 6.4%    | 2.2%        |

**Data Note:** A family is defined as a householder and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption. Nonfamily households consist of people living alone and households that do not contain any members who are related to the householder. The base for "% Pop" is specific to the row. A Nonrelative is not related to the householder by birth, marriage, or adoption.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 20-30 min  
 Waterloo, Wisconsin  
 Drive Time Band: 25 - 30 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| Demographic Summary                         | Census 2010 |                |          | 2022      |                |          | 2022-2027 |             |
|---|-------------|----------------|----------|-----------|----------------|----------|-----------|-------------|
|   | Number      | % of Total Pop | % of 50+ | Number    | % of Total Pop | % of 50+ | Change    | Annual Rate |
| Total Population                            | 101,763     |                |          | 113,328   |                |          | 116,778   | 0.60%       |
| Population 50+                              | 32,841      |                |          | 41,242    |                |          | 42,615    | 0.66%       |
| Median Age                                  | 37.7        |                |          | 39.7      |                |          | 40.1      | 0.20%       |
| Households                                  | 44,386      |                |          | 51,037    |                |          | 52,953    | 0.74%       |
| % Householders 55+                          | 36.5%       |                |          | 43.1%     |                |          | 43.7%     | 0.28%       |
| Total Owner-Occupied Housing Units          | 27,762      |                |          | 32,321    |                |          | 33,823    | 0.91%       |
| Total Renter-Occupied Housing Units         | 16,624      |                |          | 18,716    |                |          | 19,130    | 0.44%       |
| Owner/Renter Ratio (per 100 renters)        | 167         |                |          | 173       |                |          | 177       | 0.46%       |
| Median Home Value                           | -           |                |          | \$273,106 |                |          | \$315,489 | 2.93%       |
| Average Home Value                          | -           |                |          | \$313,265 |                |          | \$358,086 | 2.71%       |
| Median Household Income                     | -           |                |          | \$77,151  |                |          | \$89,204  | 2.95%       |
| Median Household Income for Householder 55+ | -           |                |          | \$66,947  |                |          | \$79,739  | 3.56%       |

| Population by Age and Sex |             |          |        |          |        |          |
|---------------------------|-------------|----------|--------|----------|--------|----------|
| Male Population           | Census 2010 |          | 2022   |          | 2027   |          |
|                           | Number      | % of 50+ | Number | % of 50+ | Number | % of 50+ |
| Total (50+)               | 15,242      | 100.0%   | 19,333 | 100.0%   | 19,964 | 100.0%   |
| 50-54                     | 3,858       | 25.3%    | 3,581  | 18.5%    | 3,411  | 17.1%    |
| 55-59                     | 3,536       | 23.2%    | 3,731  | 19.3%    | 3,410  | 17.1%    |
| 60-64                     | 2,714       | 17.8%    | 3,574  | 18.5%    | 3,414  | 17.1%    |
| 65-69                     | 1,762       | 11.6%    | 3,048  | 15.8%    | 3,197  | 16.0%    |
| 70-74                     | 1,227       | 8.1%     | 2,309  | 11.9%    | 2,705  | 13.5%    |
| 75-79                     | 906         | 5.9%     | 1,466  | 7.6%     | 1,878  | 9.4%     |
| 80-84                     | 695         | 4.6%     | 865    | 4.5%     | 1,113  | 5.6%     |
| 85+                       | 544         | 3.6%     | 759    | 3.9%     | 836    | 4.2%     |

| Female Population | Census 2010 |          | 2022   |          | 2027   |          |
|-------------------|-------------|----------|--------|----------|--------|----------|
|                   | Number      | % of 50+ | Number | % of 50+ | Number | % of 50+ |
| Total (50+)       | 17,597      | 100.0%   | 21,910 | 100.0%   | 22,653 | 100.0%   |
| 50-54             | 3,956       | 22.5%    | 3,585  | 16.4%    | 3,443  | 15.2%    |
| 55-59             | 3,760       | 21.4%    | 3,913  | 17.9%    | 3,519  | 15.5%    |
| 60-64             | 2,955       | 16.8%    | 3,836  | 17.5%    | 3,669  | 16.2%    |
| 65-69             | 1,939       | 11.0%    | 3,487  | 15.9%    | 3,541  | 15.6%    |
| 70-74             | 1,429       | 8.1%     | 2,729  | 12.5%    | 3,187  | 14.1%    |
| 75-79             | 1,235       | 7.0%     | 1,804  | 8.2%     | 2,370  | 10.5%    |
| 80-84             | 1,108       | 6.3%     | 1,156  | 5.3%     | 1,477  | 6.5%     |
| 85+               | 1,215       | 6.9%     | 1,400  | 6.4%     | 1,447  | 6.4%     |

