



WASHINGTON COUNTY

NEXT GENERATION HOUSING
Framework 2.0



**WASHINGTON
COUNTY** 1836
WISCONSIN



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Framework Review / Approval

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- Next Generation Housing Committee Review and Approval: 7/15/2024
- Washington County Executive Committee Review and Approval: 7/17/2024

“I’m extremely excited that Washington County is moving forward on the Next Generation Housing Initiative. I believe it will help many achieve homeownership while still living within their means. We just want a small, new home with a small yard to call our own. We’d finally have our own space. Everyone deserves a chance to feel proud of owning their own home. I hope someday we’ll be able to feel that sense of accomplishment! Thank you for creating this initiative as it could help pave the way for a new housing revolution that’s been sorely needed in Wisconsin.”

- City of Hartford resident

Definitions

Builder	An entity that constructs homes within Next Generation Housing developments or projects.
Infill Development	A Next Generation Housing project that consists of owner-occupied homes/units and are constructed within the requirements of the NGH Initiative that is not a NGH Pilot Development. This could consist of a small subdivision or a part of a larger development.
Developer	An entity that will be developing a site within the Next Generation Housing parameters.
Development Agreement	A voluntary contract between a local jurisdiction and a private entity that details the obligations of both parties and specifies the standards and conditions that will govern development of the property.
Infrastructure	The construction, installation, or development of public utilities or energy distribution in a NGH development. This can include but is not limited to roads, sewer, water, sidewalks, grading, WE Energies.
Memorandum of Agreement (MOA)	A signed voluntary agreement between the County and participating entity that outlines the Next Generation Housing
Multi-Family	An owner-occupied housing unit comprised of three units or more that follows state code. This could be owner-occupied rowhouse, town house, condominium or manufactured building.
Next Generation Housing (NGH)	A Washington County initiative that aims at creating more attainably priced housing.
Next Generation Housing Committee/Coalition (NGHC)	A Washington County advisory committee of local government representatives, Washington County Board Supervisors, economic development entities, Chambers of Commerce, and the Department of Workforce Development that will guide the Next Generation Housing Initiative and provide advisory recommendations to the Washington County Executive Committee.

Owner-Occupied Housing

A dwelling where the occupant owns the home in which they live and holds the title. This can be a single-family house, townhouse or condominium and is their primary residence.

Partnership

Participating local governments that have an executed Memorandum of Agreement in place with Washington County.

Pilot Developments

A development within Washington County that will construct owner-occupied housing through the Next Generation Housing Initiative. This development can be in partnership between a local government and a private developer/builder or the development can be lead by the local government.

Project Management Team (PMT)

A group of individuals that have a role in the success of a NGH development or project. Entities involved include Washington County Community Development staff, local government representatives, and other professionals required to implement a development.

Start-Up Funds

Funding designated to Next Generation Housing projects that prepare a site for development.

Tax Increment Financing District (TID)

A financing option that allows a municipality to fund infrastructure and other improvements, through property tax revenue on newly developed property. Tax Increment Financing Districts (TIDs) describe the specific boundaries of the area.

Washington County Executive Committee

A standing committee of the Washington County Board of Supervisors made up of County Board leadership. The committee reviews and considers funding requests from the Next Generation Housing Committee. The Washington County Executive Committee has final authority to make all funding decisions on behalf of the program. All decisions are final.

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Introduction to NGH 2.0

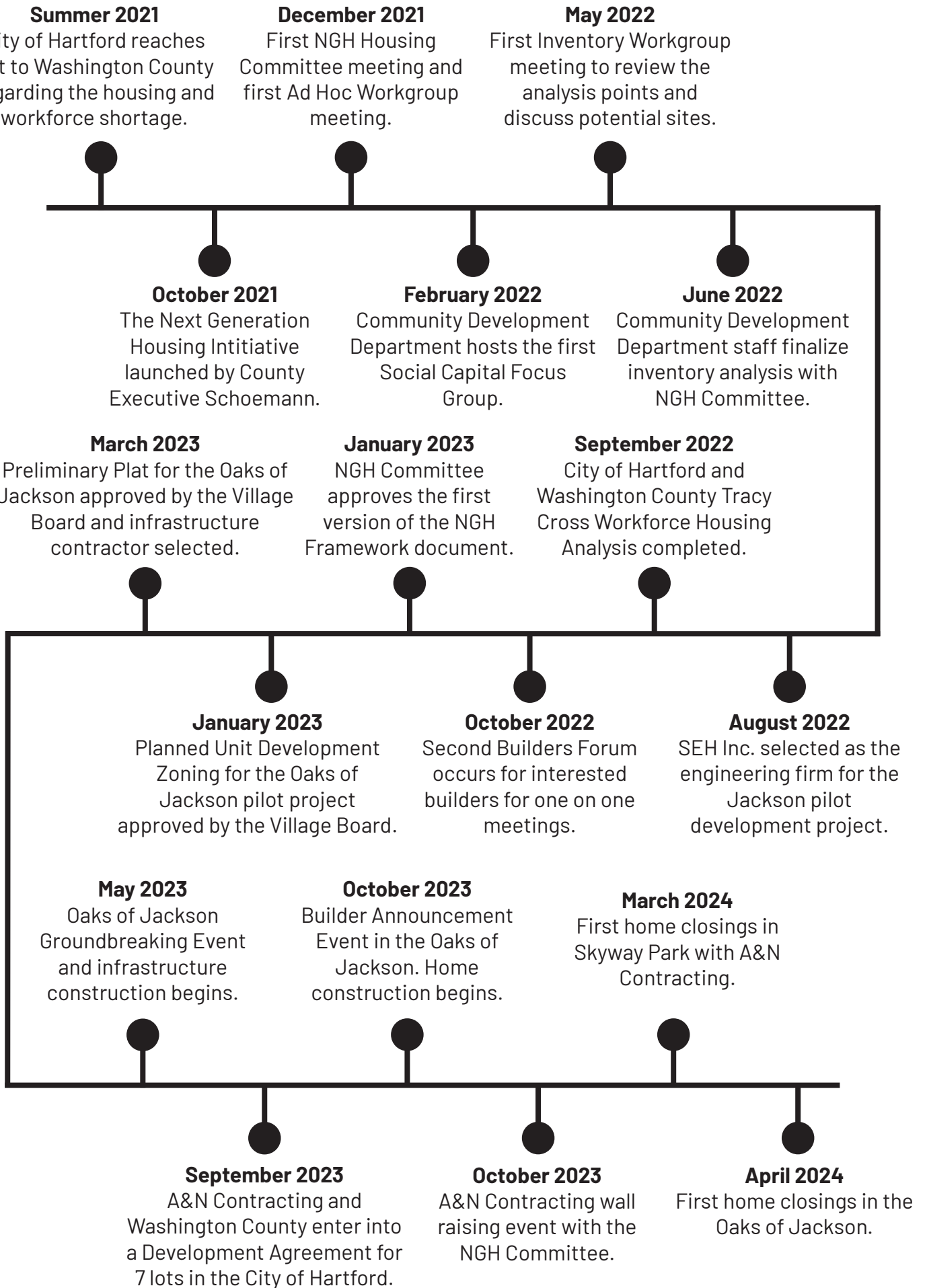
The Next Generation Housing (NGH) Initiative was launched on October 7, 2021 as part of the Washington County Our Great Community Campaign. The Washington County Executive, Josh Schoemann, recognized the need for high quality attainable housing and established this Initiative to create more owner-occupied housing in Washington County.

In January 2023, the Next Generation Housing Framework was approved by the County Executive Committee which guided the development of over 100 new owner-occupied housing units in the Oaks of Jackson, Village of Jackson and Skyway Park, City of Hartford. The original NGH price points required that 75% of owner-occupied housing units sell for under \$320,000 and 100% sell under \$420,000, including home and lot/site. For multi-family NGH developments, builders could opt to have all owner-occupied units sell for under \$345,000. Since these price points were established in 2021, the increasing costs of land acquisition, home construction, and other market factors have made it difficult for builders to reach the \$320,000 price point.

