

CITY OF PRESCOTT, WISCONSIN  
MEETING NOTICE  
REGULAR CITY COUNCIL MEETING  
MONDAY, SEPTEMBER 26, 2016 AT 6:30 P.M.  
PRESCOTT MUNICIPAL BUILDING, 800 BORNER STREET  
PRESCOTT, WI 54021  
WEBSITE: PRESCOTTWI.ORG

AGENDA

1. CALL TO ORDER
2. ROLL CALL
3. PLEDGE OF ALLEGIANCE
4. PUBLIC COMMENTS – THE CITY COUNCIL WILL RECEIVE PUBLIC COMMENTS ON ANY ISSUE(S) NOT RELATED TO AGENDA ITEMS. LIMITED DISCUSSION BY THE CITY COUNCIL MAY TAKE PLACE, HOWEVER NO ACTION WILL BE TAKEN ON ANY ITEMS. THIS INCLUDES RECEIVING WRITTEN REQUESTS OR DOCUMENTATION AND POSSIBLE ACTION AT A FUTURE COUNCIL MEETING
5. CONSENT AGENDA
  1. SEPTEMBER 12, 2016 REGULAR CITY COUNCIL MEETING MINUTES
  2. AUGUST 10, 2016 PRESCOTT HOUSING AUTHORITY MEETING MINUTES
6. REPORTS OF STANDING COMMITTEES
  - A. PUBLIC WORKS
  - B. FINANCE COMMITTEE
  - C. LICENSE
    1. CLASS “A” BEER AND CLASS “A” LIQUOR LICENSE REQUEST FROM DOLGENCORP, LLC DBA AS DOLLAR GENERAL STORE 16734, 1041 ORRIN RD
    2. OPERATOR LICENSES
  - D. PARKS & PUBLIC PROPERTY
  - E. PUBLIC SAFETY
  - F. ORDINANCE
  - G. PERSONNEL
  - H. HEALTH & SAFETY
  - I. PLANNING COMMISSION
  - J. COMMUNICATIONS & NEW BUSINESS
    1. PUBLIC COMMENTS
    2. WISCONSIN TAXPAYER ALLIANCE
    3. “TURNOUT FOR TRANSPORTATION” MEETING SEPTEMBER 29, 2016 AT 7:00 P.M. AT PIERCE COUNTY HIGHWAY DEPARTMENT BUILDING, 621 CAIRNS ST, ELLSWORTH
    4. OTHER BUSINESS
    5. ADJOURNMENT

NOTICE

ACCESS TO THE MUNICIPAL BUILDING FOR THE DISABLED IS AVAILABLE THROUGH THE REAR PARKING LOT ENTRANCE. ALL THOSE WITH SPECIAL NEEDS SHOULD CALL CITY HALL OFFICES (715-262-5544) IF ASSISTANCE IS NEEDED

SEPTEMBER 12, 2016 REGULAR CITY COUNCIL MEETING MINUTES

Pursuant to due call and notice thereof, a regular meeting of the Prescott City Council was held on Monday, September 12, 2016 in the Prescott Municipal Building, 800 Borner St., Prescott, WI 54021.

Call to order/Roll Call: Mayor David Hovel called the meeting to order at 6:30 p.m. Members present were Jack Hoschette, Rob Daugherty, Joshua Gergen, Bill Dravis and Maureen Otwell. Galen Seipel was excused. City Administrator Jayne Brand represented staff. Also present Russ Kivienmi, City Engineer from Cedar Corporation.

Pledge of Allegiance was said.

**Public Comments: None were given.**

**Daugherty/Gergen motion to approve the consent agenda which included August 22, 2016 regular city council meeting minutes, August 22, 2016 parks and public property committee meeting minutes, July 21, 2016 Prescott public library board of trustee meeting minutes, cash balance, budget year to date, accounts payable, payroll and review of receivables passed without a negative voice vote.**

**Daugherty/Gergen motion to open public hearing for vacation of all that part of a certain alley located in Block 1, Rodney Johnson's Addition in the City of Prescott, County of Pierce, Wisconsin passed without a negative voice vote.**

Joe Ptacek stated at the last meeting he was in agreement of the alley being vacated but he would like to have the Council wait on the vacation until they can contact a real estate attorney. He stated his granddaughter purchased the property in good faith not knowing there were issues with the property. Joe stated they have contacted the title insurance company but they have exclusions for a number of issues. Randy Hendrickson stated he would like to move forward with the vacation as he would like to sell his property. Hendrickson stated he had contacted the listing agent about there being a possible issue with the property but he didn't have the survey completed yet. Hendrickson stated the listing agent told him it wasn't his problem he was hired to sell the property. Hendrickson stated now is the time to get a resolution to these issues as he wants to have a clean title when he sells his property. Trinity Eastman, 610 James Street stated according to the survey they have the alley runs through their house and questioned if the survey was correct. Mayor Hovel stated the surveyor is a certified surveyor and so the survey he completed should be a qualified survey. Eastman questioned what was going to happen with the survey going through her house. Randy Hendrickson assured everyone he was not going to go out and block off the alley. He is willing to work with them and would possibly sell them a portion of the property as long as it did not create a substandard lot for him. Alderperson Gergen stated it still did really matter when the alley was going to be vacated if it was before or after their discussions with a real estate attorney it would still need to be done.

**Gergen/Daugherty motion to close the public hearing passed without a negative voice vote.**

**Daugherty/Gergen motion to approve Resolution vacating all that part of the alley located in Block 1, Rodney Johnson's Addition to the City of Prescott, Pierce County, Wisconsin passed without a negative voice vote.**

**Daugherty/Otwell motion to approve assessing services with Accurate Appraisal for 3 years of regular maintenance and 1 year of market revaluation at the cost of \$10,000 per year starting in 2017 passed without a negative voice vote.**

**Gergen/Dravis motion to approve final pay request in the amount of \$7,596.56 to TJ's Excavating & Process Works for the south lift station rehab passed without a negative voice vote.**

**Gergen/Otwell motion to approve final pay request in the amount of \$22,974.82 to McCabe Construction for Court and Laura Streets passed without a negative voice vote.**

**Gergen/Otwell motion to deny insurance claim from Erickson Marine for claim dated 4/11/16 passed without a negative voice vote.**

The Council was informed the city did not receive the grant for the underpasses for US Highway 10. The city can rewrite the grant in 2017.

**Otwell/Daugherty motion to approve marina lease with Richard Anderson DBA Leo's Landing passed without a negative voice vote.**

**Daugherty/Dravis motion to approve Farm land lease for City's compost site land with Gerald and Jeffrey Kosin passed without a negative voice vote.**

**Otwell/Dravis motion to approve Resolution 07-16 "#JustFixITWI Transportation Funding " and forward a copy to the Governor's Office passed without a negative voice vote.**

**Gergen/Otwell motion to approve non-renewal of Code Red Emergency Notification System as of December 31, 2106 passed without a negative voice vote.**

**Public Comments:** The Mayor and Council thanked the Prescott Daze Committee for a successful Prescott Daze.

**Gergen/Daugherty motion to go into closed session per Wisconsin Stats. 19.85 (1) (e) deliberating or negotiating the purchasing of public property, the investing of public funds, or conducting other specified public business whenever competitive or bargaining reasons require a closed session – possible land purchase in TIF #4 passed unanimously via roll call vote.**

**Daugherty/Gergen motion to come out of closed session passed unanimously via roll call vote.**

**Hoschette/Daugherty motion to adjourn passed without a negative voice vote.**

Respectfully Submitted,

Jayne M. Brand  
City Administrator

Minutes of the regularly scheduled meeting of the Board of Commissioners of the Prescott Housing Authority on August 10,2016. Chairperson David Sterud called the meeting to order at 9:00 A.M.

Roll called showed those present to be Brenda Haas, Rich Matzek, and David Sterud.

Absent: Gary Dunn,Dorothea Morris

Also present Anne McAlpine, Management Agent.

Minutes from the July 13,2016 meeting were approved. Matzek/Haas

Financial Reports from July 31,2016 were discussed and approved. Matzek/Haas  
There will be a year end financial audit on 8/19/2016.

Approval of checks for August, 2016. Haas/Matzek

No Tenants were present.

#### Old Business

1. Received a grant of \$2400 for the new picnic shelter, from the Prescott Foundation.
2. There are still other Grant Applications outstanding. We hope to hear back on those in the next month.
3. McAlpine to check with Plummer Concrete on a date for completion of the slab for the new covered picnic shelter.
4. The target date for construction of the covered picnic shelter by the Lions Club is October 2016.

#### New Business

McAlpine presented copies of "House Rules" and "Tenant Code of Conduct". There are a few changes that were discussed, but it was decided that some further investigation is needed before anything is updated on these documents.

#### No Chair Report

#### Management Report

Vacancy report – Two tenants will be moving out by August 31,2016. There is no one on the waiting list to occupy these vacancies.

There being no other business, motion to adjourn at 9:35 Matzek/Haas.

Respectfully submitted Rich Matzek, Recorder

# ORIGINAL ALCOHOL BEVERAGE RETAIL LICENSE APPLICATION

Submit to municipal clerk.

For the license period beginning JULY 1 20 16 ;  
ending JUNE 30 20 17

TO THE GOVERNING BODY of the:  Town of }  
 Village of } PRESCOTT  
 City of }

County of PIERCE Aldermanic Dist. No. \_\_\_\_\_ (if required by ordinance)

Applicant's WI Seller's Permit No.: FEIN Number:	
LICENSE REQUESTED ▶	
TYPE	FEE
<input checked="" type="checkbox"/> Class A beer	\$
<input checked="" type="checkbox"/> Class B beer	\$ <u>100</u>
<input type="checkbox"/> Class C wine	\$
<input checked="" type="checkbox"/> Class A liquor	\$ <u>500.00</u>
<input type="checkbox"/> Class A liquor (cider only)	\$ N/A
<input type="checkbox"/> Class B liquor	\$
<input type="checkbox"/> Reserve Class B liquor	\$
<input type="checkbox"/> Class B (wine only) winery	\$
Publication fee	\$ <u>10.00</u>
<b>TOTAL FEE</b>	\$ <u>260.00</u>

1. The named  INDIVIDUAL  PARTNERSHIP  LIMITED LIABILITY COMPANY  
 CORPORATION/NONPROFIT ORGANIZATION

hereby makes application for the alcohol beverage license(s) checked above.

2. Name (individual/partners give last name, first, middle; corporations/limited liability companies give registered name): ▶ DOLGENCORP, LLC

An "Auxiliary Questionnaire," Form AT-103, must be completed and attached to this application by each individual applicant, by each member of a partnership, and by each officer, director and agent of a corporation or nonprofit organization, and by each member/manager and agent of a limited liability company. List the name, title, and place of residence of each person.

Title	Name	Home Address	Post Office & Zip Code
President/Member	LAWRENCE JOSEPH GATTA	SEE ATTACHED	
Vice President/Member	JAMES WILLIAM THORPE	SEE ATTACHED	
Secretary/Member			
Treasurer/Member			
Agent	<u>▶ Cheryl Schilling, 1041 Orrin Rd, Prescott, WI 54021</u>		
Directors/Managers			

3. Trade Name ▶ DOLLAR GENERAL STORE 16734 Business Phone Number tbd

4. Address of Premises ▶ 1041 ORRIN RD Post Office & Zip Code ▶ PRESCOTT, 54021

5. Is individual, partners or agent of corporation/limited liability company subject to completion of the responsible beverage server training course for this license period?  Yes  No
6. Is the applicant an employe or agent of, or acting on behalf of anyone except the named applicant?  Yes  No
7. Does any other alcohol beverage retail licensee or wholesale permittee have any interest in or control of this business?  Yes  No
8. (a) **Corporate/limited liability company applicants only:** Insert state KENTUCKY and date 10/09/08 of registration.  
(b) Is applicant corporation/limited liability company a subsidiary of any other corporation or limited liability company?  Yes  No  
(c) Does the corporation, or any officer, director, stockholder or agent or limited liability company, or any member/manager or agent hold any interest in any other alcohol beverage license or permit in Wisconsin?  Yes  No
- (NOTE: All applicants explain fully on reverse side of this form every YES answer in sections 5, 6, 7 and 8 above.)