| Total Population | Census 2010 |                | 2022   |                | 2027   |                |
|------------------|-------------|----------------|--------|----------------|--------|----------------|
|                  | Number      | % of Total Pop | Number | % of Total Pop | Number | % of Total Pop |
| Total(50+)       | 32,841      | 32.3%          | 41,242 | 36.4%          | 42,615 | 36.5%          |
| 50-54            | 7,813       | 7.7%           | 7,166  | 6.3%           | 6,854  | 5.9%           |
| 55-59            | 7,297       | 7.2%           | 7,644  | 6.7%           | 6,929  | 5.9%           |
| 60-64            | 5,669       | 5.6%           | 7,410  | 6.5%           | 7,082  | 6.1%           |
| 65-69            | 3,702       | 3.6%           | 6,535  | 5.8%           | 6,738  | 5.8%           |
| 70-74            | 2,656       | 2.6%           | 5,037  | 4.4%           | 5,892  | 5.0%           |
| 75-79            | 2,142       | 2.1%           | 3,270  | 2.9%           | 4,247  | 3.6%           |
| 80-84            | 1,803       | 1.8%           | 2,021  | 1.8%           | 2,590  | 2.2%           |
| 85+              | 1,759       | 1.7%           | 2,159  | 1.9%           | 2,283  | 2.0%           |
| 65+              | 12,062      | 11.9%          | 19,022 | 16.8%          | 21,750 | 18.6%          |
| 75+              | 5,704       | 5.6%           | 7,450  | 6.6%           | 9,120  | 7.8%           |

**Data Note** - A "-" indicates that the variable was not collected in the 2010 Census.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



# Age 50+ Profile

Waterloo, Wisconsin 20-30 min  
 Waterloo, Wisconsin  
 Drive Time Band: 25 - 30 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| 2022 Households by Income and Age of Householder 55+ |           |         |          |         |          |         |          |         |
|--|-----------|---------|----------|---------|----------|---------|----------|---------|
|  | 55-64     | Percent | 65-74    | Percent | 75+      | Percent | Total    | Percent |
| Total  | 9,299     | 100%    | 7,508    | 100%    | 5,178    | 100%    | 21,985   | 100%    |
| <\$15,000  | 407       | 4.4%    | 370      | 4.9%    | 404      | 7.8%    | 1,181    | 5.4%    |
| \$15,000-\$24,999                                    | 381       | 4.1%    | 478      | 6.4%    | 744      | 14.4%   | 1,603    | 7.3%    |
| \$25,000-\$34,999                                    | 548       | 5.9%    | 617      | 8.2%    | 848      | 16.4%   | 2,013    | 9.2%    |
| \$35,000-\$49,999                                    | 830       | 8.9%    | 1,062    | 14.1%   | 989      | 19.1%   | 2,881    | 13.1%   |
| \$50,000-\$74,999                                    | 1,875     | 20.2%   | 1,705    | 22.7%   | 806      | 15.6%   | 4,386    | 19.9%   |
| \$75,000-\$99,999                                    | 1,544     | 16.6%   | 1,149    | 15.3%   | 460      | 8.9%    | 3,153    | 14.3%   |
| \$100,000-\$149,999                                  | 2,245     | 24.1%   | 1,288    | 17.2%   | 461      | 8.9%    | 3,994    | 18.2%   |
| \$150,000-\$199,999                                  | 913       | 9.8%    | 466      | 6.2%    | 328      | 6.3%    | 1,707    | 7.8%    |
| \$200,000+   | 557       | 6.0%    | 372      | 5.0%    | 138      | 2.7%    | 1,067    | 4.9%    |
| Median HH Income                                     | \$83,043  |         | \$65,730 |         | \$42,647 |         | \$66,947 |         |
| Average HH Income                                    | \$103,640 |         | \$89,352 |         | \$67,382 |         | \$90,221 |         |

| 2027 Households by Income and Age of Householder 55+ |           |         |           |         |          |         |           |         |
|--|-----------|---------|-----------|---------|----------|---------|-----------|---------|
|  | 55-64     | Percent | 65-74     | Percent | 75+      | Percent | Total     | Percent |
| Total  | 8,657     | 100%    | 8,146     | 100%    | 6,330    | 100%    | 23,133    | 100%    |
| <\$15,000  | 222       | 2.6%    | 245       | 3.0%    | 359      | 5.7%    | 826       | 3.6%    |
| \$15,000-\$24,999                                    | 211       | 2.4%    | 322       | 4.0%    | 592      | 9.4%    | 1,125     | 4.9%    |
| \$25,000-\$34,999                                    | 369       | 4.3%    | 486       | 6.0%    | 770      | 12.2%   | 1,625     | 7.0%    |
| \$35,000-\$49,999                                    | 664       | 7.7%    | 1,003     | 12.3%   | 1,113    | 17.6%   | 2,780     | 12.0%   |
| \$50,000-\$74,999                                    | 1,557     | 18.0%   | 1,781     | 21.9%   | 1,077    | 17.0%   | 4,415     | 19.1%   |
| \$75,000-\$99,999                                    | 1,367     | 15.8%   | 1,285     | 15.8%   | 666      | 10.5%   | 3,318     | 14.3%   |
| \$100,000-\$149,999                                  | 2,475     | 28.6%   | 1,770     | 21.7%   | 847      | 13.4%   | 5,092     | 22.0%   |
| \$150,000-\$199,999                                  | 1,213     | 14.0%   | 755       | 9.3%    | 661      | 10.4%   | 2,629     | 11.4%   |
| \$200,000+   | 580       | 6.7%    | 499       | 6.1%    | 245      | 3.9%    | 1,324     | 5.7%    |
| Median HH Income                                     | \$98,541  |         | \$78,512  |         | \$55,787 |         | \$79,739  |         |
| Average HH Income                                    | \$119,483 |         | \$105,929 |         | \$86,744 |         | \$105,747 |         |

**Data Note:** 2022 household income represents an estimate of annual income as of July 1, 2022.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.