In January 2024, a Price Point Analysis was completed by the Community Development Department which evaluated interest rates and incomes, housing studies, deed restrictions, land costs and property values, builder cost increases, and nationwide housing data. This Next Generation Housing 2.0 Framework evolved out of the need to adjust to market trends and provide new funding mechanisms to reach our goal. Next Generation Housing 2.0 provides updated price points and additional funding mechanisms for local governments, developers and builders to achieve our goal of creating 1000 new owner-occupied housing units with 40% sold under \$340,000, 80% sold under \$360,000, and 100% sold under \$420,000, including home and lot/site, by 2032. For multi-family only NGH developments, builders can opt to set all owner-occupied dwelling unit sale prices at under \$350,000.

What started as an idea has gained momentum throughout the County, with support by local governments, businesses, chambers of commerce, lenders, realtors, builders, non-profit organizations, and residents interested in obtaining reasonably priced homes in the communities in which they work. The Community Development Department has been working diligently with the Next Generation Housing Committee, the County Executive Team, builders, municipalities, and other important stakeholders (including bankers, realtors, developers, and attorneys) to design the foundational structure of Next Generation Housing and establish the Framework for implementation. The Framework details how Washington County and partnering local governments will achieve the goal of providing housing opportunities for working individuals and families to grow their roots in the County and build equity through home ownership. From establishing the potential development sites through the inventory analysis, reaching the first home sales in 2024, and creating a sustainable funding source for the Initiative, this Framework is a major steppingstone in achieving Next Generation Housing.

Next Generation Housing Timeline



Public Purpose

Community leaders, employers, and employees have long expressed concerns over the perceived housing inventory and affordability in Washington County. The workforce shortage, compounded with the high cost of living within Washington County, is stretching the workforce thin. With rising home and construction costs, the workforce is struggling to save money and purchase homes.

A 2022 study by Tracy Cross & Associates, based on income, found that there is a disconnect between the housing demand and new residential construction for sale: ([View the full Tracy Cross Study](#))

- The study identified the demand for new construction housing in Washington County is largely concentrated at price points below \$350,000, which corresponds with the mainstream / workforce of the market. However, the majority of new construction offerings in the market are concentrated at prices above \$350,000.
- This large disparity between new construction price points and income reflects the reality that a different approach must be taken for the introduction of new for sale housing in Washington County. This new approach requires all stakeholders working collaboratively to develop creative and innovative solutions.

A CURRENT DISCONNECT IN WASHINGTON COUNTY'S FOR SALE SECTOR

Price Range	For Sale Housing Demand (Based Upon Current Incomes)		Qualitative Distribution of New Construction Residential Closings ⁽¹⁾	
	Number	Percent	Number	Percent
Under \$200,000	38	9.0	---	---
200,000 - 249,999	80	19.0	8	3.5
250,000 - 299,999	71	16.9	26	11.5
300,000 - 349,999	46	11.0	31	13.7
350,000 - 399,999	39	9.3	51	22.5
400,000 - 449,999	30	7.1	50	22.0
450,000 - 499,999	25	6.0	29	12.8
500,000 - 549,999	19	4.5	10	4.4
550,000 - 599,999	16	3.8	6	2.6
600,000 & Above	56	13.3	16	7.0
Total	420	100.0	227	100.0
Median	----- \$323,181 -----		----- \$397,332 -----	

⁽¹⁾ Last 18 months of closings among new townhome/duplex/condominium and single family units (annualized).

Source: Tracy Cross & Associates, Inc. and Southeast Wisconsin Multiple Listing Service

Figure 1 Image of the Current Disconnect in Washington County's for Sale Sector.

Other research has identified the need for increased supply of mainstream housing:

- Neighborhoods with owner presence, having a variety of owner-occupied housing types thrive and allow entry level homeowners to build wealth which assists in upward mobility.¹
- The total number of jobs within Washington County is expected to increase by about 37% by the year 2050, as stated in the Multi-Jurisdictional Comprehensive Plan for Washington County: 2050. To account for the anticipated growth of jobs in the community, housing affordability concerns are a top priority.

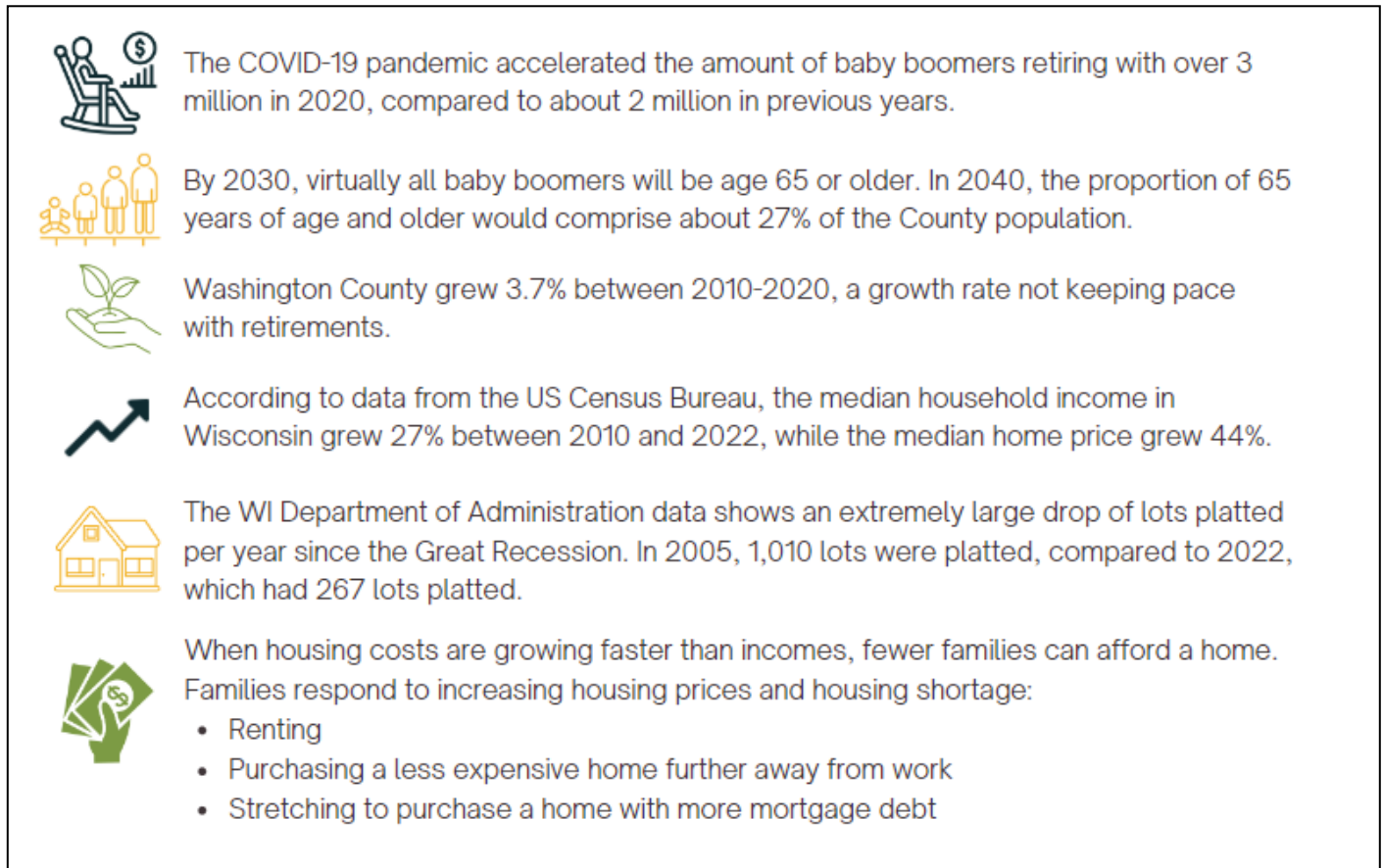


Figure 2 Reasons why Next Generation Housing is needed.²

¹ Howard Husock, The Poor Side of Town: and Why We Need It, September 2021

² EMSI, The Demographic Drought, 2021; Wisconsin Department of Administration, 2024; Wisconsin Realtors Association, Falling Behind, 2021; US Census Bureau

Housing Affordability

Next Generation Housing 2.0 strives to increase the housing supply in the missing middle housing market with a goal of providing quality homes within 30% of the median household income. The 2022 median household income in Washington County was \$91,915.³ Working with a local lender, the following was determined based on a conventional 30-year fixed rate mortgage at 6.500% with a 5% down payment, the housing ratio of 30% of gross monthly income, a minimum credit score of 740 and includes private mortgage insurance.