9. Premises description: Describe building or buildings where alcohol beverages are to be sold and stored. The applicant must include 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.) 8300 SQ FT STAND ALONE STORE

10. Legal description (omit if street address is given above): \_\_\_\_\_
11. (a) Was this premises licensed for the sale of liquor or beer during the past license year?  Yes  No  
(b) If yes, under what name was license issued? \_\_\_\_\_
12. Does the applicant understand they must file a Special Occupational Tax return (TTB form 5630.5) before beginning business? [phone 1-800-937-8864]  Yes  No
13. Does the applicant understand they must hold a Wisconsin Seller's Permit? [phone (608) 266-2776].  Yes  No
14. Does the applicant understand that they must purchase alcohol beverages only from Wisconsin wholesalers, breweries and brewpubs?  Yes  No

**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 signers. Signers agree to operate this business according to law and that the rights and responsibilities conferred by the license(s), if granted, will not be assigned to another. (Individual applicants and each member of a partnership applicant must sign; corporate officer(s), members/managers of Limited Liability Companies must sign.) 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.

### SUBSCRIBED AND SWORN TO BEFORE ME

this 12th day of May 2016  
Kathy L. Schetter (Clerk/Notary Public)  
James W. Thorpe (Officer of Corporation/Member/Manager of Limited Liability Company/Partner/Individual)  
James W. Thorpe (Officer of Corporation/Member/Manager of Limited Liability Company/Partner)

My commission expires 12-17-16  
\_\_\_\_\_ (Additional Partner(s)/Member/Manager of Limited Liability Company if Any)

### TO BE COMPLETED BY CLERK

Date received and filed with municipal clerk	Date reported to council/board	Date provisional license issued	Signature of Clerk / Deputy Clerk
Date license granted	Date license issued	License number issued	

# AUXILIARY QUESTIONNAIRE ALCOHOL BEVERAGE LICENSE APPLICATION

16734

Submit to municipal clerk.

Individual's Full Name (please print) (last name)		(first name)		(middle name)	
GATTA		LAWRENCE		JOSEPH	
Home Address (street/route)		Post Office		City	
844 WINDSTONE BLVD				BRENTWOOD	
Home Phone Number		Age		Date of Birth	
615-855-4000		56		03/22/1960	
				State	
				TN	
				Zip Code	
				37027	
				Place of Birth	
				Niles, OH	

The above named individual provides the following information as a person who is (check one):

- Applying for an alcohol beverage license as an **individual**.
- A member of a **partnership** which is making application for an alcohol beverage license.
- Agent** of **Dolgencorp, LLC**

(Officer/Director/Member/Manager/Agent) (Name of Corporation, Limited Liability Company or Nonprofit Organization)

which is making application for an alcohol beverage license.

The above named individual provides the following information to the licensing authority:

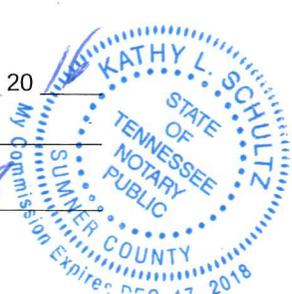
- How long have you continuously resided in Wisconsin prior to this date? \_\_\_\_\_
- Have you ever been convicted of any offenses (other than traffic unrelated to alcohol beverages) for violation of any federal laws, any Wisconsin laws, any laws of any other states or ordinances of any county or municipality?  Yes  No  
If yes, give law or ordinance violated, trial court, trial date and penalty imposed, and/or date, description and status of charges pending. (If more room is needed, continue on reverse side of this form.) \_\_\_\_\_
- Are charges for any offenses presently pending against you (other than traffic unrelated to alcohol beverages) for violation of any federal laws, any Wisconsin laws, any laws of other states or ordinances of any county or municipality?  Yes  No  
If yes, describe status of charges pending. \_\_\_\_\_
- Do you hold, are you making application for or are you an officer, director or agent of a corporation/nonprofit organization or member/manager/agent of a limited liability company holding or applying for any other alcohol beverage license or permit?  Yes  No  
If yes, identify. All applicable Dollar General Stores in Wisconsin-see attached list.  
(Name, Location and Type of License/Permit)
- Do you hold and/or are you an officer, director, stockholder, agent or employe of any person or corporation or member/manager/agent of a limited liability company holding or applying for a wholesale beer permit, brewery/winery permit or wholesale liquor, manufacturer or rectifier permit in the State of Wisconsin?  Yes  No  
If yes, identify. \_\_\_\_\_  
(Name of Wholesale Licensee or Permittee) (Address By City and County)
- Named individual must list in chronological order last two employers.

Employer's Name	Employer's Address	Employed From	To
Dollar General Corporation	100 Mission RDG, Goodlettsville, TN	02/01/2009	present
Employer's Name	Employer's Address	Employed From	To
Long's Drug Store	10 N Civic Dr., Walnut Creek, CA	09/01/2002	01/31/2009

The undersigned, being first duly sworn on oath, deposes and says that he/she is the person named in the foregoing application; that the applicant has read and made a complete answer to each question, and that the answers in each instance are true and correct. The undersigned further understands that any license issued contrary to Chapter 125 of the Wisconsin Statutes shall be void, and under penalty of state law, the applicant may be prosecuted for submitting false statements and affidavits in connection with this application.

Subscribed and sworn to before me

this 12<sup>th</sup> day of May, 2018  
Kathy L. Schultz  
(Clerk/Notary Public)



Joseph Lawrence Gatta  
(Signature of Named Individual)

My commission expires 12-17-18



16734

# AUXILIARY QUESTIONNAIRE ALCOHOL BEVERAGE LICENSE APPLICATION

Submit to municipal clerk.

Individual's Full Name (please print) (last name)		(first name)		(middle name)	
THORPE		JAMES		WILLIAM	
Home Address (street/route)		Post Office		City	
1220 CHLOE DRIVE				GALLATIN	
Home Phone Number		Age		Date of Birth	
615-855-4000		57		01/30/1959	
				State	
				TN	
				Zip Code	
				37066	
				Place of Birth	
				Falls Rivers, MA	

The above named individual provides the following information as a person who is (check one):

- Applying for an alcohol beverage license as an **individual**.
- A member of a **partnership** which is making application for an alcohol beverage license.
- Agent** of Dolgencorp, LLC

(Officer/Director/Member/Manager/Agent) (Name of Corporation, Limited Liability Company or Nonprofit Organization)

which is making application for an alcohol beverage license.

The above named individual provides the following information to the licensing authority:

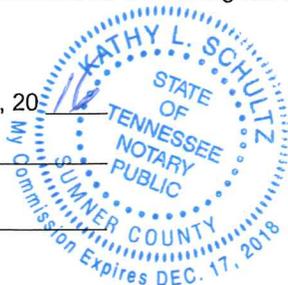
- How long have you continuously resided in Wisconsin prior to this date? \_\_\_\_\_
- Have you ever been convicted of any offenses (other than traffic unrelated to alcohol beverages) for violation of any federal laws, any Wisconsin laws, any laws of any other states or ordinances of any county or municipality?  Yes  No  
If yes, give law or ordinance violated, trial court, trial date and penalty imposed, and/or date, description and status of charges pending. (If more room is needed, continue on reverse side of this form.) \_\_\_\_\_
- Are charges for any offenses presently pending against you (other than traffic unrelated to alcohol beverages) for violation of any federal laws, any Wisconsin laws, any laws of other states or ordinances of any county or municipality?  Yes  No  
If yes, describe status of charges pending. \_\_\_\_\_
- Do you hold, are you making application for or are you an officer, director or agent of a corporation/nonprofit organization or member/manager/agent of a limited liability company holding or applying for any other alcohol beverage license or permit?  Yes  No  
If yes, identify. All applicable Dollar General Stores in Wisconsin-see attached list.  
(Name, Location and Type of License/Permit)
- Do you hold and/or are you an officer, director, stockholder, agent or employe of any person or corporation or member/manager/agent of a limited liability company holding or applying for a wholesale beer permit, brewery/winery permit or wholesale liquor, manufacturer or rectifier permit in the State of Wisconsin?  Yes  No  
If yes, identify. \_\_\_\_\_  
(Name of Wholesale Licensee or Permittee) (Address By City and County)
- Named individual must list in chronological order last two employers.

Employer's Name	Employer's Address	Employed From	To
Dollar General Corporation	100 Mission Ridge, Goodlettsville, TN	8/2015	present
Dollar General Corporation	100 Mission Ridge, Goodlettsville, TN	5/2006	7/2012

The undersigned, being first duly sworn on oath, deposes and says that he/she is the person named in the foregoing application; that the applicant has read and made a complete answer to each question, and that the answers in each instance are true and correct. The undersigned further understands that any license issued contrary to Chapter 125 of the Wisconsin Statutes shall be void, and under penalty of state law, the applicant may be prosecuted for submitting false statements and affidavits in connection with this application.

Subscribed and sworn to before me

this 12th day of Nov, 2016  
Kathy L. Schultz  
(Clerk/Notary Public)



[Signature]  
(Signature of Named Individual)

My commission expires 12-17-18



Printed on Recycled Paper

16734

**DOLGENCORP, LLC**

**A manager-managed Kentucky Limited Liability Company**

(Formerly known as Dolgencorp, Inc. – converted from Corporation to LLC)

Action by Secretary's Certificate dated Sept 15, 2014 showing the below Officers

Sole Member

Dollar General Corporation

List of Managers

Larry J. Gatta  
James W. Thorpe

Manager  
Manager

**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 the officer(s) of the corporation/organization or members/managers of a limited liability company and the recommendation made by the proper local official.

To the governing body of:  Town  
 Village of PRESCOTT County of PIERCE  
 City

The undersigned duly authorized officer(s)/members/managers of Dolgencorp, 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 Dollar General Store #16734  
(trade name)

located at 1041 Orrin Rd, Prescott, WI 54021

appoints Cheryl Schilling  
(name of appointed agent)

117 Church Hill Rd, Somerset, WI 54025  
(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? 8-2010

Place of residence last year Same. 117 Church Hill Rd. Somerset, WI 54025

For: Dolgencorp, LLC  
(name of corporation/organization/limited liability company)

By: [Signature]  
(signature of Officer/Member/Manager)

And: [Signature]  
(signature of Officer/Member/Manager)

**ACCEPTANCE BY AGENT**

I, Cheryl Schilling, 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.

[Signature] 8-25-16 Agent's age 43  
(signature of agent) (date)

117 Church Hill Rd, Somerset, WI 54025 Date of birth 03/12/1973  
(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 9-21-16 by G. Kuchta Title Police Chief  
(date) (signature of proper local official) (town chair, village president, police chief)

# AUXILIARY QUESTIONNAIRE ALCOHOL BEVERAGE LICENSE APPLICATION

Submit to municipal clerk.

Individual's Full Name (please print) (last name)		(first name)		(middle name)	
SCHILLING		CHERYL		K	
Home Address (street/route)		Post Office		City	
117 CHURCH HILL RD				SOMERSET	
Home Phone Number		Age		Date of Birth	
(615) 855-4000		43		03/12/1973	
				Place of Birth	
				St. Paul, MN	

The above named individual provides the following information as a person who is (check one):

- Applying for an alcohol beverage license as an individual.
- A member of a partnership which is making application for an alcohol beverage license.
- Agent of Dolgencorp LLC  
(Officer/Director/Member/Manager/Agent) (Name of Corporation, Limited Liability Company or Nonprofit Organization)

which is making application for an alcohol beverage license.