## Age 50+ Profile

Waterloo, Wisconsin 20-30 min  
 Waterloo, Wisconsin  
 Drive Time Band: 25 - 30 minute radius

Prepared by Esri  
 Latitude: 43.18383  
 Longitude: -88.99012

| Census 2010 Households and Age of Householder | Number | Percent | % Total HHs |
|---|--------|---------|-------------|
| Total   | 16,206 | 100.0%  | 36.5%       |
| Family Households                             | 8,675  | 53.5%   | 19.5%       |
| Householder Age 55-64                         | 4,675  | 28.8%   | 10.5%       |
| Householder Age 65-74                         | 2,342  | 14.5%   | 5.3%        |
| Householder Age 75-84                         | 1,301  | 8.0%    | 2.9%        |
| Householder Age 85+                           | 357    | 2.2%    | 0.8%        |
| Nonfamily Households                          | 7,531  | 46.5%   | 17.0%       |
| Householder Age 55-64                         | 3,443  | 21.2%   | 7.8%        |
| Householder Age 65-74                         | 1,726  | 10.7%   | 3.9%        |
| Householder Age 75-84                         | 1,461  | 9.0%    | 3.3%        |
| Householder Age 85+                           | 901    | 5.6%    | 2.0%        |

| Census 2010 Occupied Housing Units by Age of Householder | Number | Percent | % Total HHs |
|--|--------|---------|-------------|
| Total  | 16,208 | 100.0%  | 36.5%       |
| Owner Occupied Housing Units                             | 12,203 | 75.3%   | 27.5%       |
| Householder Age 55-64                                    | 6,306  | 38.9%   | 14.2%       |
| Householder Age 65-74                                    | 3,163  | 19.5%   | 7.1%        |
| Householder Age 75-84                                    | 2,017  | 12.4%   | 4.5%        |
| Householder Age 85+                                      | 717    | 4.4%    | 1.6%        |
| Renter Occupied Housing Units                            | 4,005  | 24.7%   | 9.0%        |
| Householder Age 55-64                                    | 1,812  | 11.2%   | 4.1%        |
| Householder Age 65-74                                    | 906    | 5.6%    | 2.0%        |
| Householder Age 75-84                                    | 745    | 4.6%    | 1.7%        |
| Householder Age 85+                                      | 542    | 3.3%    | 1.2%        |

**Data Note:** A family is defined as a householder and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption. Nonfamily households consist of people living alone and households that do not contain any members who are related to the householder. The base for "% Pop" is specific to the row. A Nonrelative is not related to the householder by birth, marriage, or adoption.

**Source:** Esri forecasts for 2022 and 2027. U.S. Census Bureau 2010 decennial Census data converted by Esri into 2020 geography.





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## Appendix C: AARP's The 8 Domains of Livability



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# The **AARP** Network of Age-Friendly Communities

and work within **AARP**  
Real Possibilities

## The 8 Domains of Livability

help communities become great for people of all ages



Learn more at [AARP.org/agefriendly](https://www.aarp.org/agefriendly)

Images from the Age-Friendly Inspiring Communities Report: [aarp.org/livability-examples](http://aarp.org/livability-examples)

## The 8 Domains



### Domain 1

#### Outdoor Spaces and Buildings

People need places to gather — indoors and out. Parks, sidewalks, safe streets, outdoor seating and accessible buildings (think elevators, stairs with railing, etc.) can be used and enjoyed by people of all ages.



### Domain 2

#### Transportation

Driving shouldn't be the only way to get around. Public transit options can be as expansive as a train system or as targeted as a taxi service that provides non-drivers with rides to and from a doctor's office.



### Domain 3

#### Housing

Most older adults want to age in place. Doing so is possible if homes are appropriately designed or modified — and if a community includes affordable housing options for varying life stages.



### Domain 4

#### Social Participation

Regardless of one's age, loneliness negatively affects a person's health and sense of wellbeing. Isolation can be combatted by the availability of accessible, affordable and fun social activities.



**Domain 5**  
**Respect and Social Inclusion**  
Intergenerational activities are a great way for young and old to learn from one another, honor what each has to offer and, at the same time, feel good about themselves.



**Domain 6**  
**Civic Participation and Employment**  
An age-friendly community provides ways older people can, if they choose to, work for pay, volunteer their skills and be actively engaged in community life.



**Domain 7**  
**Communication and Information**  
Age-friendly communities recognize that not everyone has a smartphone or Internet access and that information needs to be disseminated through a variety of means.



**Domain 8**  
**Community and Health Services**  
At some point, everyone gets hurt, becomes ill or simply needs a bit of help. While it's important that care be available nearby, it's essential that residents are able to access and afford the services required.