- Purchase price of \$250,000 – requires a household income of \$80,040/year
- Purchase price of \$275,000 - requires a household income of \$87,251/year
- Purchase price of \$300,000 – requires a household income of \$96,055/year
- Purchase price of \$325,000 – requires a household income of \$103,460/year
- Purchase price of \$340,000 – requires a household income of \$107,663/year
- Purchase price of \$350,000 – requires a household income of \$111,065/year
- Purchase price of \$375,000 – requires a household income of \$118,669/year

The following was determined based on a conventional 30-year fixed rate mortgage at 6.500% with a 5% down payment, the housing ratio of 36% of gross monthly income, a minimum credit score of 740 and includes private mortgage insurance.

- Purchase price of \$250,000 – requires a household income of \$66,600/year
- Purchase price of \$275,000 – requires a household income of \$72,720/year
- Purchase price of \$300,000 – requires a household income of \$80,400/year
- Purchase price of \$325,000 – requires a household income of \$86,208/year
- Purchase price of \$340,000 – requires a household income of \$89,712/year
- Purchase price of \$350,000 – requires a household income of \$92,544/year
- Purchase price of \$375,000 – requires a household income of \$98,892/year

As of January 2024, the dual income household making \$25 per hour will make a gross annual income of \$104,000. At 30% of household income, they could afford a home just under \$340,000 (between \$325,000 and \$340,000).

The Next Generation Housing Committee will complete a bi-annual review of the price points and may recommend to the Washington County Executive Committee an adjustment to the price limits based on current market trends.

³ US Census Bureau American Community Survey 2018-2022 5-year estimates (Table S1901)

NGH Goals

On October 7, 2021, the Washington County Executive announced the Our Great Community Campaign and the creation of the Next Generation Housing Initiative and Coalition. The Our Great Community Campaign is aimed at preserving and promoting Washington County values and the authentic quality of life within the community. The vision for the Our Great Community Campaign is a place where businesses and individuals are connected to one another through trusting networks and common values in service to each other.

Next Generation Housing Initiative

Navigating housing opportunities, providing attainable housing options and building a diverse housing population.

Goals

- Providing 1,000 new owner-occupied dwelling units in Next Generation Housing developments with 40% being sold for under \$340,000, 80% under \$360,000, and 100% under \$420,000, including home and lot/site, by 2032.
- Overcoming barriers to home ownership for our next generation.
- Satisfying the basic need of obtaining quality homes within 30% of household income.

The Next Generation Housing Initiative continues to change lives and make a positive impact in Washington County with a wide range of benefits related to *Economic Growth & Vitality* and *Safe and Secure Community Goals* by creating and establishing housing developments that allow the workforce to grow roots and establish strong relationships within the community. The Next Generation Housing Initiative seeks to overcome barriers to home ownership through the deployment of County funds and resources.

Key Components

Next Generation Housing Price Points have been adjusted based on increasing costs of land acquisition, home construction, and other market factors. Next Generation Housing 2.0 Framework evolved out of the need to adjust to market trends and provide new funding mechanisms to reach our goal. The following outlines key components of NGH 2.0:

Prohibited Use of Eminent Domain:

No land shall be utilized for Next Generation Housing that has been obtained through eminent domain by a local government, Washington County or State of Wisconsin.

Price Point Requirement:

- All NGH developments shall provide owner-occupied dwelling units with 40% sold under \$340,000, 80% under \$360,000, and 100% under \$420,000, including home and lot/site.

- For Next Generation Housing developments comprised of only multi-family owner-occupied units, it may be difficult to provide variations of amenities and floor plans. Therefore, multi-family only Next Generation Housing developments may opt to set 100% of owner-occupied dwelling unit sale prices at under \$350,000. Builders constructing multi-family only developments have the option to utilize the original tiered Next Generation Housing price points. This provides two pricing strategies for multi-family only developments.
- These price points apply to all development scenarios outlined below.
- At the discretion of the Washington County Executive Committee with review from the Next Generation Housing Committee, there may be consideration for minor exceptions to the Next Generation Housing price points. This will allow for a discussion of minor variations in the allocation of price points within the Next Generation Housing Initiative on a project-by-project basis. A written explanation shall be provided by the requesting entity describing the unusual circumstances, unique conditions of the property, and unnecessary hardship in the infrastructure development or home construction that would warrant the consideration of price point exceptions. The County Community Development Department will review the request and make the initial determination to move the request forward for committee review and consideration.

\$20,000 NGH Fund Incentive with Lien:

- Washington County is providing \$7.65 million for Next Generation Housing developments through the Next Generation Housing Fund. Funds will be allocated based on a maximum of \$20,000/owner-occupied dwelling unit. This Incentive to the local government, developer or builder acts as a 0% loan for land acquisition, engineering studies, infrastructure construction and other eligible expenses. See Project Eligibility Section below.
- A \$20,000 lien will be recorded on each owner-occupied dwelling unit at the time the land is transferred to the builder/developer. The lien will be satisfied, and funds returned to the County as part of the home closing. Funds returned to the County will fund future Next Generation Housing developments. Exhibit C details the process for the property lien.
- Sale price of homes shall include the \$20,000 NGH Fund Incentive. For example, builders must construct a home/lot package for \$20,000 less than the sale price:
 - Home/Lot Package <\$320,000 + Co. NGH \$20,000 = <\$340,000 Sale Price
 - Home/Lot Package <\$340,000 + Co. NGH \$20,000 = <\$360,000 Sale Price
 - Home/Lot Package <\$400,000 + Co. NGH \$20,000 = <\$420,000 Sale Price

Owner Occupancy Requirement:

- All Next Generation Housing dwelling units shall be owner-occupied
- All Next Generation Housing developments shall have a recorded Declaration of Protective Covenants that identifies that all homes remain owner-occupied in perpetuity.
- A model Next Generation Housing Declaration of Protective Covenants will be available for reference.
- An accessory dwelling unit located in a primary owner-occupied property is allowed.

Deed Restriction to Prevent Flip for Profit:

- In an effort to provide homes within the price point limits, it is anticipated that the sale prices may be under the fair market value based on discounts provided by the County, developers, builders, or local governments.
- It is reasonable to establish and require a mechanism to prevent “flip for profit” for a period of time after first owner occupancy. Each Next Generation Housing owner-occupied dwelling unit sold for under fair market value shall have a five-year deed restriction placed on the property at time of sale to the first homeowner after occupancy.
- As long as the original homeowner owns title to the property for a minimum of five years, there would be no restrictions. However, if the title changes hands in the first five years, the original or new owner of the home would be required to repay Washington County a portion of the profit of the sale or transfer. This amount is known as the Repayment Obligation.
- The Repayment Obligation is a percentage of the difference between the “Purchase Price” of the property and the “Fair Market Value” of the property. The Purchase Price of the property is recorded in the original purchase agreement between the homeowner and developer/builder. The Fair Market Value of the property is determined by a certified real estate appraisal at the time of purchase.
- The repayment percentages used to determine the Repayment Obligation are as follows:
 - Year 1 = 100%
 - Year 2 = 80%
 - Year 3 = 60%
 - Year 4 = 40%
 - Year 5 = 20%
- If a property is transferred in the first five years due to foreclosure or similar action, the Deed Restriction will terminate and will not apply to the purchaser of the property.
- Any Repayment Obligation returned to the County shall be returned to the developer, builder, local government or Next Generation Housing Fund as outlined in the deed restriction or repayment agreement.
- The deed restriction and repayment structure will be defined for each Next Generation Housing development by Washington County in partnership with the local government, developer or builder who provided the discounts. Washington County shall receive a minimum of 10% of the deed restriction amount to be paid back to the Next Generation Housing Fund.

100% Core Construction Permit Fee Incentive:

- Local governments, Developers or builders constructing Next Generation Housing owner-occupied units outside of a tax increment financing district (TID) or within a TID but not utilizing increment to reimburse the NGH Fund Incentive of up to \$20,000 per owner-occupied dwelling unit may be eligible for an Incentive that provides for 100% (up to \$6,000 per owner – occupied unit) of local government permit and inspection fees required for the safe and material construction of residential dwelling units. See Program Eligibility section for list of fees that apply.
- Washington County is providing \$600,000 through the Next Generation Housing Fund.