The above named individual provides the following information to the licensing authority:

- How long have you continuously resided in Wisconsin prior to this date? 8-2010
- Have you ever been convicted of any offenses (other than traffic unrelated to alcohol beverages) for violation of any federal laws, any Wisconsin laws, any laws of any other states or ordinances of any county or municipality?  Yes  No  
If yes, give law or ordinance violated, trial court, trial date and penalty imposed, and/or date, description and status of charges pending. (If more room is needed, continue on reverse side of this form.)
- Are charges for any offenses presently pending against you (other than traffic unrelated to alcohol beverages) for violation of any federal laws, any Wisconsin laws, any laws of other states or ordinances of any county or municipality?  Yes  No  
If yes, describe status of charges pending.
- Do you hold, are you making application for or are you an officer, director or agent of a corporation/nonprofit organization or member/manager/agent of a limited liability company holding or applying for any other alcohol beverage license or permit?  Yes  No  
If yes, identify. (Name, Location and Type of License/Permit)
- Do you hold and/or are you an officer, director, stockholder, agent or employe of any person or corporation or member/manager/agent of a limited liability company holding or applying for a wholesale beer permit, brewery/winery permit or wholesale liquor, manufacturer or rectifier permit in the State of Wisconsin?  Yes  No  
If yes, identify. (Name of Wholesale Licensee or Permittee) (Address By City and County)
- Named individual must list in chronological order last two employers.

Employer's Name	Employer's Address	Employed From	To
Dollar General	100 Mission Rdg, Goodlettsville, TN	06/27/2016	—
Employer's Name	Employer's Address	Employed From	To
Cheryl Schilling	1041 Orrin Rd	6-27-16	8-25-16

The undersigned, being first duly sworn on oath, deposes and says that he/she is the person named in the foregoing application; that the applicant has read and made a complete answer to each question, and that the answers in each instance are true and correct. The undersigned further understands that any license issued contrary to Chapter 125 of the Wisconsin Statutes shall be void, and under penalty of state law, the applicant may be prosecuted for submitting false statements and affidavits in connection with this application.

Subscribed and sworn to before me

this 25th day of August, 2016

Donna M. Most  
(Clerk/Notary Public)

My commission expires 2-17-18



[Signature]  
(Signature of Named Individual)



[Signature] 9-21-16

List of LLC Applied

5866	2410 1ST CENTER AVE	BRODHEAD	GREEN	53520-1943
6413	1150 SERVICE RD	KIEL	MANITOWOC	53042-1281
6432	125 W HURON ST	OMRO	WINNEBAGO	54963-1325
6440	1011 E SPRUCE ST	ABBOTSFORD	MARATHON	54405-0618
6477	1131 MARQUETTE AVE	SOUTH MILWAUKEE	MILWAUKEE	53172-2526
6481	2241 MAIN ST STE B	GREEN BAY	BROWN	54302-3743
6482	320 N MAIN ST	RIVER FALLS	PIERCE	54022-2344
6509	991 MARQUETTE DR	KEWAUNEE	KEWAUNEE	54216-1772
6535	1320 W WISCONSIN AVE UNIT	APPLETON	OUTAGAMIE	54914-3287
6554	902 W MAIN ST	WAUPUN	FOND DU LAC	53963-1201
6563	1152 S MILITARY AVE	GREEN BAY	BROWN	54304-2145
6571	905 E DIVISION ST	WAUTOMA	WAUSHARA	54982-1035
6586	745 E FOND DU LAC ST	RIPON	FOND DU LAC	54971-9570
6587	333 PROSPECT AVE	NORTH FOND DU LAC	FOND DU LAC	54937-1466
6588	103 BRALICK WAY	OCONTO	OCONTO	54153-1978
6604	1102 LAWE ST	KAUKAUNA	OUTAGAMIE	54130-1553
6627	360 S MAIN ST	CLINTONVILLE	WAUPACA	54929-1632
6637	610 S US HIGHWAY 141	CRIVITZ	MARINETTE	54114-0250
6639	105 HENRY ST	NEW LONDON	WAUPACA	54961-7509
6775	331 E CENTER ST	JUNEAU	DODGE	53039-1311
6861	528 E LAKE ST	LAKE MILLS	JEFFERSON	53551-1607
6867	98 SWIGGUM RD	WESTBY	VERNON	54667-8413
6870	225 W LINCOLN ST	ADAMS	ADAMS	53910-9460
6887	105 S 8TH ST	WATERTOWN	JEFFERSON	53094-4724
6914	1231 WATER AVE	HILLSBORO	VERNON	54634-4308
6960	1400 IHM ST	LANCASTER	GRANT	53813-9442
6966	289 S CHURCH ST	BERLIN	GREEN LAKE	54923-2144
6972	19050 DEWEY ST	WHITEHALL	TREMPEALEAU	54773-8525
7401	705 W 9TH ST N	LADYSMITH	RUSK	54848-1252
9836	2109 CAMERON ST	EAU CLAIRE	EAU CLAIRE	54703-4947
9967	1060 E PINE ST	EAGLE RIVER	VILAS	54521-2075
10001	1010 COUNTRYSIDE PKWY	MONDOVI	BUFFALO	54755-5013
10015	1120 E WASHINGTON ST	WEST BEND	WASHINGTON	53095-2608
10102	328 N 4TH ST	TOMAHAWK	LINCOLN	54487-1349
10109	28 RIVERSIDE SQ	PRAIRIE DU CHIEN	CRAWFORD	53821-9642
10118	205 E MAIN ST	BLACK RIVER FALLS	JACKSON	54615-1469
10132	213 JEFFERSON ST	CAMBRIDGE	DANE	53523-9150
10166	550 HWY 151 E	PLATTEVILLE	GRANT	53818-3802
10309	951 W GRAND AVE	WISCONSIN RAPIDS	WOOD	54495-2606
10408	214 W COTTAGE GROVE RD	COTTAGE GROVE	DANE	53527-9213
10422	951 W JAMES ST	COLUMBUS	COLUMBIA	53925-1027
10517	243 S CECIL ST	BONDUEL	SHAWANO	54107-9292
10540	1014 4TH AVE S	PARK FALLS	PRICE	54552-1919

List of LLC Applied

10542	805 MAIN AVE	DE PERE	BROWN	54115-1334
10595	830 GRAND AVE	SCHOFIELD	MARATHON	54476-1118
10602	509 S MAIN ST	PARDEEVILLE	COLUMBIA	53954-9119
10945	205 N MAIN ST	BRILLION	CALUMET	54110-1197
10954	701 W MAIN ST	MARSHALL	DANE	53559-8982
11052	314 W BROADWAY ST	BLAIR	TREMPEALEAU	54616-9365
11710	211 WISCONSIN AVE S	FREDERIC	POLK	54837-4658
11718	619 W WARREN ST	REDGRANITE	WAUSHARA	54970-9396
12489	110 PROGRESS DR	RANDOLPH	DODGE	53956-1451
12677	821 COPPER FALLS DR	MELLEN	ASHLAND	54546
12858	9040 N BOUNDARY RD	OLON SPRINGS	DOUGLAS	54873-8100
13173	24199 STATE RD 35 70	SIREN	BURNETT	54872
13175	1135 APPLETON RD	MENASHA	WINNEBAGO	54952-1905
13248	880 SPRUCE ST	BALDWIN	SAINT CROIX	54002-3264
13348	717 N. MAIN ST	LODI	COLUMBIA	53555-1259
13463	5088 N HWY 51	MERCER	IRON	54547
13775	961 MARKET ST.	NEKOOSA	WOOD	54457-1078
13790	309 GENESEE ST.	WITTENBERG	SHAWANO	54499
13946	412 W. NORTH ST. PLAINFIELD	PLAINFIELD	WAUSHARA	54966-9296
14069	19919 WINNEBAGO ROAD	GALESVILLE	TREMPEALEAU	54630
14302	216 BELKNAP ST	SUPERIOR	DOUGLAS	54880-2964
14362	N3887 STATE RD 55	FREEDOM	OUTAGAMIE	54130
14365	515 WALTER STREET	MAZOMANIE	DANE	53560-9224
14373	830 FRENCH ST	PESHTIGO	MARINETTE	54157-1459
14377	207 N HWY 27	CADOTT	CHIPPEWA	54727-9300
14977	303 DOUGLAS DRIVE	BROOKLYN	DANE	53521-9046
15009	510 GRANDVIEW AVENUE	CAMPBELLSPORT	FOND DU LAC	53010
15039	1560 15TH AVE	UNION GROVE	RACINE	53182-1529
15049	1520 HERITAGE BLVD.	WEST SALEM	LA CROSSE	54669
15154	690 CHURCH ST.	CLINTON	ROCK	53525
15206	3440 DOUGLAS AVE	RACINE	RACINE	53402-3752
15733	2530 BIRCH ST.	EAU CLAIRE	EAU CLAIRE	54703-3453
15932	730 HIGHWAY 35	SOMERSET	SAINT CROIX	54025
15938	802 WAGNER DR	ROBERTS	SAINT CROIX	54023-8648
15975	200 ANN ST.	WATERLOO	JEFFERSON	53594-1167
15996	121 W. 3RD ST.	OWEN	CLARK	54460
16020	928 240TH STREET	OSCEOLA	POLK	54020
16028	614 NORTH MECHANIC STREET	ALBANY	GREEN	53502-9563
16447	111 E. DIVISION STREET	NEILLSVILLE	CLARK	54456
16673	4500 FAIRGROUNDS RD	AMHERST	PORTAGE	54406
16966	213 INDUSTRIAL DRIVE	MARION	SHAWANO	54950-8719
17883	333 PROSPECT AVENUE	NORTH FOND DU LAC	NORTH FOND DU LAC	54937-1466

List of LLC Applied

17126	603 E BRIDGE STREET	NEW LISBON	JUNEAU	53950
16734	1041 ORRIN RD	PRESCOTT	PIERCE	54021
17048	700 SOUTH STATE RD 35	LUCK	POLK	54853



CITY OF PRESCOTT

800 Borner Street North • Prescott, Wisconsin 54021-2012  
(715) 262-5544

PAID SEP 14 2016

CK#1637

### OPERATOR'S LICENSE APPLICATION

**Instructions:**

1. Submit signed and completed application.
2. Pay \$25.00 renewal license for 2 years due in odd number year, \$50.00 new license fee (\$25.00 of this fee is for the background check).
3. All licenses are subject to City Council approval. Allow two weeks for processing.

Full Name (first, middle, last) Rebecca Ann O'Malley

Address W9899 US Hwy 10

City Hager City State WI Zip Code 54014

Telephone # 6514926938 Driver's License # & State DS43-7217-5745-04

Date of Birth 7.5.75 Place of Birth ST-Paul MN

New License  Renewal

Have you completed responsible beverage server training course?  Yes  No

Establishment where license will be used unknown Starting Date \_\_\_\_\_

Have you ever been convicted of a felony? Yes  No   
If yes, date of conviction \_\_\_\_\_ Court \_\_\_\_\_  
Nature of Offense \_\_\_\_\_

Have you ever been convicted of violating any laws of the State of Wisconsin or the United States? Yes  No   
If yes, date of conviction \_\_\_\_\_ Court \_\_\_\_\_  
Nature of Offense \_\_\_\_\_

Have you ever been convicted of violating any license law or ordinance regulating the sale of alcohol beverages or intoxicating liquors?  
Yes  No

The applicant hereby applies for a license to serve fermented malt beverages and intoxicating liquors and agrees to comply with the following:

- A. All federal, state, and local laws, resolutions, ordinance statues and regulations affecting the sale of fermented malt beverages and intoxicating liquors.
- B. Wisconsin Statutes 125.32(2) and 125.68(2).

Applicant Signature Rebecca O'Malley Date 9.14.16

**City Use Only:**

Date Filed _____	Fee Paid _____	Receipt # _____	Application # _____
Chief of Police Approval <u>C. Kmetz</u>	Date <u>9 15 16</u>		
City Council Approval _____	Date _____		



CITY OF PRESCOTT

800 Borner Street North • Prescott, Wisconsin 54021-2012  
(715) 262-5544

PAID SEP 20 2016 \$50  
CK # 4919

### OPERATOR'S LICENSE APPLICATION

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3. All licenses are subject to City Council approval. Allow two weeks for processing.