**BUILDING TRUST**  
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W61N497 Washington Avenue  
Cedarburg, WI 53012  
262-204-2360

2820 Walton Commons West  
Suite 142  
Madison, WI 53718  
608-249-5046



1695 Bellevue Street  
Green Bay, WI 54311  
920-491-9081

604 Wilson Avenue  
Menomonie, WI 54751  
715-235-9081

[www.cedarcorp.com](http://www.cedarcorp.com)

## Original Alcohol Beverage License Application

|                 |
|-----------------|
| FOR CLERKS ONLY |
| Municipality    |
| License Period  |

**License(s) Requested**

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> Class "A" Beer ..... \$ _____<br><input type="checkbox"/> Class "B" Beer ..... \$ _____<br><input type="checkbox"/> "Class C" Wine ..... \$ _____<br><input type="checkbox"/> Reserve "Class B" Liquor \$ _____ | <input checked="" type="checkbox"/> "Class A" Liquor ..... \$ _____<br><input type="checkbox"/> "Class B" Liquor ..... \$ _____<br><input type="checkbox"/> "Class A" Liquor (Cider Only) \$ 0<br><input type="checkbox"/> "Class B" (Wine Only) Winery \$ _____ |
|---|--|

|                   |                             |
|-------------------|-----------------------------|
| License Fees      | \$ 1000 <sup>00</sup>       |
| Publication Fee   | \$ 10 <sup>00</sup>         |
| Background Check  | \$                          |
| <b>Total Fees</b> | <b>\$ 1010<sup>00</sup></b> |

| Part A: Premises/Business Information   |                                     |                        |
|---|-------------------------------------|------------------------|
| 1. Legal Business Name (registered entity name or individual's name if sole proprietorship)<br><b>Hardyspot 102, LLC</b>  |                                     |                        |
| 2. Trade Name or DBA  |                                     |                        |
| 3. Premises Address<br><b>300 W Madison Street</b>  |                                     |                        |
| 4. County<br><b>Jefferson</b>   | 5. Municipality<br><b>Waterloo</b>  | 6. Aldermanic District |
| 7. Mailing Address (if different from premises address)   |                                     |                        |
| 8. FEIN<br><b>93-1409343</b>  | 9. Wisconsin Seller's Permit Number |                        |
| 10. Premises Phone<br><b>920-478-2870</b>   | 11. Premises Email                  |                        |
| 12. Entity Type (check one)<br><input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Corporation <input type="checkbox"/> Nonprofit Organization  |                                     |                        |
| 13. Premises Description - Describe the building or buildings where alcohol beverages are to be sold and stored. Describe all rooms including living quarters, if used, for the sales, service, consumption, and/or storage of alcohol beverages and records. Alcohol beverages may be sold and stored ONLY on the premises described in this application. Attach additional sheets if necessary.<br><br><b>Single Store Retail Convenience Store</b> |                                     |                        |

| Part B: Questions  |
|--|
| 1. Have the partners, agent, or sole proprietor satisfied the responsible beverage server training requirement for this license period? Submit a copy of Responsible Beverage Server Training Course Certificate. .... <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No   |
| 2. Does the applicant business or its partners, officers, directors, managing members, or agent hold a direct or indirect interest in any alcohol beverage wholesaler or producer (e.g., brewer, brewpub, winery, distillery)? . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>If yes, please explain using the space below. Attach additional sheets if necessary. |

# Schedule for Appointment of Agent by Corporation / Nonprofit Organization or Limited Liability Company

Submit to municipal clerk.

All corporations/organizations or limited liability companies applying for a license to sell fermented malt beverages and/or intoxicating liquor must appoint an agent. The following questions must be answered by the agent. The appointment must be signed by an officer of the corporation/organization or one member/manager of a limited liability company and the recommendation made by the proper local official.

To the governing body of:  Town  Village  City of Waterloo County of Jefferson

The undersigned duly authorized officer/member/manager of Handyspot 102, LLC  
(Registered Name of Corporation / Organization or Limited Liability Company)

a corporation/organization or limited liability company making application for an alcohol beverage license for a premises known as BP gas station  
(Trade Name)

located at 300 W Madison Street Waterloo, WI 53594

appoints Natalya I Hougan  
(Name of Appointed Agent)  
2278 Center Ave Stoughton WI 53589  
(Home Address of Appointed Agent)

to act for the corporation/organization/limited liability company with full authority and control of the premises and of all business relative to alcohol beverages conducted therein. Is applicant agent presently acting in that capacity or requesting approval for any corporation/organization/limited liability company having or applying for a beer and/or liquor license for any other location in Wisconsin?

Yes  No If so, indicate the corporate name(s)/limited liability company(ies) and municipality(ies).

Is applicant agent subject to completion of the responsible beverage server training course?  Yes  No

How long immediately prior to making this application has the applicant agent resided continuously in Wisconsin? 33 years

Place of residence last year \_\_\_\_\_

For: \_\_\_\_\_  
(Name of Corporation / Organization / Limited Liability Company)

By: \_\_\_\_\_  
(Signature of Officer / Member / Manager)

Any person who knowingly provides materially false information in an application for a license may be required to forfeit not more than \$1,000.

### ACCEPTANCE BY AGENT

I, Natalya I Hougan, hereby accept this appointment as agent for the  
(Print / Type Agent's Name)

corporation/organization/limited liability company and assume full responsibility for the conduct of all business relative to alcohol beverages conducted on the premises for the corporation/organization/limited liability company.

Natalya I Hougan 06-27-2023 Agent's age 37  
(Signature of Agent) (Date)

\_\_\_\_\_ Date of birth 06-24-1986  
(Home Address of Agent)

### APPROVAL OF AGENT BY MUNICIPAL AUTHORITY (Clerk cannot sign on behalf of Municipal Official)

I hereby certify that I have checked municipal and state criminal records. To the best of my knowledge, with the available information, the character, record and reputation are satisfactory and I have no objection to the agent appointed.