- This will be piloted on no more than three projects to track success before launching as a permanent program.
- Funds provided for the 100% of Core Construction Permit Fee Incentive will be part of a deed restriction placed on the home and earned over 5 years by the first homebuyer. If the home is sold within the first 5 years, a portion of the deed restriction is paid back to the County and funds are returned to the Next Generation Housing Fund. This deed restriction will have the same payback structure as currently outlined above.

Utilizing TID Increment:

- Washington County may negotiate with a local government and developer to utilize Tax Increment Financing District (TID) increment for the development of Next Generation Housing.
- A portion of the TID increment will reimburse the County Next Generation Housing Fund Incentive of \$20,000 per owner-occupied dwelling unit.
- For providing funds ahead of available increment, the TID shall provide annual payments of principal and interest according to the schedule and terms detailed within the negotiated Development and Intergovernmental Agreements.
- No NGH lien as described above would be placed on the dwelling units.
- The site would not be eligible to participate in the 100% payment of Core Construction Permit Fees.

Development Scenarios

Below are three different Next Generation Housing development scenarios that outline how the above Key Components can be utilized.

Scenario 1 – Local Government or Private Developer / Builder Not Utilizing TID Increment

- This scenario involves a Next Generation Housing development not utilizing TID Increment to reimburse the NGH Fund Incentive of up to \$20,000 per owner-occupied dwelling unit:
 - NGH Price Points apply
 - Owner-Occupancy Requirements apply
 - Eligible for \$20,000 NGH Fund Incentive – NGH Lien applies
 - Eligible for 100% Core Construction Permit Fee Incentive – NGH Deed Restriction applies for each unit
 - Eligible for NGH Deed Restriction based on local government, developer, or builder substantiated discounts to homebuyers
 - No lands shall be utilized for Next Generation Housing that have been obtained through eminent domain by a local government, Washington County or State of Wisconsin.

Scenario 2 – NGH \$20,000 Incentive Paid Back by TID Increment

- This scenario involves a Next Generation Housing development located within a TID and utilizing TID increment to reimburse the NGH Fund Incentive of up to \$20,000 per owner-occupied dwelling unit:
 - NGH Price Points apply
 - Owner-Occupancy Requirements apply
 - A portion of the TID increment will reimburse the County Next Generation Housing Fund Incentive of \$20,000 per owner-occupied dwelling unit.
 - For providing funds ahead of available increment, the TID shall provide annual payments of principal and interest according to the schedule and terms detailed within the negotiated Development and Intergovernmental Agreements.
 - Not eligible for 100% Core Construction Permit Fee Incentive
 - Deed Restriction can be utilized if County, local government, developer or builder substantiates direct price reduction discounts provided to homeowner
 - No NGH Lien necessary
 - No lands shall be utilized for Next Generation Housing that have been obtained through eminent domain by a local government, Washington County or State of Wisconsin.

Scenario 3 – County Owned Land

- This scenario involves a Next Generation Housing development located on County owned land. Washington County may purchase land with County Board approval to contribute to Next Generation Housing:
 - NGH Price Points apply
 - Owner-Occupancy Requirements apply
 - The value of the discounted land will be part of a Deed Restriction and earned over five years by the first homebuyer. The Deed Restriction will have the same structure as outlined above. If the home is sold within the first five years, a portion of the Deed Restriction is paid back to the County and funds returned to the Next Generation Housing Fund.
 - The development agreement between the County and the builders/developers will have provisions that the discounted land savings be passed on to the homebuyer. Appraisals will be completed by the County after land is subdivided to determine discount/deed restriction amount.
 - Not eligible for 100% Core Construction Permit Fee Incentive
 - Not eligible for \$20,000 NGH Fund Incentive
 - No NGH Lien necessary
 - No lands shall be utilized for Next Generation Housing that have been obtained through eminent domain by a local government, Washington County or State of Wisconsin.

Funding Background

Washington County is providing \$8.25 million for Next Generation Housing developments through the Next Generation Housing Fund. The following summarizes the Next Generation Housing Fund creation and background:

- The Washington County Board of Supervisors adopted 2022 Resolution 22 (Attachment A), which approved a \$7.5 million transfer from the General Fund for the Next Generation Housing Initiative.
- The United States Government passed the American Rescue Plan Act (ARPA) on March 11, 2021, establishing the Coronavirus Local Fiscal Recovery Plan, which is intended to assist local governments, including Washington County, in responding to the impact COVID-19 has had on the local community.
- Under the provisions of ARPA Washington County received \$26 million in recovery funds for economic and community recovery from the COVID-19 pandemic. ARPA guidance allows Washington County to use funds for the provision of government services to the extent of the reduction in revenues due to the COVID-19 public health emergency. These funds will be used to address the current and future issues pertaining to the declining workforce in Washington County and the declining population across the United States.
- On September 9, 2021, the Washington County Board of Supervisors adopted 2021 Resolution 43 (Attachment B), which accepted the \$26 million ARPA funds and resolved that the funds shall be administered consistent with the County's Grant Policy. Expenditures of the ARPA funds will be managed and reported through the County's financial system.
- In October 2023, a March 1, 2024 deadline was placed on the use of the NGH Startup Funds and Pilot Funds. No local governments provided evidence of substantive efforts toward the development of NGH developments. The NGH Funds that were allocated to Pilots, Initial Startup and Additional Startup have combined and are now available for any future funding requests by a local government, developer or builder.
- The Washington County Board of Supervisors approved an additional Next Generation Housing funding allocation of \$750,000 on November 8, 2023. A portion of these funds had been allocated to a project that has since declined the use of the funds. These funds are now available for any future funding requests by a local government, developer or builder.

Budget

There are two main components to the Next Generation Housing Fund available to local governments, developers and builders:

Next Generation Housing Developments - \$20,000/ODU (\$7.65 million)

- Proposed Next Generation Housing developments are eligible for funding at a maximum of \$20,000 per owner-occupied dwelling unit. Developers, builders or local governments within Washington County can request these funds.
- Funds will be allocated on a first come, first served basis with the condition that the development align with the Next Generation Housing Vision and Goals and meets the requirements outlined in this Framework.
- Eligible uses of funds include engineering services, planning services, surveying, environmental due diligence, land acquisition, infrastructure development, stormwater management, street trees, signs, lighting, municipal fees, permits and direct developer incentives.
- Each funding request will be considered through a separate approval process. Funding priorities will be determined based on development readiness as described in the Screening Checklist.
- The County and developer or builder will establish a development agreement outlining NGH requirements. If the developer is a local government, the NGH requirements will be outlined in a Memorandum of Agreement. If a local government, developer or builder is not able to satisfy the terms of the agreement, additional funding requests made by those entities may be denied at the discretion of the Washington County Executive Committee.
- ***Housing Related Planning Incentive*** – *(At discretion of the County Executive Committee)*
 - Funding requests may be made for housing studies, adding Next Generation Housing components to local zoning ordinance updates, etc. These soft cost funding requests may be funded at the discretion of the County Executive Committee if deemed in the best interest of furthering the goals of Next Generation Housing.
 - These funds if approved, are a grant to the local government.

100% Core Construction Permit Fee Incentive (\$600,000)

- Proposed Next Generation Housing developments are eligible for funding 100% of Core Construction Permit Fees, up to \$6,000 per unit, that are required for the safe and material construction of residential units. Developers, builders or local governments within Washington County can request these funds.
- Funds will be allocated on a first come, first served basis with the condition that the development align with the Next Generation Housing Vision and Goals and meets the requirements outlined in this Framework.
- See Project Eligibility section for determining fees that apply.
- Each funding request will be considered through a separate approval process. Funding priorities will be determined based on development readiness as described in the Screening Checklist.
- The County and developer or builder will establish a development agreement outlining NGH requirements. If the developer is a local government, the NGH requirements will be outlined in a Memorandum of Agreement. If a local government, developer or builder is not able to

satisfy the terms of the development agreement, additional funding requests made by those entities may be denied at the discretion of the Washington County Executive Committee.

With the goal of providing 1,000 new owner-occupied dwelling units by 2032, and the innovative mechanisms utilized in Next Generation Housing, nearly all of the \$8.25 million County Incentive will be returned to the County. These funds will be reallocated back to fund future Next Generation Housing developments. Once the goal of 1,000 new dwelling units has been achieved, the remaining funds will be made available to the Heart & Homestead Incentive.