Full Name (first, middle, last) Samantha Jean Decker

Address: 340 Broadway St. or 21515 Oakdale Dr

City River Falls / Corvran State WI / MN Zip Code 54022, 555374

Telephone # (703) 218-2180 Driver's License # & State QJ17115999313

Date of Birth 10-14-94 Place of Birth Minneapolis, MN

New License  Renewal

Have you completed responsible beverage server training course?  Yes  No

Establishment where license will be used BRICKYARD Pub & Eatery Starting Date \_\_\_\_\_

Have you ever been convicted of a felony? Yes  No

If yes, date of conviction \_\_\_\_\_ Court \_\_\_\_\_  
Nature of Offense \_\_\_\_\_

Have you ever been convicted of violating any laws of the State of Wisconsin or the United States? Yes  No

If yes, date of conviction \_\_\_\_\_ Court \_\_\_\_\_  
Nature of Offense \_\_\_\_\_

Have you ever been convicted of violating any license law or ordinance regulating the sale of alcohol beverages or intoxicating liquors?  
Yes  No

The applicant hereby applies for a license to serve fermented malt beverages and intoxicating liquors and agrees to comply with the following:

- A. All federal, state, and local laws, resolutions, ordinance statues and regulations affecting the sale of fermented malt beverages and intoxicating liquors.
- B. Wisconsin Statutes 125.32(2) and 125.68(2).

Applicant Signature Samantha Decker Date 9/15/16

**City Use Only:**

Date Filed \_\_\_\_\_ Fee Paid B. Kunkel Receipt # \_\_\_\_\_ Application # \_\_\_\_\_  
 Chief of Police Approval \_\_\_\_\_ Date 9-21-16  
 City Council Approval \_\_\_\_\_ Date \_\_\_\_\_

## Status of Wisconsin cities and villages (I): Fiscal and economic health

*A new WISTAX study examines the state of Wisconsin's roughly 600 cities and villages. During 2011-14, their property taxes grew 5.2%, while their state aids fell 7.5%. Spending for public safety and, to a higher degree, streets has been maintained, but debt service costs have jumped. A survey of municipal officials shows that they rated job growth more positively in large communities than small.*

The advent of the “Great Recession” is now almost ten years old, and many Wisconsinites have finally recovered from the downturn. But is the same true for the roughly 600 cities and villages where 71% of residents live?

A new report, *The 2016 State of Wisconsin's Cities and Villages*, attempts to answer that question. WISTAX researchers prepared the study for the League of Wisconsin Municipalities, relying on federal and state data, as well as survey responses from municipal officials.

Among issues the report addressed were: revenue, expenditure, and debt trends; overall fiscal health; service frequency and quality; community economic conditions; and civic engagement.

### Tax and spending trends

What most distinguishes Wisconsin cities and villages from municipalities in many other states is the degree to which they rely on property taxes. Of \$4.8 billion in revenue, 57% came from the property tax in 2014. The second largest source (21%) was state aid, followed by 13% in local fees and charges.

■ **Taxes.** Since the state limits levy growth and funds municipal aids, state officials have considerable control over local finance. From 2011 to 2014, city and village property taxes increased 5.2%, or about 1.7% per year. State taxes were up 8.0%, while state aids fell 7.5%. Adjusted for inflation, levies were down 0.8% and aids were off 12.8%.

■ **Spending.** With local revenues constrained, spending priorities shifted. Public safety (31.4% of spending) and streets (13.8%) were two areas that held their expenditure shares since the recession. General government administrative costs (9.1%) and spending for parks and related programs (8.2%) showed some erosion.

The most noticeable shift, however, was in debt service. From 14.4% of spending in 2000, it reached 19.6% in 2009 and peaked at 25.7% in 2012. By 2014, that percentage had retreated to 21.7%.

### Local economic conditions

Expenditures suggest municipal priorities but do not lead to conclusions about service quality. Information on street quality is illustrative.

■ **Infrastructure.** Last year, 68% of city and village streets were rated in “good” or better condition compared to 72% in 2011. While 37% of municipal streets were rated “excellent” or “very good” in 2010, that percentage fell to 31% by 2015. Likewise, those rated “fair” or “poor” increased from 29% to 32%.

■ **New Construction.** If street quality is one indicator of how attractive a municipality is to future development, another is new construction. Median (half higher, half lower) rates of increase in municipal property values due to new construction declined steadily from 2.2% in 2005 to 0.4% in 2011. In more recent years these rates began to recover, reaching 0.7% by 2014.

Much of that increase was due to commercial development. Though it accounted for only 27% of total city-village property values, it represented over half of all new construction during the most recent four years examined.

By municipal size, growth in new construction was 1.0% or more in cities and villages with populations above 5,000 but lagged in smaller communities. The median increase in the smallest communities (<1,000) was 0.3% in 2014, the same as in 2010.

■ **Job Growth.** A third indicator of local economic conditions came from a survey of municipal officials. Of those responding, 53% said community-wide employment rose in the past year compared to only 13% who said it had declined, a net difference of +40. However, this net difference varied between large and small municipalities. In those with more than 15,000 residents, the difference was +77 vs. +27 for smaller ones.

The difference was similar when 2015 and 2010 were compared. Over the period, 69% of large communities reported net job growth compared to only 19% for small ones.

### Survey: Finances and services

In addition to job trends, the WISTAX survey of officials in almost 500 cities and villages also asked them to evaluate municipal financial health, service and staffing levels, and civic engagement (see *Focus* #17 for an in-

depth discussion of citizen involvement in local government).

Comparing 2015 with 2010, 41% of officials rated the financial condition of their municipality “somewhat or much better,” while 30% said it was “somewhat or much worse,” for a net positive difference of +11. The remainder saw no change. These net positive scores were higher in large municipalities (+24%) than in smaller ones (+8%).

To the degree that local fiscal problems existed, it was thought they might be reflected in staffing and benefit decisions. Overall, 27% of municipalities said they had more full-time equivalent

employees in 2015 than 2014, while 16% said fewer—a net difference of +11 points. Again, there was a difference between populous (+31) and less populous (+2) cities and villages.

Health insurance is a major cost for all employers. The survey showed a significant shift in employee cost-sharing over time. In 2010, 46% of municipalities reported employees paying 5% or less of the total health premium. By 2015, that percentage had dropped to 24%; 57% replied that premium-sharing was 10% or more. These figures reflect a change in state law in 2011 (Act 10).

Shifts in speed or frequency of key service offerings were not major but no-

ticeable in several cases. Net improvements in response times were reported for police (+5 points, 10% faster vs. 5% slower) and fire (+10). However, service frequency declines were reported for lawn mowing (-3 points), snow plowing (-10 points), and street repair (-11).

### Tale of two cities

Taken together, survey results on fiscal health, economic conditions, and civic engagement suggest a Dickens like dichotomy. In larger municipalities where most Wisconsinites live, new construction, job growth, and civic engagement exists. In small communities, however, these indicators of municipal health lag. □



### Wisconsin Taxpayers Alliance

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## Capital Notes

■ Wisconsin ranked last among the states on a new composite index of business start-up activity in 2015. The index was based on the number of startups per 1,000 businesses, the percent of the population starting a company, and the share of entrepreneurs who opened a new business because of market opportunity, rather than unemployment. Minnesota (44th), Iowa (43rd), and Illinois (41st) also ranked among the bottom 10. The top states were Montana, Nevada, Wyo-

oming, Oklahoma, and Texas. (Source: Kauffman Foundation).

■ The state is making it easier for pharmacists to dispense the anti-overdose drug Naxalone without a prescription. The Department of Health Services issued a blanket standing order which allows local pharmacies to dispense the drug without a prescription from a doctor. The drug will be available to anyone who has already had an overdose, was prescribed

a narcotic, or has a substance abuse disorder.

■ State agencies granted \$9.7 million in merit-based bonuses, retention payments, or equity adjustments in fiscal 2016. A total of 4,638 employees—about 15% of the state workforce—received these awards. The 2016 figures are not directly comparable to prior years as UW System employees exited the civil service system after fiscal 2015. (Source: Wisconsin State Journal)

## Status of Wisconsin cities and villages (II): Citizen engagement

*Due to lack of opposition, about half of state assembly and three-fourths of state senate members are known before the fall election. A new WISTAX study finds that lack of electoral choice is even more of a problem at the municipal level. Over half of cities and villages surveyed typically did not have contested local board seats. Lack of interest in and knowledge of government is the leading reason cited.*

Wisconsin's August primary elections are now past. Between unopposed candidates and primary survivors without fall opposition, about half of next year's state representatives and three-quarters of state senators are now known.

This lack of voter choice at the state legislative level is not new. But its presence at the local level is even more problematic. A recent WISTAX survey of about 500 cities and villages helps answer that question (see box, below).

### Candidate count, choice down

The survey asked municipal officials to estimate candidate numbers for village board and city council seats over the past three- and five-year periods. The resulting information provides a simple measure of citizen engagement "in the trenches."

The findings were not encouraging. Regardless of municipal size, 52% of officials said they averaged zero to one candidate per seat over the past three years. Only 4% reported an average of two or more candidates per seat. In other words, they typically had no contests for board and council posts.

■ *Big.* These figures are even more discouraging when population is considered. In larger municipalities (with 15,000 or more residents), 21% typically had uncontested elections; 74% averaged between one and two candidates per seat, thus sometimes offering voter choice. Sadly, only 5% reported that races involving two or more candidates were the norm.

■ *And small.* In smaller communities—those with fewer than 15,000 residents—almost two-thirds had no board or council contests. Another 44% averaged between one and two candidates per race. Only 4% regularly gave voters a choice of two or more candidates.

■ *Trending Down.* What makes these findings troubling is that they are getting worse. Of officials surveyed, 46% said that, over the past five to 10 years, competition for seats on governing boards has "decreased a lot" (10%) or "somewhat" (36%). Only 11% saw an increase.

This trend holds regardless of population size but is somewhat more prevalent among small municipalities. A decline in electoral competition was reported in 44% of larger communities and 47% of smaller ones. While 21% of larger cities and villages noted some increase in competition, only 7% of their smaller counterparts could say the same.

### About the City-Village Survey

This spring, WISTAX researchers sent city and village officials a survey with questions on fiscal trends, service quality, economic prospects, and civic health. Response rates were highest for municipalities with over 15,000 residents (74%) and averaged 30% overall. Results were analyzed comparing municipalities with populations above and below 15,000. The survey was part of a larger study commissioned by the League of Wisconsin Municipalities to assess the 2016 status of its members.

### Getting to why

Some analysts explain citizen dissatisfaction with governments by some combination of partisanship, legislative dysfunction, redistricting, and political careerism. These factors cannot fully explain why citizens might be shying away from municipal service.

■ *Apathy and ignorance.* Written comments from 53 municipal officials provide insight. Though expressed in a variety of ways, apathy and lack of citizen interest was the leading reason (20 respondents) given for lack of municipal candidates. Related reasons (3) included lack of citizen knowledge of government or interest in municipal news. Interestingly, five comments specifically singled out young people, e.g., "lack of interest by younger population."

■ *Family and job commitments.* The other major reason (12) cited for the paucity of candidates was lack of time due to family or job commitments. Economic hardship and the more generic "weak economy" were related factors (3) mentioned.

■ *Controversy?* Issue-related concerns (8) were also given. But, oddly, most suggested lack of controversy, e.g., "no burning issue." Fire department controversies were mentioned twice.

■ *Satisfaction.* Five officials expressed a similar sentiment, typified by: "Our residents see effective government and feel it is not necessary to run for office."

■ *Political climate.* No other explanation attracted more than a few responses. However, the following all touch on the nature of modern politics: “political environment is unattractive resulting from state and national climate”; “aversion to blame and aggravation”; “dysfunctional board”; and “financial decisions becoming harder.”

### Getting to yes

Scattered among the comments of local officials were ideas for possible change. Wisconsin’s Yankee and Jacksonian roots resulted in more local

units of government, larger governing bodies, and more elected, as opposed to appointed, positions than found in most states. One official recognized that, offering: “considering reducing the board size.” Another suggested that the community’s “small population” made it hard to find local candidates.

State laws, rules, and mandates can also make it more difficult to seek election and serve at the local level without sacrificing large amounts of family time. One municipal official regretted that “the process to get on the ballot seems to intimidate candidates.”

### Harder questions

The declining number of municipal candidates, particularly in small communities, can be explained and partly addressed. But it raises some unsettling questions.