Approved on \_\_\_\_\_ by \_\_\_\_\_ Title \_\_\_\_\_  
(Date) (Signature of Proper Local Official) (Town Chair, Village President, Police Chief)

**Part C: For Corporate/LLC Applicants Only**

|  |  |
|--|--|
| 1. State of Registration<br><b>WISCONSIN</b> | 2. Date of Registration<br><b>04/28/2023</b> |
|--|--|

3. Is the applicant business owned by another corporation or LLC? If yes, please provide the name and FEIN of the parent company below, include parent company members in Part D, and attach Form AT-103 for all of the parent company's principal members, managers, officers, or directors .....  Yes  No

|                        |                        |
|------------------------|------------------------|
| Name of Parent Company | FEIN of Parent Company |
|------------------------|------------------------|

4. Does the parent company or any of its officers, directors, managing members, or agent hold any direct or indirect interest in any other alcohol beverage wholesaler or producer (e.g., brewer, brewpub, winery, distillery)?  Yes  No  
If yes, please explain using the space below. Attach additional sheets if necessary.

|                                       |  |       |
|---------------------------------------|--|-------|
| 5. Agent's Last Name<br><b>GHOTRA</b> | Agent's First Name<br><b>PARMINDER SINGH</b> | Phone |
|---------------------------------------|--|-------|

**Part D: Individual Information**

A Supplemental Questionnaire, Form AT-103, must be completed and attached to this application for each person involved in the applicant business and any parent company as indicated in Part C. Persons in the applicant business include: sole proprietor, all officers, directors, and agent of a corporation or nonprofit organization, all partners of a partnership, and all managing members and agent of a limited liability company.


List the full name, title, and phone number for each person below. Attach additional sheets if necessary.

| Last Name | First Name | Title | Phone |
|-----------|------------|-------|-------|
|           |            |       |       |
|           |            |       |       |
|           |            |       |       |
|           |            |       |       |

**Part E: Attestation**

Who must sign this application?  
 sole proprietor       one general partner of a partnership       one corporate officer       one managing member of an LLC

**READ CAREFULLY BEFORE SIGNING:** Under penalty of law, I have answered each of the above questions completely and truthfully. I agree that I am acting solely on behalf of the applicant business and not on behalf of any other individual or entity seeking the license. Further, I agree that the rights and responsibilities conferred by the license(s), if granted, will not be assigned to another individual or entity. I agree to operate this business according to the law, including but not limited to, purchasing alcohol beverages from state authorized wholesalers. I understand that lack of access to any portion of a licensed premises during inspection will be deemed a refusal to allow inspection. Such refusal is a misdemeanor and grounds for revocation of this license. I understand that any license issued contrary to Wis. Stat. Chapter 125 shall be void under penalty of state law. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000 if convicted.

|  |                           |
|--|---------------------------|
| Signature<br> | Date<br><b>06/27/2023</b> |
|--|---------------------------|

Name (Last, First, M.I.)  
**SINGH HARVINDER**

|                         |  |                            |
|-------------------------|--|----------------------------|
| Title<br><b>PARTNER</b> | Email<br><b>MANDYSPOTLLC@gmail.com</b> | Phone<br><b>2696053005</b> |
|-------------------------|--|----------------------------|

**Part F: For Clerk Use Only**

|                                       |                                 |   |
|---------------------------------------|---------------------------------|---|
| Date application was filed with clerk | Date reported to governing body | Date provisional license issued (if applicable) |
| Date license granted                  | License number                  | Date license issued                             |
| Signature of Clerk/Deputy Clerk       |                                 |   |



WISCONSIN DEPARTMENT OF REVENUE  
PO BOX 8902  
MADISON, WI 53708-8902

**Contact Information:**

2135 RIMROCK RD PO BOX 8902  
MADISON, WI 53708-8902  
ph: 608-266-2776 fax: 608-224-5761  
email: DORBusinessTax@wisconsin.gov  
website: revenue.wi.gov

Letter ID L1095609296

HANDYSPOT HOLDINGS LLC  
206 W MADISON ST  
LAKE MILLS WI 53551-1131

## Wisconsin Department of Revenue Seller's Permit

**Legal/real name:** HANDYSPOT HOLDINGS LLC  
**Business name:** HANDYSPOT 102 LLC  
300 W MADISON ST  
WATERLOO WI 53594-1323

- This certificate confirms you are registered with the Wisconsin Department of Revenue and authorized in the business of selling tangible personal property and taxable services.
- You may not transfer this permit.
- This permit must be displayed at the place of business and is not valid at any other location.
- If your business is not operated from a fixed location, you must carry or display this permit at all events.

| <b>Tax Type</b> | <b>Account Type</b> | <b>Account Number</b> |
|-----------------|---------------------|-----------------------|
| Sales & Use Tax | Seller's Permit     | 456-1031414471-04     |

# Application for Cigarette and Tobacco Products Retail License

Submit to municipal clerk.