Washington County Next Generation Housing 2.0 Fund Budget

Fund	Amount	Notes
NGH Fund for Developments	\$ 7,650,000.00	Development aligns with NGH Vision/Goals. Each request for funding is a separate approval process Funds available based on max. \$20,000/OODU -1st come/1st served*
100% Core Construction Permit Fee Incentive	\$ 600,000.00	Development aligns with NGH Vision/Goals. Each request for funding is a separate approval process. Pilot 3 NGH Developments for 100 units capped at \$6,000/NGH OODU - 1 st come/1st served
Total NGH Funds	\$ 8,250,000.00	

* These funds may be utilized for a Housing Related Planning Incentive at the discretion of the County Executive Committee

Project Eligibility

Eligible Expenses for NGH Developments– Next Generation Housing eligible expenses are limited to land, services, infrastructure and materials utilized for the creation of a Next Generation Housing development which include, but are not limited to:

- Engineering Services
- Planning Services
- Surveying
- Environmental Due Diligence
- Land Acquisition
- Infrastructure development (roads, sewer, water, sidewalks, grading, etc.)
- Direct Developer Incentives
- Stormwater management
- Street trees, signs, lighting
- Municipal fees and permits

Eligible Expenses for 100% Core Construction Permit Fee Incentive– Eligible expenses for the 100% Core Construction Permit Fee Incentive are limited to local government permit and inspection fees required for the safe and material construction of residential dwelling units as part of a Next Generation Housing development which include, but are not limited to:

- Plan review fee
- Building inspection fee
- Occupancy permit
- Electric, HVAC, Plumbing fee
- Erosion control permit
- Fire service impact fee
- Police service impact fee
- Sewer service connection fee
- Water service connection fee
- Other local government fees material to the safe construction of a residential dwelling unit

Local government fees not eligible for this Incentive include those impact and permit fees extraneous to the safe and material construction of a residential dwelling unit which include, but are not limited to:

- Park impact fee
- Deck permit fee
- Sidewalk fee
- Driveway apron/approach fee
- Mailbox fee
- Curb tree fee

Identification of the fees to be included in the 100% Core Construction Permit Fee Incentive will be determined by the County Community Development Dept. in consultation with the builder/developer and the local government. The fees to be included shall be identified in the

Screening Checklist provided to the Next Generation Housing Committee and County Executive Committee for review and approval.

Determining Initial Eligibility - All local governments, developers and builders requesting Next Generation Housing Funds are required to provide the following to the County Community Development Department to determine initial eligibility:

- Screening Checklist
- Allocation Request for Next Generation Housing Committee
- Relevant Proposals and Cost Estimates
- As applicable: land acquisition costs, site plans, house plans and concepts that confirm proposal meets Next Generation Housing Minimum Quality Standards and price points
- The County Community Development Department will determine initial eligibility on requested projects and finalize materials for Next Generation Housing Committee review.
- The Screening Checklist (See Attachment D) will be used to determine if the proposed Next Generation Housing project aligns with the vision and goals of the Next Generation Housing Initiative and therefore appropriate for Incentive by the Next Generation Housing Committee and Washington County. Eligibility will be based on the following:
 - Type of funding request
 - Potential to move a Next Generation Housing development forward
 - Alignment with definition of Next Generation Housing developments (new owner-occupied dwelling units sold in Next Generation Housing developments with 40% under \$340,000, 80% under \$360,000 and 100% under \$420,000, including home and lot/site, by 2032) or (owner-occupied multi-family only developments with units with 100% sold under \$350,000)
 - Local government, developer and/or builder has tools, time, and resources in place to make the site a priority
 - Development has existing infrastructure and is shovel ready for home building
 - Site owner readiness to housing development
 - Applicable local zoning or preliminary approvals/development agreement in principle established
 - Proposed development site substantially complies with the goals and Framework for NGH and is consistent in the development type
 - Consistency with local government future land use
 - Developer or builder current on obligations with all federal, state, and local government entities and be in good standing with the Wisconsin Department of Financial Institutions
 - Sewer and utility access
 - Consideration of complete financing
 - Other financial incentives available
 - Consideration of Site Complexity
 - Consideration of Environmental Conditions
 - Developer and/or Builder Engagement
 - Local Government, developer and/or builder contributions and support
 - If rentals are on site, willingness to subdivide property from site
 - That no land was obtained through eminent domain by a local government, Washington County or State of Wisconsin.

- If requesting 100% Core Construction Permit Fee Incentive, the identification of local government permit and inspection fees required for the safe and material construction of residential dwelling units
- For infrastructure development funding requests, all applicable preliminary plat and zoning approvals (local, County, State) and a development agreement in principle must be secured prior to requesting funding allocation and submitted to County Community Development Department. The County will request a Return on Investment (ROI) Impact Analysis to be completed by Economic Development Washington County (EDWC) prior to requesting funding allocation. This report will be shared with the Next Generation Housing Committee and County Executive Committee.

Project Approval Process

The review and approval process for Next Generation Housing funding proposals is as follows:

- Washington County Community Development Department will determine initial eligibility on requested funding proposals and finalize materials for Next Generation Housing Committee review.
- Each funding request will be considered through a separate approval process. Funding priorities will be determined based on development readiness as described in the Screening Checklist.
- The Next Generation Housing Committee will confirm project eligibility and provide advisory review of requested funding proposals with an advisory recommendation to the Washington County Executive Committee.
- The Washington County Executive Committee will review and consider all Next Generation Housing funding proposals. The Washington County Executive Committee has final authority to make all funding decisions on behalf of the program. All decisions are final.
- The County Executive Committee will review substantial changes to the Next Generation Housing Framework and Screening Checklist as needed.
- Due to the nature of housing development, there may be unusual circumstances where a funding request is required with a short turnaround time. In the event that the Washington County Community Development Department is not able to convene a quorum for a Next Generation Housing Committee meeting prior to a project deadline, the Community Development Department will notify the Next Generation Housing Committee that the Washington County Executive Committee will meet to review and consider the project proposal. Next Generation Housing Committee members will be invited to attend the Executive Committee meeting. The Community Development Department will provide an update to the Next Generation Housing Committee at their next meeting. The County Community Development Department will ensure that funds are available for the project requested and that the project is eligible for funding based on the Screening Checklist.
- The County will enter into a Memorandum of Agreement with local governments that act as developers for the Next Generation Housing development. The MOA will document roles and responsibilities for funded projects. The Memorandum of Agreement will be project specific and will require a formal approval by the local government board or council by motion or resolution.

- The County will enter into a Development Agreement with each developer and/or builder that will outline Next Generation Housing obligations.
- Development agreements may allow for homes in later phases of a development to align with adjusted NGH price points identified by the Washington County Executive Committee. The County Community Development Department will work directly with local governments, developers, or builders to complete the appropriate contractual amendments for future homes that utilize adjusted NGH price points.

Project Approval Process for Next Generation Housing Fund Proposals

Task	County Community Development Department	Next Gen. Housing Committee (NGHC)	Economic Develop. Washington County (EDWC)	Local Government/ Developer/ Builder	County Executive Committee
Submit Screening Checklist and Request Report				X	
Determine Initial Project Eligibility and Finalize Request to NGHC	X				
Development of NGHC Agenda	X				
Notification of NGHC Agenda		X	X	X	X
Confirm Project Eligibility and provide advisory recommendation to Co. Executive Committee		X			
Approval of Project Proposal					X
Development and Execution of Memorandum of Agreement (if Local Government is Developer)	X			X	
Execution of Development Agreement between County & Developer/Builder	X			X	

Home Price Point Parameters

Given the Next Generation Housing price point requirements, it is reasonable to require a minimum standard of quality that must be achieved within the price points. The following outlines price point parameters that home builders shall meet.