In a representative democracy where we must hold government accountable, what does the lack of candidates say about the health of our republic, our state, our communities? Several officials said local elective service was “thankless” and “underpaid,” which suggests a final thought: Are we offering part-time local officials the appreciation and respect they deserve for the sacrifices they make? □



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## Capital Notes

■ *State employees will see a 1.6% increase in their health insurance premiums next year, the Department of Employee Trust Funds announced. The state plans cover more than 250,000 state and local government employees and their families.*

*The rise in state premiums is far below a much higher increase in health insurance premiums throughout the state. Wisconsin Health News has reported an overall 6.7% increase in those*

*premiums, based on survey that consisted of 80% private plans and 20% public plans. Nationally, premiums are projected to rise 6% in 2017, according to a study by the National Business Group on Health.*

*The increase comes as Gov. Scott Walker (R) is considering a self-funding model, known as self-insurance. Some experts contend the self-insurance system could cost the state less, but others argue it would result in higher costs.*

■ *In addition to approving its 2017-19 state budget request at its recent meeting, the UW Board of Regents approved UW-Stout's request to create a new school of engineering. The campus said the school would “allow us to more effectively coordinate program offerings,” which now include computer, manufacturing, mechanical, and plastics engineering. Engineering is already a focus at UW-Madison, UW-Milwaukee, and UW-Platteville.*



## Wisconsin's Migration Challenge

Residents Stay, But State Needs Newcomers to Bolster Workforce

*IRS figures show Wisconsinites move to other states at lower rates than residents of all but three states. However, because Wisconsin lags in attracting people, it is a net loser in migration. Weather, relatively low wages, and, in some cases taxes all play a role. The state needs to reverse this trend: Over the next 20 years, it must attract as many as 300,000 people just to maintain its current workforce.*

The combination of baby-boom retirements and declining school enrollments means Wisconsin's biggest long-term economic challenge is a shortage of workers. As a 2014 WISTAX study, "*The Impending Storm*," noted, forecasts from state demography experts show the working-age population declining 0.2% between 2010 and 2040.

To ensure continued economic growth, Wisconsin must not only retain its current workforce but must also attract workers from other states. More people must move here from elsewhere than leave.

State population forecasts are optimistic on this point. By 2040, they assume a gain of nearly 300,000

people from migration. Unfortunately, recent trends show the opposite. Since the mid-2000s, Wisconsin has lost more residents from migration than it has gained. New IRS figures show that continuing through 2014.

The figures also show that Wisconsinites are among the least likely to leave their state. Thus, much of the recent net losses are from failure to attract residents of other states. While state leaders should work to retain residents who might leave, they must focus on attracting people from elsewhere.

### THE BIG PICTURE

In every year since 2005, more people left Wisconsin than moved here. But that was not always the case.

### Gaining People, Losing Families

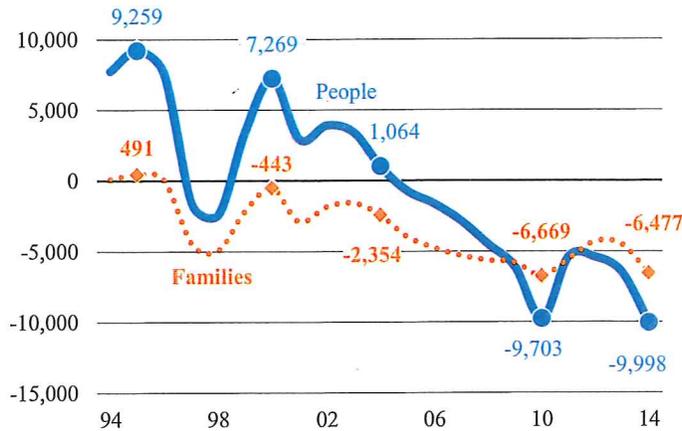
*People.* From 1994 through 2004, Wisconsin gained 43,000 more people than it lost due to migration (see blue line in Figure 1, page 2). In fact, throughout that decade, Wisconsin was a net gainer of people in every year, except 1997 and 1998. These figures are based on income tax returns (see box on page 9), so they could be understated since some low-income movers do not file.

While gaining 43,000 people is not large for a state with more than

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Moving by County • Property Values Rise • More Teachers and Administrators • WISTAX Wins National Award

**Figure 1: Wisconsin Migration Patterns Worsen**  
Net Migration of People (blue) and Families (orange), 1994-2014



five million residents, the net gain was a positive, given the state's northern location. Generally, the nation's population has shifted from north and east to south and west.

During 1994-2004, net migration (the difference between those moving in and out) was negative for Illinois (-639,203), Michigan (-170,658), and Iowa (-64,763). Like Wisconsin, Minnesota (28,191) gained residents from migration, albeit a smaller number.

*Families.* While good news, Wisconsin's population gains during this period masked a troubling trend: The state was losing more families than it was gaining (Figure 1, dashed orange line). During the decade studied, 19,413 more families left Wisconsin than came here from other states.

That the state was gaining people but losing families might seem contradictory. However, the reason is family size. On average, families entering Wisconsin were 9.5% larger than those leaving.

### Losing People and Families

While Wisconsin continued to add people during 2000-04, net annual gains declined from 7,269 in 2000 to 1,064 in 2004 (see graph above). After 2004, our temporary migration advantage reversed as the number of people leaving exceeded the number arriving. Over the next 10 years (2005-14), the state lost 52,380 residents to migration, and about the same number of families (52,403).

Annual losses generally grew over time. In 2005, 674 more people (and 3,886 more families) left Wis-

consin than came here from other states; by 2014, the net loss was 9,998 people and 6,477 families.

Wisconsin was not alone in losing population during this period. Net losses in Illinois (-513,986) and Michigan (-435,754) were more than eight times larger than here. Minnesota (-60,723) lost slightly more than the Badger State, while Iowa's net loss was small (-1,349).

Figure 1 is not a welcome sight for policymakers. Workforce projections mentioned at the outset assume positive net immigration of almost 300,000 people from 2010 to 2030. Since 2010, however, the state has lost more than 27,000 residents. Without a reversal in this outflow, the size of the state's workforce will begin to shrink even sooner than projected.

### Losing Income

When a family moves to another state, Wisconsin loses not only an actual or potential worker but also his or her income and wealth. Money that would have been spent or invested here to create and sustain jobs disappears.

In 2014, Wisconsin lost more than \$500 million in income due to the net outflow of families. During

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the ten years from 2005 through 2014, losses totaled \$3.6 billion.

### National Perspective

While the focus here is primarily on migration to and from Wisconsin, a national perspective is helpful. During 2012-14, Wisconsin's net migration rate (net migration per 1,000 residents) was -1.55: For every 1,000 residents, Wisconsin lost 1.55 due to migration. This rate placed us 35th among the states; 15 states had worse rates, including Illinois (-6.12, 48th) and Michigan (-2.23, 40th). Minnesota's rate (-1.34, 31st) was slightly better than Wisconsin's. Iowa (-0.33) placed best (21st) among the five upper midwest states.

Figure 2 summarizes these net migration figures. Only 20 states, mostly in the west and south, gained population on net (two shades of green). Leading gainers were North Dakota (+13.42 per 1,000 residents), Texas (+7.73), South Carolina (+7.18), Colorado (+5.94), and Nevada (+5.76). States with the most adverse rates were Alaska (-11.22), New York (-7.21), Illinois (-6.18), New Mexico (-5.58), and New Jersey (-5.03).

For the rest of this report, the focus is on migration during 2012-14, the most recent three years for which data are available.

### WISCONSIN DETAIL

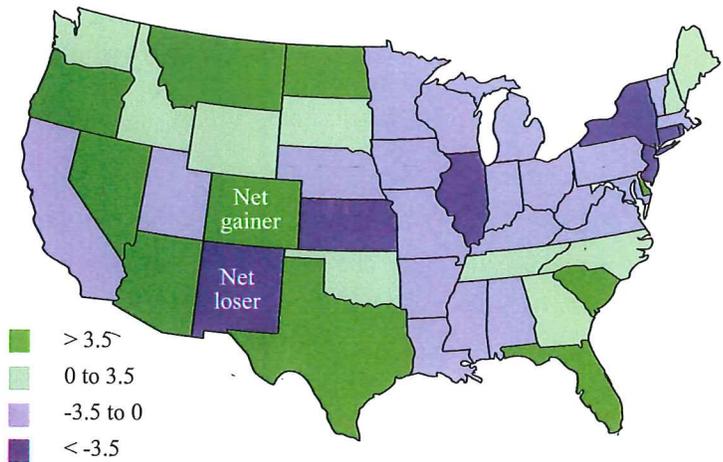
If state leaders are to address effectively Wisconsin's migration problem, they must first understand its geography.

#### "Trading" Partners

For Wisconsin, nearly two-thirds of migration activity occurs with just 10 other states. Of the 271,436 people who left during 2012-14, 65% moved to one of our four neighbors, or to Florida, Texas, California, Arizona, Colorado, or Indiana. Of the 249,633 who moved here from elsewhere, 66% came from one of these states (see Table 1). Wisconsin gained people on net with only three of these 10 states: Illinois, Michigan, and Iowa—all of which are neighbors.

In terms of people, Wisconsin's largest single "trading" partner was Illinois. During 2012-14, 37,873 state residents left for the Land of Lincoln, while 51,905 made the opposite move. On average, those moving here had higher family incomes than those leaving—\$56,092 vs. \$50,150. Thus, net migra-

**Figure 2: U.S. Population Moving West, South**  
Net Migration Per 1,000 Population, by State, 2012-14



tion with Illinois added almost \$500 million to total Wisconsin income during those years.

Neighboring Minnesota was Wisconsin's second leading migration partner. During the three years, 2,503 more Wisconsinites left for Minnesota than came here (35,381 vs. 32,878). Similar to Illinois, those entering Wisconsin had average family incomes greater than those leaving (\$53,250 vs. \$47,435). The Badger State had a modest income loss (\$1.9 million) to Minnesota because of the net population loss.

Compared to Illinois and Minnesota, migration to other states pales. While more than 68,000 people moved between Wisconsin and Minnesota, fewer than 37,000 were involved in Wisconsin-Florida or Wisconsin-Texas moves. The two southern states were Wisconsin's third and fourth largest partners in exchanging people.

**Table 1: Wisconsin's 10 Largest Migration "Partners"**  
Migration Out of and In to Wisconsin, by State, 2012-14

State	Out of Wis.		Into Wis.		Net	
	Num.	Avg. AGI	Num.	Avg. AGI	Num.	AGI (\$ Mill.)
Illinois	37,873	\$50,150	51,905	\$56,092	14,032	\$478.7
Minn.	35,381	47,435	32,878	53,250	-2,503	-1.9
Florida	21,892	93,554	14,646	51,694	-7,246	-702.1
Texas	20,711	54,559	12,533	52,358	-8,178	-229.3
Calif.	14,973	63,721	13,390	55,193	-1,583	-159.5
Mich.	11,843	53,819	12,773	49,285	930	1.8
Arizona	10,889	62,576	7,114	52,766	-3,775	-162.6
Iowa	7,761	49,987	7,885	47,213	124	-6.7
Colorado	7,862	49,518	5,750	49,548	-2,112	-79.1
Indiana	6,648	52,321	6,303	48,755	-345	-12.5
All States	271,436	57,394	249,633	54,056	-21,803	-1,318.9

Also, Wisconsin's largest migration deficits were with these two states. During the three years studied, net outmigration was 7,246 to Florida and 8,178 to Texas. In both cases, average incomes of those leaving were greater than of those arriving. The gap was widest with Florida: Incomes of those leaving the Badger State

**During 2012-14, just 1.9% of Wisconsinites moved to another state. Only three states had a lower percentage: California, Michigan, and Ohio. Nationally, 2.6% of the population moved interstate.**

averaged \$93,554, compared to just \$51,694 for those coming here. Net, Wisconsin lost nearly \$1 billion in income to Florida and Texas combined.