MUNICIPAL USE ONLY

|                  |
|------------------|
| License Number   |
| Period Covered   |
| Date of Issuance |

Applicant's Wisconsin 15-digit Sales Tax Account Number  
456-1031447389-04

← This must be issued in the same Legal Name of the licensee below.

|   |             |  |                     |
|---|-------------|--|---------------------|
| Legal Name (corporation, limited liability company, partnership or sole proprietorship)<br>HANDYSPOT 102, LLC |             | Federal Employer Identification No. (FEIN)<br>93-1409343   |                     |
| Trade or Business Name (if different than Legal Name)   |             | Telephone Number<br>(269) 605-3005   |                     |
| Business Address (License Location)<br>300 W. MADISON STREET  |             | Business Located In<br><input checked="" type="checkbox"/> City <input type="checkbox"/> Village <input type="checkbox"/> Town |                     |
| Municipality<br>WATERLOO  | State<br>WI | Zip Code<br>53594  | County<br>JEFFERSON |
| Mailing Address (if different than Business Address)<br>2144 WINTERS WAY                                      |             | Municipality<br>ST. JOSEPH   | State<br>MI         |
|   |             | Zip Code<br>49085  |                     |

Organization (check one)

- Sole Proprietor       Wisconsin Corporation – Enter date incorporated: \_\_\_\_\_  
 Partnership       Out-of-State Corporation – Are you registered to do business in Wisconsin?     Yes     No  
 Other (describe) WI LLC ORGANIZED 4/28/23

- Yes     No    1. Does the applicant understand that they must purchase cigarettes and tobacco products only from distributors, jobbers, or subjobbers, who hold a permit with the Wisconsin Department of Revenue?
- Yes     No    2. Does the applicant understand that they must obtain a Tobacco Products Distributor permit if purchasing untaxed tobacco products from an out-of-state company? (Tobacco Products Distributor permit is available from the Wisconsin Department of Revenue at 608-266-6701. See application form CTP-129, [revenue.wi.gov/dor/forms/ctp-129.pdf](http://revenue.wi.gov/dor/forms/ctp-129.pdf).)
- Yes     No    3. Does the applicant understand that they cannot purchase/exchange cigarettes or tobacco products from another retailer, including transferring existing stock to a new owner?
- Yes     No    4. Does the applicant understand that they must provide employees with tobacco sales training approved by the Wisconsin Department of Health Services? (<https://witobaccocheck.org>)
- Yes     No    5. Does the applicant understand that they may not sell, give or otherwise provide cigarettes/tobacco products and nicotine products to minors (including electronic cigarettes containing nicotine)?
- Yes     No    6. Does the applicant understand that they may not sell single cigarettes?
- Yes     No    7. Does the applicant understand that cigarette and tobacco products invoices must be kept on the licensed premises for two years from the date of the invoice and be available for inspection by the Wisconsin Department of Revenue/law enforcement and that failure to comply can result in criminal penalties, including loss of cigarettes/tobacco products?
- Yes     No    8. Does the applicant understand that only cigarettes and roll-your-own (RYO) tobacco products listed on the Wisconsin Department of Justice's website labeled "Directory of Certified Tobacco Manufacturers and Brands" at [www.doj.state.wi.us/dls/tobacco-directory](http://www.doj.state.wi.us/dls/tobacco-directory) may be sold in Wisconsin?

Cigarettes / Tobacco will be sold     over counter     through vending machine     both

**READ CAREFULLY BEFORE SIGNING:** Under penalty provided by law, the applicant states that each of the above questions has been truthfully answered to the best of the knowledge of the applicant. Applicant agrees to operate this business according to law and that the rights and responsibilities conferred by the license(s), if granted, cannot be assigned to another. Any lack of access to any portion of a licensed premises during inspection will be deemed a refusal to permit inspection. Such refusal is a misdemeanor and grounds for revocation of this license. Any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000.

Harvinder Singh  
Harvinder Singh  
(Officer of Corporation / Member / Manager of Limited Liability Company / Partner / Individual)

### Applicable Laws and Rules

This document provides statements or interpretations of the following laws and regulations in effect as of September 19, 2019: Sections 134.65, 134.66, 139.321, 139.79, 139.76, 995.10, and 995.12, Wis. Stats.





136 North Monroe Street  
Waterloo, WI 53594-1198  
Phone: (920) 478-3025  
Fax: (920) 478-2021  
[www.waterloowi.us](http://www.waterloowi.us)

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**RESOLUTION #2023-24**

**Awarding A Contract For 2023 Pavement Maintenance**

**Whereas**, this contract for pavement maintenance is funded from the 2023 Capital Project Fund, and;

**Whereas**, the public bids were advertised and opened on June 16, 2023 by Senior Design Engineer Jackie Kohn-Born. Mitch Leisses, City Engineer has forwarded the attached recommendation letter and bid tabulation.

**Whereas**, in addition to the base bid for Canal Road alternate bids were sought. Alternate 1 includes Porter St, Alternate 2 includes Mill St. and Cleveland St. and Alternate 3 includes Edison St. and Franklin St.

**Now Therefore Be It Resolved**, by the Common Council of the City of Waterloo, Wisconsin, that it awards a contract for the work described above to Thunder Road LLC from Genesee, Wisconsin. With a base bid in the amount of \$50,955.00 with an Alternate 1 in the amount of \$2,685.00, \$2505.00 for Alternate 2 and \$2300.00 for Alternate 3. This project is set to begin in the Summer of 2023.