NGH Homes Not Utilizing TID Increment:

- Next Generation Housing requires 40% of homes selling for under \$340,000, 80% under \$360,000, and 100% under \$420,000. The sale price of the units shall include the \$20,000 Next Generation Housing Incentive. To accomplish this, home builders shall complete 40% of home/lot packages at a cost of under \$320,000, 80% of home/lot packages at a cost under \$340,000, and 100% under \$400,000. For example:
 - Home/Lot Package \$320,000 + Co. NGH Incentive: \$20,000 = \$340,000 Sale Price

- Home/Lot Package \$340,000 + Co. NGH Incentive: \$20,000 = \$360,000 Sale Price
- Home/Lot Package \$400,000 + Co. NGH Incentive: \$20,000 = \$420,000 Sale Price
- Multi-family only developments may opt to set 100% of owner-occupied housing unit sale prices at under \$350,000. The sale price of the units shall include the \$20,000 Next Generation Housing Incentive. To accomplish this, home builders shall complete home/lot packages at a cost of under \$330,000.

NGH Homes Utilizing TID Increment:

- Next Generation Housing developments utilizing TID Increment to reimburse the NGH Fund Incentive are able to create home/lot packages at the required price points without including the NGH \$20,000/ODU Incentive as the increment pays back the NGH Incentive.

Home Minimum Quality Standards

Given the Next Generation Housing price point requirements, it is reasonable to require a minimum standard of quality that must be achieved within the price points. The County’s objective is to reduce costs without sacrificing quality. The following provides minimum quality home standards for detached single family homes and twin home/duplex style homes participating in the Next Generation Housing initiative. Given that the home/lot packages must be under the Next Generation Housing price points there will be pressure on builders and developers to cut costs. The County seeks to prevent abuse of the system and ensure a baseline level of quality expectation for all Next Generation Housing homes.

Next Generation Housing homes should maintain or appreciate in value over time, and that appreciation should be comparable to that of existing homes in the community. These minimum standards are established by the County to ensure that the resulting homes meet the requirements for Next Generation Housing, particularly as related to quality materials, quality design, and long-term durability. Local governments may also choose to add additional quality standards to Next Generation Housing homes on a project-by-project basis.

The Next Generation Housing Minimum Quality Standards⁴ do not include all the requirements and necessary items for a “completed” home and are in addition to state building code requirements and other local building and zoning requirements:

1. Minimum two-bedroom home. If constructing a two-bedroom home, the basement shall include an egress window for potential addition of a bedroom in the basement.
2. Eight (8) foot basement foundation walls. Basement shall include rough-in drains for an additional full bathroom to be installed at a later date. Alternatives for split level homes

⁴ The following companies provided their expertise in determining Next Generation Housing Minimum Quality Standards: A&N Contracting, Harbor Homes, Hillcrest Builders, McHugh Construction, NuGen Homes, Stortz Construction, U Build It and Valido Homes.

and twin homes will be considered. Alternatives due to high water tables, high depth to bedrock, or other limiting factors will be considered.

3. Minimum 1 finished full bathroom and 1 finished half bathroom.
4. Minimum two car garage.
5. Contractor will provide at least a 1-year home warranty on all work.
6. Laminate, glue-down sheet vinyl flooring or luxury vinyl plank (LVP) for kitchen, dining, bath, and entry areas. LVP or carpet flooring for living room, hallway, bedrooms, and stairs with 8lb pad.
7. Washer and dryer location will be designed with proper drainage, hookup, and venting.
8. Passive sub-basement floor radon system.
9. 30-year or equivalent architectural asphalt shingle roof.
10. Aluminum Soffits, Facia, Gutters & Downspouts.
11. High duty/quality vinyl siding .042 inches.
12. Windows to have minimum energy star performance values for either vinyl or fiberglass high efficiency windows.
13. 2x6 exterior walls 16 inch on center with R19 and plywood/OSB sheathing.
14. R50 blown insulation in ceilings and attic.
15. Electrical panel with 200-amp capacity.
16. Ducted, gas, forced air central heating system with an energy efficiency rating of 92% or higher for heating.

Materials, quality or standards may be substituted with approval by the NGH Minimum Standards Review Team. Members of the Review Team will vary based on the development and request. A builder who makes the request to the Review Team shall provide adequate information for the variation and justification for an equivalent building standard. The Review Team's decision shall consider the opinion of a contracted Structural Engineer and other entities as needed. The Review Team will present the final decision on the standards variation by a majority vote.

- Voting members on the Review Team include:
 - NGH Committee Chairperson
 - Washington County Community Development Director or their designee
 - Local government Administrator or their designee
 - Local government Building Inspector or their designee
- Other supporting non-voting members:
 - Washington County Housing Specialist/Analyst
 - SEH Structural Engineer as needed
 - County Outside Counsel as needed
 - Other professionals or entities as needed

Home Builder Additional Requirements - Not Utilizing TID Increment

For Next Generation Housing developments not utilizing TID Increment to reimburse the NGH Fund Incentive, additional requirements include the following:

- Builders or developers participating in Next Generation Housing must be current on all obligations with all federal, state, and local governmental entities, including and utility and/or tax obligations of the county and local municipalities and be in good standing with the Wisconsin Department of Financial Institutions.
- All builders shall have a General Contractor's License.
- Builders shall provide County documentation confirming final sale price of home after close.
- Items that shall be included in the builder home/lot package not to exceed the \$320,000, \$340,000, and \$400,000 (or \$330,000 for multi-family) Next Generation Housing limits include:
 - These are not custom homes. Any requested home upgrades beyond these limits can be provided after final home closing.
 - Meet all Next Generation Housing Minimum Quality Standards
 - Fee of 2% for broker with procuring cause
 - Listing broker fee not to exceed 2%
 - Builder/developer profit
 - Permit and inspection fees
 - Impact fees and parkland dedication fees
 - Utility connection fees
 - Survey
 - Seller closing costs
 - Owner title policy
- Items that shall not be included in the builder home/lot package not to exceed the \$320,000, \$340,000, and \$400,000 (or \$330,000 for multi-family) Next Generation Housing limits include:
 - Lender Title
 - Appraisals attorney fees
 - Mortgage origination fees
 - Prepaid items & other lender fees
 - Escrow or settlement fees
 - Prorated property taxes
 - Recording fees
 - Appraisal
- Items local governments, developers or builders may consider adding to the not to exceed \$320,000, \$340,000, and \$400,000 (or \$330,000 for multi-family) Next Generation Housing limits include:
 - Landscaping
 - Driveway
 - Walkway

- Homeowners Association Costs and Dues
- Developers or builders participating in the NGH Initiative must substantiate costs and provide any information related to discounts on home construction, pricing, or work completed that they may request to be included in the deed restriction.
- Washington County Repayment Agreement with a Builder/Developer will include an appraisal of the property to determine the fair market value of the home prior to close. If the deed restriction is recorded with the Builder/Developer and Washington County, the County shall receive at least 10% of the deed restriction amount if the homeowner sells within five years.
- Multi-family home builders, if they opt into averaging the Next Generation Housing sale price, will construct complete home packages with 100% costs under \$330,000. The Next Generation Housing Fund Incentive of \$20,000 per owner-occupied dwelling unit will be an additional cost to the home buyer and the lien will be satisfied at time of close with a total sale price of under \$350,000.

Home Builder Additional Requirements - Utilizing TID Increment

For Next Generation Housing developments utilizing TID Increment, additional requirements include the following:

- Builders or developers participating in Next Generation Housing must be current on all obligations with all federal, state, and local governmental entities, including and utility and/or tax obligations of the county and local municipalities and be in good standing with the Wisconsin Department of Financial Institutions.
- All builders shall have a General Contractor's License.
- Builders shall provide County documentation confirming final sale price of home after close.
- Items that shall be included in the builder home/lot package sale price not to exceed the \$340,000, \$360,000, and \$420,000 (or \$350,000 for multi-family) Next Generation Housing limits include:
 - These are not custom homes. Any requested home upgrades beyond these limits can be provided after final home closing.
 - Meet all Next Generation Housing Minimum Quality Standards
 - Fee of 2% for broker with procuring cause
 - Listing broker fee not to exceed 2%
 - Builder/developer profit
 - Permit and inspection fees
 - Impact fees and parkland dedication fees
 - Utility connection fees
 - Survey
 - Seller closing costs
 - Owner title policy

- Items that shall not be included in the builder home/lot package sale price not to exceed the \$340,000, \$360,000, and \$420,000 (or \$350,000 for multi-family) Next Generation Housing limits include:
 - Lender Title
 - Appraisals attorney fees
 - Mortgage origination fees
 - Prepaid items & other lender fees
 - Escrow or settlement fees
 - Prorated property taxes
 - Recording fees
 - Appraisal
- Items local governments, developers or builders may consider adding to the not to exceed the \$340,000, \$360,000, and \$420,000 (or \$350,000 for multi-family) Next Generation Housing limits include:
 - Landscaping
 - Driveway
 - Walkway
 - Homeowners Association Costs and Dues