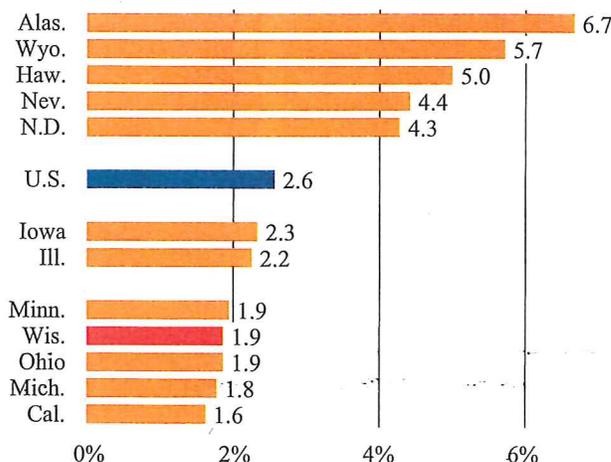
Wisconsin also lost significant income to Arizona. Along with Florida, that sunny, desert state is a popular retirement destination. Net, the Badger State lost 3,775 people and \$162.6 million in income to Arizona.

**A State of "Stayers"**

While Wisconsinites leaving for elsewhere is a concern for state officials, it is important to grasp an essential point: Wisconsin residents are less likely to move than residents of other states. During 2012-14, 2.6% of the U.S. population on average moved each year from one state to another, compared to only 1.9% for Wisconsin (see Figure 3). Indeed, the state ranked 47th on that percentage, ahead of only California, Michigan, and Ohio.

With only a small share of its population leaving, it is clear that Wisconsin is good at keeping its own.

**Figure 3: Wisconsinites Tend to "Stay Home"**  
% of Pop. Moving Between States, 2012-14



Reasons vary, but they fall into one of two categories. Either the state has attributes that are attractive, or residents are culturally hesitant about moving elsewhere. The latter seems likely as lack of interstate migration appears to be a Midwestern trait. Along with Wisconsin and Michigan, Minnesota (46th), Illinois (42nd), and Iowa (40th) all ranked low in the percentage of residents leaving their state.

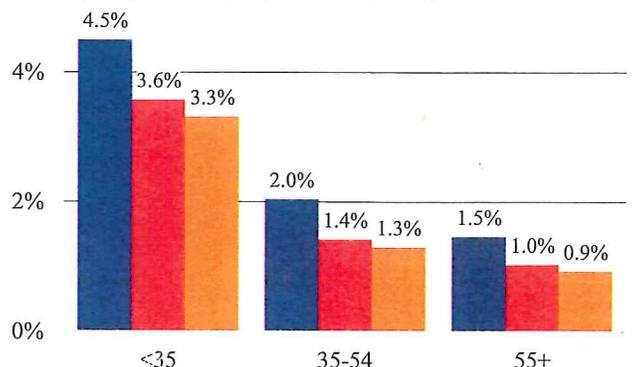
At the same time, Wisconsin does not attract many residents of other states. During 2012-14, an average of 1.7% of the state's population were new arrivals from another state. Wisconsin ranked 45th among the states, ahead of only California, Illinois, Michigan, New York, and Ohio. Minnesota (1.8%, 43rd) fared only slightly better than Wisconsin, while Iowa (2.3%) ranked 38th.

**Movement by Age and Income**

Individuals and families move for a variety of reasons. Young people relocate to pursue higher education, find their first "real" job, or travel before settling down. For those in their 30s, 40s, or 50s, a job change for higher pay or a better quality of life (e.g., good schools, availability of parks and recreation) may trigger a move. As individuals retire, weather and taxes can influence location decisions. If policies to retain and attract people are to be developed, information about mover characteristics is needed, especially age and income.

*Leavers by Age.* First, it must be recognized that both here and nationally, young people tend to move to other states at higher rates than others (see Figure 4). Nationally, 4.5% of those under age 35 move between states, while only 2.0% of those

**Figure 4: Migration Rates Vary by Age**  
% of Pop. Moving Between States by Age of HH Head, U.S (blue), Out of (red) and Into (orange) Wis., 2012-14



35 to 54 do so. This is to be expected since many young people leave home for college. Upon graduation or military service, they often move again to begin a career.

Second, migration rates decline as people age and settle into jobs and homes. Rates were lowest among those ages 55 to 64, when job change is less likely as retirement nears. Migration rises slightly among those of retirement age (65 or older).

A third important point regarding age is that Wisconsin's outmigration rates trailed national averages among all age groups. The difference was largest in households headed by persons between 26 and 34. In this group, an average of 4.5% of the U.S. population moved to a different state during 2012-14, compared to only 3.3% for Wisconsinites.

As age increased, U.S.-Wisconsin differences narrowed. For example, 1.1% of Wisconsin residents in households headed by someone 45 to 54 left the state; nationally, that percentage was 1.5%.

*Entrants by Age.* Wisconsin's impressive ability to keep its own is offset by its relative inability to attract others. While 1.9% of Wisconsinites on average left the state during the three years studied, just 1.7% of the state's population came from elsewhere.

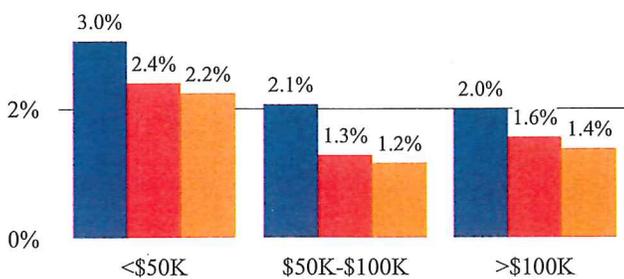
This pattern was consistent across ages (see orange bars in Figure 4). Note that nationally, rates of outmigration and immigration must be the same: A person departing one state is arriving in another.

### By Income

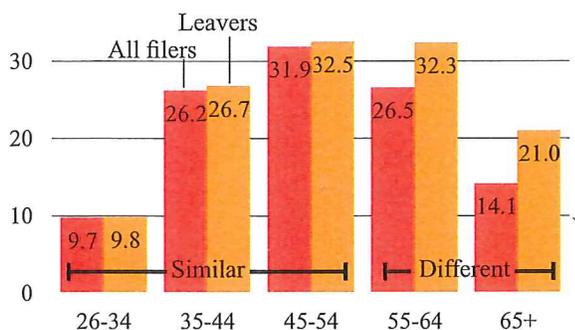
In many ways, migration by income level (Figure 5) mimics the age pattern. This is not surprising as income generally rises with age. Again, migration

**Figure 5: Migration Varies by Income**

% of Pop. Moving Between States by Income of HH Head, U.S. (blue), Out of (red) and In to (orange) Wis., 2012-14



**Figure 6: % of Pop. in High-Income Families**  
% With Incomes > \$100,000, All (red) and Leavers (orange), Wisconsin, 2012-14



rates here are less than national rates at all income levels.

However, at incomes above \$100,000, Wisconsin bucks the national trend. U.S. migration rates were nearly identical for those with incomes in the \$50,000-\$100,000 and over-\$100,000 groups (2.1% and 2.0%, respectively). In Wisconsin, however, rates rise from 1.3% to 1.6%. For the smaller group with incomes above \$200,000, Wisconsin's outmigration rate is 2.2%. This is the only income cohort in which Wisconsin's migration rate nearly matches the nation's (2.3%).

*High-Income Families.* Upon closer inspection, Wisconsin's challenge is primarily with high-income seniors. Figure 6 shows, by age, the percentage of people with family incomes above \$100,000. For example, during 2012-14, 1.1 million Wisconsinites were members of families headed by someone between 35 and 44 years of age. Of them, 285,000, or 26.2% (second red bar), had incomes above \$100,000.

Among the 57,935 in that same age group who left the state during 2012-14 (orange bars), 15,491, or 26.7%, were in high-income families. In other words, among those 35-44 years of age, high-income filers were just as prevalent among those leaving (26.7%) the state as among those remaining (26.2%). The same pattern held for those younger (26-34) and just older (45-54).

However, the pattern does not hold for those 55 or older. For all families headed by someone 55 to 64, 26.5% had incomes above \$100,000. Among those leaving the state, 32.3% had similar incomes, however. For those 65 or older, the percentage difference was even greater: 14.1% for all residents, but 21.0% for emigrants. In short, Wisconsin is losing a disproportionate share of high-income seniors.

Census figures analyzed here do not reveal the destination of these individuals, but they hint at one: Florida. About 15% of those moving to Florida from all other states were 65 or older, the highest percentage of any state, and their incomes averaged almost \$115,000.

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**Wisconsin is losing a disproportionate number of high-income retirees. While 14.1% of Wisconsin filers 65 or older had incomes above \$100,000, 21.0% of movers of that age had high incomes.**

Closer to home, average incomes of former Wisconsinites regardless of age, who moved to Collier (\$341,301), Miami-Dade (\$216,529), Palm Beach (\$196,539), or Lee (\$144,071) counties in Florida topped \$100,000. Orange County (\$100,096) in California was the only other county near that level. Combining national senior data with Wisconsin information about high-income movers suggests many of the state's high-income seniors are moving to Florida.

**Wisconsin in Short**

Due to an aging population and relatively low birth rates, Wisconsin must retain its workers and attract others from elsewhere if its workforce is to grow. Over the past decade, however, more people and families left Wisconsin than have moved here from other states. What is more, the imbalance continues to worsen.

For the most part, this pattern is not about outmigration: Wisconsin's outmigration rate is lower than all other states save California, Michigan, and Ohio. The challenge for the state is attracting people. The number of people and families moving to Wisconsin is even smaller than the relatively small number leaving. State leaders and policymakers need to explore how to turn that around.

**WHY DO PEOPLE MOVE?**

Research on migration is abundant, and sometimes contradictory. Studies generally focus on two areas—individual characteristics (age, education, etc.) and external factors (labor market conditions, quality of life, taxes, etc.)—and their impact on migration patterns.

**Individual Characteristics**

Among migration researchers, general consensus prevails on the relationship between certain

individual characteristics and the decision to move. First, consistent with Figure 4 (page 4), young adults tend to move more than middle-aged or older people. Second, those with college degrees are more likely to move than individuals with less education. And third, renters are significantly more likely to move than homeowners.

This line of research is consistent with the tendency of Wisconsinites to remain in-state. State residents are generally older than those in other states: We rank 16th in percentage of residents ages 35 or older. Wisconsin also ranks in the top half (20th) of states on home ownership, and in the bottom half (27th) on share of residents with college degrees.

These characteristics make Wisconsin residents less likely to leave than residents of other states. They are also factors over which state officials have little or no control.

**External Factors**

While there is general agreement on which personal characteristics are associated with migration, the same is not true for external factors. That said, most studies find labor market conditions are associated with moves between states.

*New Job.* For young people, particularly those just graduating college or leaving the military, a move across state lines is not uncommon as they begin careers. For mid- or late-career workers, a job transfer or unemployment can trigger a move.

For the unemployed, jobs are easiest to find when unemployment rates are low. In 2015, Wisconsin's unemployment rate averaged 4.6%. While below the national average, this was still higher than in 18 states, including neighboring Minnesota and Iowa (both 3.7%). That stands in contrast to 1992-99, a period when the state's unemployment rate was one of the 10 lowest and Wisconsin was adding residents via migration. In other words, for job seekers, the job market was more favorable here than elsewhere.

At the individual level, policymakers can do little about job transfers. For example, it is unlikely that lower state taxes would stop a multi-state firm from transferring Jane Smith to another state where her talents are badly needed.

However, by ensuring that Wisconsin's transportation network, tax system, and schools are attractive to firms looking to relocate, state officials can increase

aggregate transfers of people to the state.

*Better Paying Job.*

While the unemployed may relocate to find work, most workers who move do so for higher pay. IRS figures do not provide direct information on why people move, but they provide hints. Information from 2014 are consistent with people moving for higher-paying jobs.

That year, the IRS began reporting two years of filer income. Thus, for any particular group, average incomes before (2013) and after a move (2014) can be compared.

Two features of the data stand out. First, movers—especially those of working age—generally had lower average incomes in 2013 than non-movers. Second, they had larger income gains than those not moving.

Table 2 (blue box) shows that 2013 incomes averaged \$55,807 for those who moved from Wisconsin to another state. That was over \$10,000 less than the \$66,767 claimed by those who did not move (unshaded section). However, movers reported income gains averaging 4.1% after moving, versus one-year gains of 1.2% for those who remained in the state.