**PASSED AND ADOPTED ON** this 20th day of July 2023.

**City of Waterloo**

Signed: \_\_\_\_\_  
Jenifer Quimby  
Mayor

Attest:

\_\_\_\_\_  
Jeanne Ritter  
Clerk/Deputy Treasurer



107 PARALLEL STREET  
BEAVER DAM, WI 53916

1115 S MAIN STREET  
WEST BEND, WI 53095

920-356-9447  
FAX 920-356-9454  
KUNKELENGINEERING.COM

June 19, 2023

Jenifer Quimby, Mayor  
City of Waterloo  
136 North Monroe Street  
Waterloo, WI 53594

**Re: 2023 Pavement Maintenance Program  
Construction Contract Award Recommendation**

Dear Mayor Quimby:

Please find accompanying this transmittal the Bid Tabulation for the 2023 Pavement Maintenance Program that was bid on June 16, 2023. As is evident, Thunder Road, LLC from Genesee, Wisconsin submitted the low bid in the amount of \$50,955.00 for the base bid, \$2,685.00 for Alternate 1, \$2,505.00 for Alternate 2, and \$2,300.00 for Alternate 3. Two competitive bids were received all less than the Engineers Estimate.

Based upon our analysis and our understanding of the Contractor's past work efforts, we heretofore recommend that a construction contract be awarded to Thunder Road, LLC from Genesee, Wisconsin for 2023 Pavement Maintenance Program in the amount of \$50,955.00 for the base bid, \$2,685.00 for Alternate 1, \$2,505.00 for Alternate 2, and \$2,300.00 for Alternate 3, with the project schedule to begin in the summer of 2023.

Mayor, should either you or the City Council have any questions or comments regarding this transmittal, please contact me at your convenience.

Sincerely,

**KUNKEL ENGINEERING GROUP**

Mitchell Leisses  
Office/Project Manager

Enclosure

cc: Chad Yerges, Director of Public Works



**BID TABULATION**  
**City of Waterloo**  
**2023 Pavement Maintenance Program**  
**10:00 AM Friday, June 16, 2023**

| Item No.              | Base Bid Canal Road                              | Quantity | Unit | Thunder Road, LLC<br>Genesee, WI |                     | Fahrner Asphalt Sealers, LLC<br>Waunakee, WI |                     |
|-----------------------|--|----------|------|----------------------------------|---------------------|--|---------------------|
|                       |  |          |      | Unit Price                       | Total               | Unit Price                                   | Total               |
| 1                     | Crack Sealing                                    | 1        | LS   | \$ 3,650.00                      | \$ 3,650.00         | \$ 3,000.00                                  | \$ 3,000.00         |
| 2                     | Single Seal Coat                                 | 11,000   | SY   | \$ 3.18                          | \$ 34,980.00        | \$ 3.26                                      | \$ 35,860.00        |
| 3                     | Epoxy Pavement Markings, 6-Inch                  | 1,100    | LF   | \$ 3.00                          | \$ 3,300.00         | \$ 3.00                                      | \$ 3,300.00         |
| 4                     | Epoxy Pavement Markings, 8-Inch                  | 80       | LF   | \$ 10.00                         | \$ 800.00           | \$ 10.00                                     | \$ 800.00           |
| 5                     | Epoxy Pavement Markings, 12-Inch                 | 25       | LF   | \$ 15.00                         | \$ 375.00           | \$ 15.00                                     | \$ 375.00           |
| 6                     | Epoxy Pavement Markings, Shared Bike Lane Symbol | 25       | EA   | \$ 250.00                        | \$ 6,250.00         | \$ 250.00                                    | \$ 6,250.00         |
| 7                     | Erosion Control                                  | 1        | LS   | \$ -                             | \$ -                | \$ -   | \$ -                |
| 8                     | Traffic Control and Access                       | 1        | LS   | \$ 1,600.00                      | \$ 1,600.00         | \$ 3,000.00                                  | \$ 3,000.00         |
| <b>TOTAL BASE BID</b> |  |          |      |                                  | <b>\$ 50,955.00</b> |  | <b>\$ 52,585.00</b> |

| Item No.           | Alt 1 Porter Street Crack Sealing | Quantity | Unit | Unit Price  | Total              | Unit Price  | Total              |
|--------------------|-----------------------------------|----------|------|-------------|--------------------|-------------|--------------------|
| 9                  | Porter Street                     | 1        | LS   | \$ 2,635.00 | \$ 2,635.00        | \$ 4,000.00 | \$ 4,000.00        |
| 10                 | Erosion Control                   | 1        | LS   | \$ -        | \$ -               | \$ -        | \$ -               |
| 11                 | Traffic Control and Access        | 1        | LS   | \$ 50.00    | \$ 50.00           | \$ 455.00   | \$ 455.00          |
| <b>TOTAL ALT 1</b> |                                   |          |      |             | <b>\$ 2,685.00</b> |             | <b>\$ 4,455.00</b> |