Marketing and Sales - Not Utilizing TID Increment

For Next Generation Housing developments not utilizing TID Increment to reimburse the NGH Fund Incentive, requirements in the marketing and sale of dwelling units include the following:

- For any one Next Generation Housing development, builders are restricted to 40% of dwelling units having a sale price under \$340,000, 80% under \$360,000, and 100% under \$420,000. These sale prices shall include the Next Generation Housing \$20,000 Incentive. If sale prices exceed these price points, the builder may be subject to penalties outlined in the development agreement, including forfeiting to the County any sale proceeds exceeding the price points and termination of agreement.
- For Next Generation Housing developments only comprised of all multi-family dwelling units, builders may opt to set 100% of owner-occupied unit sale price at under \$350,000. These sale prices shall include the Next Generation Housing \$20,000 Incentive. If sale prices exceed \$350,000, the builder may be subject to penalties outlined in the development agreement, including forfeiting to the County any sale proceeds exceeding the price points and termination of agreement.
- Builders shall agree to have a home listing agent to list home on Multiple Listing Service (MLS). MLS shall be the first and primary means of notifying the public of the availability of Next Generation Housing dwelling units for purchase.
- Offer Instructions will be prepared by the Community Development Department for builders to provide with the MLS listing when the home is for sale. These documents outline the various mechanisms in place that make Next Generation Housing successful. Key components of the Offer Instructions include the Next Generation Housing Occupancy

Agreement, the Deed Restriction Disclosure, the Mortgage and Declaration of Restrictions Disclosure, and the recorded Deed Restriction on the property. The home buyer will sign these documents when the builder accepts their offer and will be signed by the municipality or county and then provided back to the builder.

- The real estate brokerage fees shall be calculated based on the sale price less the NGH Incentive lien amount of \$20,000 (\$320,000, \$340,000, and \$400,000 or \$330,000 for multi-family home/lot package) and those fees shall be included within those amounts. The listing broker fee shall not exceed 2% and a fee of 2% shall also be paid to the broker with procuring cause; "procuring cause" meaning the uninterrupted series of causal events which results in the successful transaction. These fees shall not exceed 4% of the home sale price less the County Incentive and lien amount. Fees shall be listed on builder's or listing agents website. This section is subject to modification from time-to-time to comply with any change in applicable law or regulation and any provision that violates any law or regulation is not applicable.
- Builders shall receive and review all offers. As a participant in the NGH program, the Builder shall acknowledge and agree that the NGH program is intended to be accessible to any person with a desire to participate. As such, the Builder agrees to accept and review any and all offers that are presented by any potential buyer, provided the offers comply with NGH offer instructions. For any offer that the Builder rejects, the Builder agrees to deliver a rejection notice to the buyer or buyer's agent. Except if an offer fails to comply with the NGH offer instructions, the Builder will not refuse to accept, or review offers or place conditions in advance on what must be included in an offer. The Builder remains free to reject and negotiate offers in its discretion; provided it has allowed all interested persons an opportunity to submit an offer.
- Builders shall negotiate earnest money based on potential losses. Subject to the terms of the NGH Framework, the Builder is free to negotiate earnest money requirements in the offer to purchase. However, as a condition to participating in the NGH program, the Builder agrees that it will only retain earnest money related to a cancelled or terminated offer to the extent of the Builder's actual, documented out-of-pocket losses related to that offer. The Builder agrees to provide the County with an accounting of said losses if earnest money is retained by the Builder for a transaction that does not close. The Builder acknowledges and agrees that it would violate the intent of the NGH program if the Builder were allowed to keep earnest money, whether indicated as refundable or non-refundable in an offer, if the Builder did not have an actual loss resulting from that offer.
- Builders shall provide County documentation confirming final sale price of home after close.

Marketing and Sales - Utilizing TID Increment

For Next Generation Housing developments utilizing TID Increment to reimburse the NGH Fund Incentive, requirements in the marketing and sale of dwelling units include the following:

- For any one Next Generation Housing development, builders are restricted to 40% of dwelling units having a sale price under \$340,000, 80% under \$360,000, and 100% under \$420,000. If sale prices exceed these price points, the builder may be subject to penalties outlined in the development agreement, including forfeiting to the County any sale proceeds exceeding the price points and termination of agreement.
- For Next Generation Housing developments comprised of only multi-family dwelling units, builders may opt to set 100% of owner-occupied dwelling unit sale price at under \$350,000. If sale prices exceed \$350,000, the builder may be subject to penalties outlined in the development agreement, including forfeiting to the County any sale proceeds exceeding the price points and termination of agreement.
- Builders shall agree to have a home listing agent to list home on Multiple Listing Service (MLS). MLS shall be the first and primary means of notifying the public of the availability of Next Generation Housing dwelling units for purchase.
- Offer Instructions will be prepared by the Community Development Department for builders to provide with the MLS listing when the home is for sale. These documents outline the various mechanisms in place that make Next Generation Housing successful. Key components of the Offer Instructions include the Next Generation Housing Occupancy Agreement, the Deed Restriction Disclosure, the Mortgage and Declaration of Restrictions Disclosure, and the recorded Deed Restriction on the property. The home buyer will sign these documents when the builder accepts their offer and will be signed by the municipality or county and then provided back to the builder.
- The real estate brokerage fees shall be calculated based on the sale price and those fees shall be included within those amounts. The listing broker fee shall not exceed 2% and a fee of 2% shall also be paid to the broker with procuring cause; "procuring cause" meaning the uninterrupted series of causal events which results in the successful transaction. These fees shall not exceed 4% of the home sale price. Fees shall be listed on builder's or listing agents website. This section is subject to modification from time-to-time to comply with any change in applicable law or regulation and any provision that violates any law or regulation is not applicable.
- Builders shall receive and review all offers. As a participant in the NGH program, the Builder shall acknowledge and agree that the NGH program is intended to be accessible to any person with a desire to participate. As such, the Builder agrees to accept and review any and all offers that are presented by any potential buyer, provided the offers comply with NGH offer instructions. For any offer that the Builder rejects, the Builder agrees to deliver a rejection notice to the buyer or buyer's agent. Except if an offer fails to comply with the NGH offer instructions, the Builder will not refuse to accept, or review offers or place conditions in advance on what must be included in an offer. The Builder remains free to reject and negotiate offers in its discretion; provided it has allowed all interested persons an opportunity to submit an offer.

- Builders shall negotiate earnest money based on potential losses. Subject to the terms of the NGH Framework, the Builder is free to negotiate earnest money requirements in the offer to purchase. However, as a condition to participating in the NGH program, the Builder agrees that it will only retain earnest money related to a cancelled or terminated offer to the extent of the Builder's actual, documented out-of-pocket losses related to that offer. The Builder agrees to provide the County with an accounting of said losses if earnest money is retained by the Builder for a transaction that does not close. The Builder acknowledges and agrees that it would violate the intent of the NGH program if the Builder were allowed to keep earnest money, whether indicated as refundable or non-refundable in an offer, if the Builder did not have an actual loss resulting from that offer.
- Builders shall provide County documentation confirming final sale price of home after close.

Authority and Responsibility

As part of the Next Generation Housing program, the following outlines the authority and responsibilities of the main partnering entities:

- To ensure continuity and efficiency of the Next Generation Housing Program, the County will establish a Project Management Team for each Next Generation Housing development to move projects through the process. The Project Management Team will consist at a minimum of the Washington County Community Development Department and representatives from the development /builder team. The EDWC will serve on the Project Management Teams as needed based on project and financial structure complexity.
- For local governments acting as developers, guidelines for Next Generation Housing Procurement, Contracts and Reporting requirements apply in utilizing Next Generation Housing Funds (See Attachment E). County Procurement, Contracts and Reporting requirements may change over time and local governments should request any updates to Attachment E prior to initiating projects.
- Below outlines the general authority, roles and responsibilities for projects utilizing the Next Generation Housing Fund:
 - **County Community Development Department:**
 - Determine initial eligibility on requested projects based on the proposal documents and Screening Checklist.
 - Draft Memorandums of Agreement as needed and work with municipalities to execute Memorandum of Agreements.
 - Serve on the Project Management Team.
 - Pay professional services providers directly after invoice approval for all vendor contracts held by Washington County.
 - Track the Next Generation Housing projects and progress, including budget items and invoices.
 - Distribute Next Generation Housing Funds to local governments, developers and builders as outlined in development agreements and Memorandums of Agreement.
 - Create, negotiate, execute and record Development Agreements that outline Next Generation Housing obligations.