This pattern—movers having lower incomes but more income growth than non-movers—changes with age. Among movers under 26, average incomes were only slightly less than those of non-movers (\$21,123 vs. \$21,338). However, their average income growth (29.1) from 2013 to 2014 exceeded the 17.7% increase averaged by those remained in the state.

For those in the 26 to 34 age range, income gains were not as large, but those moving from the state experienced more income growth than those who did not (15.3% vs. 9.6%).

While year-over-year wage gains contribute to these large income changes, other factors can play a role. Particular for individuals under 35, marital status is one factor. Some of these filers were single in 2013 but married a year later. Their returns showed a single person's income in 2013, but a couple's

**Table 2: Income Gains For Wisconsin Movers Generally Higher Than For Non-Movers**  
Average AGI and % Change, By Age, 2014

Age	Non-Movers			Moved Out of Wis.			Moved In To Wis.		
	2013	2014	% ch.	2013	2014	% ch.	2013	2014	% ch.
All	\$66,767	\$67,595	1.2%	\$55,807	\$58,114	4.1%	\$53,929	\$55,484	2.9%
<26	21,338	25,119	17.7%	21,123	27,278	29.1%	20,957	24,823	18.4%
26-34	42,563	46,660	9.6%	38,985	44,949	15.3%	39,527	44,485	12.5%
35-44	71,480	74,734	4.6%	69,638	73,059	4.9%	74,125	71,771	-3.2%
45-54	86,877	87,765	1.0%	91,527	93,247	1.9%	87,339	89,877	2.9%
55-64	86,854	84,405	-2.8%	111,865	97,859	-12.5%	94,530	91,164	-3.6%
65+	65,532	63,241	-3.5%	80,808	76,246	-5.6%	69,816	64,976	-6.9%

income in 2014. A significant household income gain would be expected with marriage. Unfortunately, the IRS does not report filing status in their migration data.

Income patterns shifted as individuals entered their prime earning years, 45 to 54. Income growth continued to be larger for movers (1.9%) than non-movers (1.0%), but differences were much smaller than for those under 35. The more noticeable difference was in average income before moving. Those leaving the state had higher incomes in 2013 than those staying (\$91,527 versus \$86,877).

After 55, retirement becomes a factor in analyzing incomes of movers and non-movers. As individuals leave the workforce, their incomes decline. IRS figures show this decline for the two oldest groups shown above. Retirees move for reasons other than wages and those are explored later.

Nevertheless, the pattern of higher average incomes for those leaving compared to those staying not only continued for those 55 or older, but the gap widened. The difference was 5.4% (\$91,527 vs. \$86,877) for those ages 45 to 54, but more than 20% for for those 55 or older.

*Wisconsin Wages.* If people leave the state for higher paying jobs elsewhere, it is useful to explore how wages here and elsewhere compare. An annual federal survey shows wages here, both in total and for many individual occupations, rank in the lower half of states.

Historically, Wisconsin has been a relatively low-wage state. In 2015, it ranked 29th nationally on average wages across all occupations. Among 22 major occupational groups, wages trailed the 50-state median (half lower, half higher) in 16. The

other six occupational groups were construction, education, healthcare technicians (doctors, nurses, etc.), healthcare support, office administration and support, and sales.

A closer look at specific occupations highlights the challenges Wisconsin faces, particularly when trying to keep or attract college graduates. Table 3

**One of the challenges Wisconsin faces is low average wages, particularly for occupations that require college degrees. For example average pay for mechanical engineers in Wisconsin is nearly 14% below the 50-state median.**

shows average wages for 10 relatively high-paying occupations that typically require college degrees. In each one, average wages in Wisconsin are below the 50-state median.

Particularly noticeable are wages paid to engineers. Electrical and chemical engineers earn about 9% less than the median. Mechanical engineers earn nearly 14% less. Wisconsin's average pay for mechanical and electrical engineers placed it in the bottom 10 states.

At least two factors can mitigate the impact of wage differentials. First, Wisconsin's cost of living is less than in many other parts of the country, particularly on the east and west coasts. Second, some people will trade higher earnings for attractive amenities, such as quality schools or recreation facilities. On the other hand, high state-local taxes can exacerbate post-tax wage differences.

**Table 3: Wisconsin Wages Below Par**  
Average Wage, Wis. vs. Other States, Sel. Occ's, 2015

Occupation	Wis. Avg.	Wis. Rk.	50-State Median	Wis. +/- Median
Human Resources	\$55,330	35	\$58,595	-5.6%
Marketing	56,330	39	62,490	-9.9
Accountant	67,420	27	69,255	-2.6
Credit Analyst	64,280	36	69,595	-7.6
Ins. Underwriter	63,850	32	66,110	-3.4
Systems Analyst	79,200	29	82,120	-3.6
Comp. Prog.	73,830	29	76,040	-2.9
Chemical Engineer	88,660	37	97,600	-9.2
Electrical Engineer	83,080	42	91,250	-9.0
Mech. Engineer	72,930	49	84,685	-13.9

**Taxes**

Researchers debate the impact of taxes on migration patterns. Young people often find wages and local amenities such as recreation, cultural attractions, and nightlife more important than taxes. Middle-aged families often place a premium on good schools and safe neighborhoods.

At the same time, taxes may be important for specific groups. Two recent studies show taxes to be a significant factor in explaining international and interstate movement of "star" inventors and scientists with high incomes.

WISTAX analysis of IRS figures provides some confirmation of this pattern. First, a 2012-14 database of state-to-state movement of families was created with nearly 7,000 observations. Then, advanced statistical techniques were used to identify factors that are related to these movements.

The most significant factor was proximity. As would be expected, there was much more movement to neighboring states than to others. That makes sense, for individuals are more likely to have family and friends in neighboring states and be more familiar with them than states 500 or more miles away.

The next two factors that explained interstate moves were income taxes and winter temperatures. Property and sales taxes, on the other hand, appeared to have little impact on migration. Wages and unemployment rates also seemed minimally related to moving.

The analysis covered all movers; but no age or income figures were available for state-to-state movements. Lack of information on age and income could influence the findings. It has already been shown that seniors are affected by different factors than those influencing young people.

*Taxes, Weather, and Seniors.* Although IRS figures do not include age and income data for specific state-to-state moves, they do provide that information for moves into each state from all other states combined. Analyzing these figures suggests high-income seniors are more likely than their lower-income counterparts to move to warmer states with no income tax.

Among those 65 or older, more than half moved into one of the 10 states listed in Table 4 (see page 9). Three (Florida, Texas, and Washington) have no income tax, while another three (New York,

**Table 4: To Which States Do Retirees Move?**  
% in Income Group Moving to Particular State, 2012-14

State	Wint. Temp	<\$100K	\$100K- \$200K	>\$200K
<i>States With No Income Tax</i>				
Florida	59.4	14.8%	17.5%	19.9%
Texas	47.9	7.3	6.0	6.6
Washington	33.0	2.6	2.6	2.6
Subtotal		24.7	26.2	29.1
<i>States With An Income Tax</i>				
California	46.2	6.2	5.5	6.7
Arizona	43.6	4.6	5.0	4.3
North Carolina	42.1	3.7	4.4	4.2
New York	23.3	3.6	2.8	3.7
Georgia	47.8	3.5	3.0	2.6
Pennsylvania	28.4	2.8	2.8	2.8
Virginia	36.8	2.6	3.1	2.9
Subtotal		26.8	26.7	27.2
Total		51.5	52.9	56.3
"Warm"		42.6	44.7	47.2
"Cold"		8.9	8.2	9.1

Pennsylvania, and Washington) have average winter temperatures below 35 degrees.

During 2012-14, 24.7% of movers 65 or older with incomes under \$100,000 migrated to no-income-tax Florida, Texas, or Washington (see underlined numbers in Table 4). A slightly larger percentage (26.8%) moved to one of the other seven states with the tax.

However, as income rises, larger percentages of movers chose the no-income-tax states. Among retirees with incomes between \$100,000 and \$200,000, the no-tax states claimed 26.2% of the movers (boxed numbers), compared to 24.7% in the lower-income group. The states with an income tax claimed 26.7%, about the same as in the lower-income group.

Among those with the highest incomes—over \$200,000—a much larger percentage (29.1%) chose either Florida, Texas, or Washington (shaded boxes). The percentage opting for one of the other seven remained near 27%. In other words, as incomes rose, seniors were more likely to choose to retire to a state with no income tax.

In comparing “warm” states with “cold” states, a similar pattern emerges (see bottom of Table 4). The percentage of retirees moving to the “warm” states rises from 42.6% for those with incomes under \$100,000 to 44.7% for those with incomes between \$100,000 and \$200,000, and to 47.2% for those with

incomes above \$200,000. Percentages varied little among “cold” states.

These figures prompt at least two questions for state leaders and policymakers. First, what matters more for high-income seniors, income taxes or weather? Are seniors who move doing so because of weather, and then choosing a specific “warm” state based on other factors, such as income taxes. If temperature is the primary motivator, reducing income taxes on seniors here will not materially affect the state’s continuing loss of this population.

Alternatively, are seniors moving primarily due to income taxes, and then choosing low-tax states that are also warm states? If so, then reducing income taxes might help retain this demographic.

Retaining high-income seniors provides benefits to the state, including investment in small businesses, charitable giving, and tax revenues to fund state and local services. Unfortunately, such a change cannot help Wisconsin attract the younger workers needed to address its labor and skill shortages.

## SUMMARY

Over the next 20 years, Wisconsin will need to import nearly 300,000 people from other states just to maintain its workforce. Recent losses from migration make reaching that goal a challenge.

Wisconsin’s climate is not conducive to attracting workers from other states. That said, high-quality schools, a world-class university, and a reasonable cost of living make the state attractive. However, relatively low wages, particularly for jobs requiring a college degree, limit the state’s appeal for those most likely to move. □

## IRS Migration Data

The data used in this report are from federal income tax filings and are based on addresses of filers from year to year. The IRS reports the number of filers (approximates the number of families), the number of exemptions claimed (approximates the number of people), and total adjusted gross income (AGI) for those who: did not move; moved between counties; moved between states; and moved internationally. Average incomes reported here are family incomes (AGI per filer).

For a variety of reasons, some people do not file federal income taxes and are not included in the data. Thus, the figures reported here may slightly understate migration.

## MOVING BY COUNTY

Wisconsinites clearly relocate to other states less than others do. That the state ranked 47th nationally is clear confirmation.

However, people also move within their home states. And, as it turns out, Wisconsin residents move from county to county within the state at a rate similar to the U.S. average. During 2012-14, 3.0% of state residents moved to another of our 72 counties. Nationally, the rate was 3.2%.

State leaders generally do not concern themselves with intercounty movement; their focus is on interstate relocation. However, while counties lose individuals or families to other states, they also lose them to other counties within the state. Net migration at the county level accounts for both and can be a local issue of economic consequence.

### People

Much of the inter-county migration is regional: People typically move to a neighboring county. These moves are less significant than leaving a region or state for local economic activity is not greatly affected.

Nevertheless, local migration patterns say something about residential preferences. When major outmigration from one county to another occurs, local officials should try to assess and act upon reasons for moving.

During the 2012-14 period, the two counties losing the most people (net) to migration were—not surprisingly—the two most populous ones (see Table 5). In Milwaukee County, 22,224 more people left than moved there from other Wisconsin counties or states. Half (11,139) of the total was a net loss to neighboring Racine, Ozaukee, Washington, and Waukesha counties. Milwaukee County lost a total of 2,492 more people than it gained from the retiree destinations of Florida and Arizona.

Net, Dane County lost 2,110 people due to migration. Some of the loss may be a result of the university. Many U.W. Madison students leave the state or return to their hometown upon graduation. Unfortunately, the migration data used here are based on income tax filing, and many students do not need to file, or file using their home address. In those cases, they would not be reported as movers.