| Item No.           | Alt 2 Mill and Cleveland Streets Crack Sealing | Quantity | Unit | Unit Price  | Total              | Unit Price  | Total              |
|--------------------|--|----------|------|-------------|--------------------|-------------|--------------------|
| 12                 | Mill Street                                    | 1        | LS   | \$ 1,255.00 | \$ 1,255.00        | \$ 2,000.00 | \$ 2,000.00        |
| 13                 | Cleveland Street                               | 1        | LS   | \$ 1,200.00 | \$ 1,200.00        | \$ 2,000.00 | \$ 2,000.00        |
| 14                 | Erosion Control                                | 1        | LS   | \$ -        | \$ -               | \$ -        | \$ -               |
| 15                 | Traffic Control and Access                     | 1        | LS   | \$ 50.00    | \$ 50.00           | \$ 200.00   | \$ 200.00          |
| <b>TOTAL ALT 2</b> |  |          |      |             | <b>\$ 2,505.00</b> |             | <b>\$ 4,200.00</b> |

| Item No.           | Alt 3 Edison and Franklin Streets Crack Sealing | Quantity | Unit | Unit Price  | Total              | Unit Price  | Total              |
|--------------------|---|----------|------|-------------|--------------------|-------------|--------------------|
| 16                 | Edison Street                                   | 1        | LS   | \$ 1,800.00 | \$ 1,800.00        | \$ 2,000.00 | \$ 2,000.00        |
| 17                 | Franklin Street                                 | 1        | LS   | \$ 450.00   | \$ 450.00          | \$ 600.00   | \$ 600.00          |
| 18                 | Erosion Control                                 | 1        | LS   | \$ -        | \$ -               | \$ -        | \$ -               |
| 19                 | Traffic Control and Access                      | 1        | LS   | \$ 50.00    | \$ 50.00           | \$ 250.00   | \$ 250.00          |
| <b>TOTAL ALT 3</b> |   |          |      |             | <b>\$ 2,300.00</b> |             | <b>\$ 2,850.00</b> |



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Phone: (920) 478-3025  
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## Council Vacancy Application

Form 30-8

(Provide requested information on a separate sheet if space on this form is not sufficient)

The Common Council shall review the applications and allow for opportunities for public candidate interviews. Candidates shall have 30 days to submit an application once a vacancy is announced. The review period shall not exceed 60 days. If the Common Council is unable to agree on a replacement to fill the vacancy it may reopen the application process to seek additional candidates. The Common Council shall appoint and confirm from among the applicants. The appointed and confirmed candidate shall serve until an alderperson is elected pursuant to 17.23(1) Wis. Stats.

Completed applications should be directed to the Clerk's office (*in-person*; email: [cityhall@waterloowi.us](mailto:cityhall@waterloowi.us); fax: 920-478-2021)

ONLINE LINK: [What Waterloo wards and streets make up this Aldermanic District?](#)

Applying For: Alderman Ward 4-5

Applicant: Jodie Haseley Address: 332 S Washington ST

Phone: 920 988 3233 Email: haseleyj@ gmail.com

Provide a statement on why the applicant wishes to serve? Acting as an Alderman

would provide an opportunity for me to engage & serve the people of Waterloo. Our city is a unique place to live, raise a family & offers unlimited...

Provide a statement on what the applicant wants to accomplish? I want to ensure

Ward 4-5 continues to be represented & has a voice as Waterloo grows.

Does the applicant plan to run for office during the next special or regular election? open to discuss.

Applicant signature: Jodie Haseley

Date: 11-19-2023

• • • growth to new business ventures.

# Waterloo City Council - Annual Calendar Announcements & Recognition

Meeting nights: 1<sup>st</sup> & 3<sup>rd</sup> Thursdays at 7:00 pm

|  |
|--|
| JANUARY  |
| FEBRUARY<br>- Audit Prep   |
| MARCH<br>- Waterloo incorporated March 19, 1859 (Village status)   |
| APRIL<br>- Anniversary April 11, 1962 (City status)<br>- National Library Week (generally 2 <sup>nd</sup> full week in April) 1 <sup>st</sup> mtg<br>- National Linework Day 18 <sup>th</sup> 1 <sup>st</sup> mtg<br>- Annual Organizational Mtg & Appointments - 2 <sup>nd</sup> mtg after regular election<br>- Audit Presentation 2 <sup>nd</sup> mtg<br>- National Parks Week (3 <sup>rd</sup> Saturday start) 2 <sup>nd</sup> mtg |
| MAY<br>- National Firefighters Day (always May 4 <sup>th</sup> ) 1 <sup>st</sup> mtg<br>- National Police Week (w/o May 15 <sup>th</sup> ) 1 <sup>st</sup> mtg<br>- National EMS Week (3 <sup>rd</sup> full week of May Sat-Sun) 2 <sup>nd</sup> mtg<br>- National Public Works Day (3 <sup>rd</sup> full week of May) 2 <sup>nd</sup> mtg   |
| JUNE   |
| JULY<br>- Budget Kick off  |
| AUGUST   |
| SEPTEMBER<br>- Annual Wheel Tax Ordinance – 1 <sup>st</sup> mtg  |
| OCTOBER<br>- National Government Week (2 <sup>nd</sup> week)   |
| NOVEMBER<br>- Budget public hearing and consideration of a Finance, Insurance & Personnel Committee budget recommendation  |
| DECEMBER   |

## ONLINE LINKS

- [Municipal Code Chapter 30 -- CITY COUNCIL](#)
- [2021-2026 Comprehensive Plan Update](#)