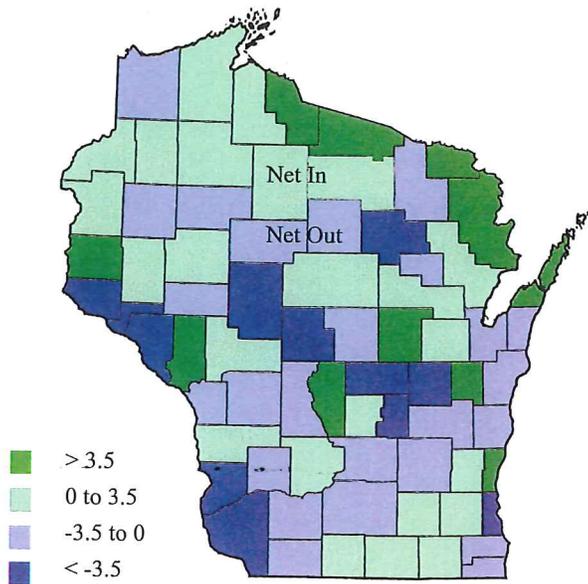
Like Milwaukee, much of Dane County's net losses were to neighbors: 810 (38%) of the 2,110 net loss was to Columbia, Green, Jefferson, Rock, and Sauk counties.

The experiences of Milwaukee and Dane counties were not unusual in one aspect: Net outflows occurred in many of the state's most populous counties. Net, Winnebago County lost 1,543 people; Kenosha County lost 947; Brown shed 451; and Racine, 358.

**Table 5: Net Migration by County**  
Net People and Income (\$ Thousands) From Migration, 2012-14

County	Num.	Income	County	Num.	Income	County	Num.	Income	County	Num.	Income
Adams	370	\$17,800	Florence	112	\$3,511	Marathon	151	-\$42,760	Rusk	-96	\$5,530
Ashland	2	-999	Fond du Lac	-146	-24,375	Marquette	542	11,614	St. Croix	1,364	85,546
Barron	-308	2,123	Forest	-47	4,074	Marquette	0	16,716	Sauk	426	15,170
Bayfield	132	13,352	Grant	-497	-41,782	Menominee	-24	2,113	Sawyer	128	10,661
Brown	-451	-72,445	Green	96	-4,209	Milwaukee	-22,224	-927,199	Shawano	121	7,014
Buffalo	-244	-6,453	Green Lake	-190	-16,346	Monroe	-115	-6,540	Sheboygan	-610	-27,244
Burnett	91	16,278	Iowa	-186	-257	Oconto	226	20,800	Taylor	-56	-9,791
Calumet	831	23,092	Iron	173	6,975	Oneida	190	98,745	Trempealeau	486	1,723
Chippewa	241	30,754	Jackson	10	2,086	Outagamie	905	-4,776	Vernon	47	5,832
Clark	-460	-10,593	Jefferson	302	-3,121	Ozaukee	946	-34,796	Vilas	787	43,486
Columbia	-77	-22,938	Juneau	-131	9,947	Pepin	-89	957	Walworth	112	69,260
Crawford	-153	6,720	Kenosha	-947	-45,909	Pierce	-418	-12,407	Washburn	37	10,018
Dane	-2,110	-153,343	Kewaunee	-109	-10,623	Polk	234	5,327	Washington	886	-51,204
Dodge	-88	-22,370	La Crosse	-546	-21,216	Portage	-596	-9,423	Waukesha	3,204	-31,652
Door	387	43,857	Lafayette	-152	-4,509	Price	106	-5,440	Waupaca	482	14,558
Douglas	-157	-1,472	Langlade	-198	2,769	Racine	-358	-61,186	Wauwasha	-222	9,278
Dunn	31	-14,657	Lincoln	-36	1,225	Richland	-72	-471	Winnebago	-1,543	-66,065
Eau Claire	-702	-54,566	Manitowoc	-525	-47,041	Rock	33	-21,619	Wood	-1,111	-53,514

**Figure 6: State Migration Patterns Mixed**  
 Net Migration Per 1,000 Population, by County, 2012-14



Waukesha (+3,204) and St. Croix (+1,364) were the only counties adding more than 1,000 residents. Other counties with relatively large net gains were two bordering Milwaukee: Ozaukee (+946) and Washington (+886). In the Fox River Valley, Outagamie (+905) and Calumet (+831) counties were net gainers.

Probably the biggest surprise among the top 10 counties gaining residents was Vilas, which added 787 people from migration. Sparsely populated, Vilas is among Wisconsin's northern-most counties. It gained 450 people from within the state and 337 from elsewhere.

*Net Rates.* To compare counties with different populations, a net migration rate is obtained by dividing total net migration in a county by its population. To be consistent with the state migration rates (page three), net rates are reported per 1,000 residents.

A few unexpected results emerge. First, not only did many of Wisconsin's northern counties gain residents from migration, they had some of the highest net migration rates. Vilas (14.2 net migrants per 1,000 residents), Iron (11.6), and Florence (10.0) counties ranked 1-2-3 among the 72 counties. Marinette and Door counties were also in the top 10.

Milwaukee County not only lost the most people, its net rate (-9.6) was the lowest of any county. Buf-

falo County (-6.8) on the Mississippi River was second lowest.

Most southwestern counties also lost people. Grant (-4.0) and Crawford (-3.8) counties had some of the lowest net migration rates.

### Income Movements

Although income movement in the state is not as important as income leaving the state, these patterns do inform the migration discussion.

Just as it lost the most people, Milwaukee County also lost the most income from migration. Over the three years studied, nearly \$1 billion in income left the county. Fortunately for the region, about \$420 million of that moved from Milwaukee to a neighboring county.

Dane was the only other county with a net income loss of more than \$100 million. Other relatively large income losses occurred in Brown (-\$72 million), Winnebago (-\$66 million), and Racine (-\$61 million) counties.

Eleven counties gained people but lost income due to migration, including Outagamie, Ozaukee, Washington, and Waukesha. This occurs when average incomes of those leaving exceed incomes of those arriving. One possible explanation is high-income retirees leaving these counties for Florida and other southern states.

Another nine counties had the opposite experience—losing people but gaining income. These counties (Barron, Crawford, Forest, Juneau, Langlade, Lincoln, Menominee, Pepin, and Rusk) are sparsely populated, and both the population losses and income gains were small.

### Summary

County officials can do little to stem the tide of residents leaving for other states. However, they should be cognizant of those moves, as well as migration to other counties in the state. Identifying destinations of those moving out of a county and origins of those moving in can help assess county strengths to be enhanced and weaknesses to be remedied. □

### DATA SOURCES:

Federal Reserve Bank of St. Louis; Internal Revenue Service; Journal of Urban Economics; National Bureau of Economic Research; Wisconsin Department of Administration.



### Wisconsin Taxpayers Alliance

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### WISTAX NOTES

■ **Property Values Rise 3%.** Total equalized property values rose 3.0% this year, reaching \$505.1 billion. Values statewide remain 1.8% below their 2008 peak of \$514.4 billion (see chart). This year's gain was the third consecutive, following an unprecedented five years of decline. Recent increases have been modest, averaging 2.6% per year during 2014-16. That rate of increase was about a third of the 7.6% average during 2000-08 (see Focus #15).

Equalized property values are Wisconsin Department of Revenue estimates of the fair market value of taxable property in the state. In conjunction with tax levies, these values are used by local governments to set local property tax rates.

■ **More Teachers and Administrators.** In 2014-15, Wisconsin's 424 public school districts employed 71,579 full-time equivalent (FTE) administrators and licensed staff, an increase of 1,166, or 1.7%, from 2013-14. Since the 2009 peak of 72,914, the number of staff is down 1.8%.

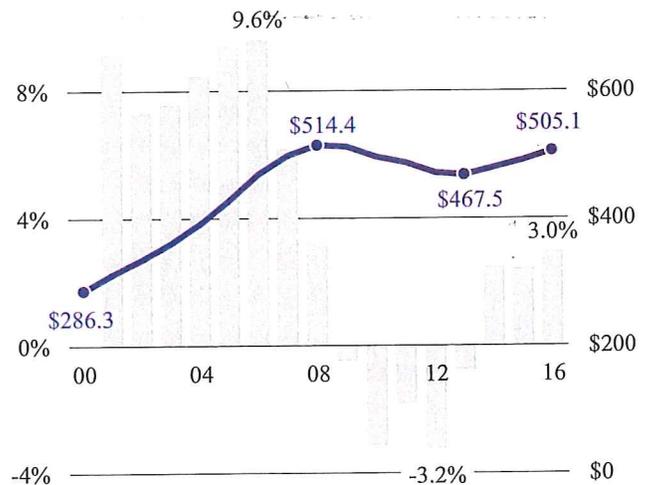
FTE teacher counts rose 1.1% from 58,145 in 2013-14 to 58,787 in 2014-15. Since 2009, however, the number of teachers has declined 2.5%. Administrator numbers increased 4.4% over the year to 6,567, the largest number on record. They are up 3.9% since 2009.

Student counts put these numbers in context. The number of FTE students declined 2,571 (0.3%) in 2014-15, from 857,345 to 854,774. Since 2009, enrollment has dropped 0.7%.

The statewide student-teacher ratio stood at 14.5 in 2015, down from 14.7 in the year prior, but slightly higher than the 14.3 recorded in 2009.

### Equalized Property Values Grow, Remain Below Peak

Statewide Equalized Values and Annual Changes, 2000-16



■ **WISTAX Wins National Award.** The Governmental Research Association (GRA), a national association of public policy research organizations, recently gave its "Most Distinguished Research" award to the Wisconsin Taxpayers Alliance for its 2015 study of Wisconsin's prevailing wage law. The report used various innovative approaches to show how the state's calculation of prevailing wages was flawed. □

### In FOCUS . . . recently in our biweekly newsletter

- Final property tax numbers for 2016 (#9-16)
- They're off: State legislative candidates set for August primary, fall general (#10-16)
- Historic July 4 speeches: Presidents Roosevelt and Reagan (#11-16)



September 12, 2016

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## **Local Government Leaders Announce Historic Statewide Event**

*'Turnout for Transportation' to highlight need for a sustainable transportation solution*

MADISON – Leaders of Wisconsin's three local governmental associations announce an unprecedented, statewide event – Turnout for Transportation, **September 29<sup>th</sup> at 7 p.m.** The event will involve meetings in 71 counties, with a joint meeting for the counties of Ashland and Bayfield. County, city, town and village officials plus members of the business community and the public will have a forum for their voices to be heard regarding critical projects and services in each region and the need for the state to find a sustainable solution to Wisconsin's transportation challenge.

"For the counties, towns, cities and villages all to get together on the same night, on the same topic has never been done before. This is absolutely a first of its kind event," said Jerry Deschane, executive director of the League of Wisconsin Municipalities. "This event puts a spotlight on what our members know: Wisconsin's transportation system is a system. It's not just about town and county roads, city streets and interstates. It's about how all aspects of our transportation system work together."

**Turnout for Transportation** is part of the Transportation Development Association's *Just Fix It* campaign that started last year. The purpose of the campaign is to facilitate a statewide dialogue about the condition of Wisconsin's infrastructure and the impact on Wisconsin residents and businesses.

"If our state is to be successful, our private sector needs to be successful," said Mark O'Connell, executive director of the Wisconsin Counties Association. "One of the primary components of a successful private sector is a high-functioning, well-maintained and safe transportation infrastructure."

**--CONTINUED--**

**PAGE 2-2-2 – TURNOUT FOR TRANSPORTATION (*continued*)**

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Executive Director Mike Koles of the Wisconsin Towns Association added, “We need to make sure we get the maximum benefit from every taxpayer dollar, and believe me we do. But now, a lack of resources is leading to inefficiencies. If we don’t have the resources to invest in a road maintenance plan that allows the road to last 30-40 years, that is not a wise use of taxpayer funds.”

To date, more than 365 local governments have passed a resolution urging state elected officials to support a sustainable solution to Wisconsin’s transportation challenge.

“It’s up to all of us to work together to meet our transportation challenge,” concluded O’Connell. “We are hopeful Wisconsin will reach a long-term, comprehensive solution.”

**###**

**NOTES:**

More information about Turnout for Transportation, including the 71 meeting locations, is available at [www.TurnoutforTransportation.com](http://www.TurnoutforTransportation.com).

View a map and listing of local governments that have passed the transportation resolution at <http://www.tdawisconsin.org/1486/locals-urge-governor-legislature-just-fix/>.