- Review development plans and home plans for compliance with the Next Generation Housing Framework.
- Draft Next Generation Housing Offer Instructions for builders to list on MLS.
- Organize and manage signed Offer Instructions.
- Work with outside council on development and recording of liens, subordinate mortgages, and deed restrictions as necessary for each Next Generation Housing development.
- Record NGH property lien and NGH Deed Restrictions or other documents as necessary.
- Complete the Payoff Letter for homes closing in NGH developments for the property lien mortgage satisfaction.
- Manage the property lien status and record mortgage satisfaction after home closing.
- Review declaration of covenants to ensure compliance with Next Generation Housing Framework owner- occupancy requirements.
- Work with local governments and Economic Development Washington County on creation of Tax Increment Financing Districts for Next Generation Housing developments as appropriate.
- Track homes sales and home closings.
- Update Next Generation Housing online dashboard.
- Provide necessary reporting to County Finance Department and County Executive Committee.
- Marketing Next Generation Housing Program as appropriate.
- For Infrastructure funding requests, request a Return-on-Investment Impact Analysis to be completed by Economic Development Washington County prior to requesting funding allocation.
- Establish public-private partnerships for the Next Generation Housing Initiative.
- Organize Next Generation Housing Committee meetings and prepare reports.
- Organize Wonderful Life Welcome Events for new homeowners in NGH developments.
- Review concept plans for homes in NGH developments to complete checklist for NGH Minimum Quality Standards.
- Organize Ad Hoc Workgroup meetings to discuss Next Generation Housing.
- Respond to public inquires related to Next Generation Housing.
- Work with municipalities to complete Request for Proposals or Request for Qualifications for projects.
- ***For Local Government Acting as Developer:***
 - Determine proposed use of funds.
 - Provide the Screening Checklist and related proposals to the Washington County Community Development Department to determine initial eligibility.
 - Enter into Memorandum of Agreement with Washington County with approval by board or council through motion or resolution.
 - Participate in the Project Management Team as needed to move projects through the process.

- Review, approve and pay professional service provider invoices for all vendor contracts held by local government.
- Return all unused Next Generation Housing Funds to Washington County within 90 days following project completion.
- Local government inspector confirms proposed homes meet minimum quality standards (Next Generation Housing min. and local government min.), confirm home/lot package price points are met and provides documentation to County. County can assist with this as requested by village/city.
- Consider waiving or reducing fees for Next Generation Housing developments.
- Consider streamlining ordinance and comprehensive plan amendments and processes.
- Comply with required Guidelines for Next Generation Housing Procurement, Contracts and Reporting (See Attachment E). County Procurement, Contracts and Reporting requirements may change over time and local governments should request any updates to Attachment E prior to initiating projects.
- ***For Developer / Builder Not Utilizing TID Increment***
 - Determine proposed use of funds.
 - Provide the Screening Checklist and related proposals to the Washington County Community Development Department to determine initial eligibility.
 - Work with County on creation of development agreement.
 - Comply with Development Agreement and all requirements of Next Generation Housing.
 - Provide a representative to attend Project Management Team Meetings through project implementation.
 - Return all unused Next Generation Housing Funds to Washington County within 90 days following project completion.
 - Substantiate costs and provide any information related to discounts on home construction, pricing, or work completed that will be part of a project.
- ***For Developer / Builder Utilizing TID Increment***
 - Determine proposed use of funds.
 - Provide the Screening Checklist and related proposals to the Washington County Community Development Department to determine initial eligibility.
 - Work with County on creation of development agreement.
 - Comply with Development Agreement and all requirements of Next Generation Housing.
 - Provide a representative to attend Project Management Team Meetings through project implementation.
- ***Economic Development Washington County (EDWC)***
 - Participate in Project Management Team as needed based on project and financial structure complexity.
 - Complete Return on Investment Impact Analysis for all Next Generation Housing development projects initiating infrastructure development at a specified cost per Impact Analysis.
 - If requested, EDWC will provide input on Next Generation Housing meeting agendas and public engagement events, as necessary.

Next Generation Housing Committee

The Next Generation Housing Committee (NGHC) was formed in November of 2021 with the first meeting in December 2021. The following provides an overview of the organization and authority of the Committee.

- The Next Generation Housing Committee acts in an advisory manner to the Washington County Executive Committee to advance Next Generation Housing developments, community outreach and involvement through the Next Generation Housing Fund and Program.
- The NGHC provides advisory review and recommendations related to funding proposals, budget, inventory and public engagement of the Next Generation Housing Program.
- The NGHC includes representatives from the City of West Bend, villages of Slinger, Richfield, Jackson, Germantown, Kewaskum, and Newburg, a town representative, Washington County Board of Supervisors, Economic Development Washington County, Hartford Area Development Corporation, West Bend Chamber of Commerce, Hartford Area chamber of Commerce, Germantown Area Chamber of Commerce, and the Wisconsin Department of Workforce Development.
- The NGHC will convene as needed, with the public meetings widely promoted encouraging participation by our partnering organizations and public.
- At the March 14, 2022, NGHC meeting, the Committee approved the creation of a temporary Inventory Workgroup for the prioritization of the Next Generation Housing developments. The County Community Development Department met individually with each municipality to select their inventory sites for potential development. The Inventory Workgroup convened to establish the ranking criteria and review the analysis. The inventory ranking process can be reviewed as requested by the Next Generation Housing Committee. A full description of the analysis process can be found in Attachment F.

Next Generation Housing Ad Hoc Workgroup

The Next Generation Housing Ad Hoc Workgroup was established in December 2021. The following provides an overview of the Ad Hoc Workgroup.

- The Next Generation Housing Ad Hoc Workgroup gathers a select group of professionals who are directly involved in the housing market and the development process. These individuals, with their expertise on housing, bring a unique background to help brainstorm solutions to housing barriers and develop tools and strategies for implementation.
- Membership of the Ad Hoc Workgroup is comprised of a variety of stakeholders (lenders, educators, builders, developers, planners, businesses, civic organizations, non-profit organizations, and realtors).
- The first meeting of the Ad Hoc Workgroup was on December 16, 2021. This two-hour workshop was not only an introduction to the Next Generation Housing Initiative, but also a breakout group brainstorming session on the potential barriers to housing and potential solutions to those barriers. The breakout facilitation groups focused on:

- High Development Costs and Zoning & Land Division Regulations
- Housing Down Payments and Workforce Education & Connection
- Public Outreach
- The goal of this workgroup is to be a resource for determining real solutions to barriers and for implementing solutions.
- A second Ad Hoc Workgroup meeting was hosted in August 2022 specifically engaging builders at the Builders Forum. The goal of the forum was to understand builders' processes and timelines for construction and discuss ways to reduce costs.
- A third Ad Hoc Workgroup meeting in October 2022 also focused on engaging builders, real estate agents, banking and financing professionals, engineering firms, and municipal representatives. The builders that are interested in the program met individually with the County and municipalities to further discuss the Next Generation Housing Initiative.
- The Community Development Department also hosted a Real Estate Forum in September 2023. This event brought together lenders, real estate agents, and other stakeholders to discuss the mechanisms utilized in Next Generation Housing developments including the property lien, deed restriction, and the status of the Oaks of Jackson.

Public Engagement

The Next Generation Housing Program is focused on providing ample public engagement opportunities. The following provides an overview of planned and completed public engagement.

- To maximize the extent to which community residents and other stakeholders can provide meaningful input into the Next Generation Housing Program, the County will develop a community education and outreach program with elements that include Next Generation Housing Committee public meetings, County-wide and community specific public meetings and forums, print and web-based communication tools including the development and distribution of marketing and informational materials.
- Joint outreach and education efforts with local governments may be completed as part of Next Generation Housing Pilot development implementation strategies.
- Develop a marketing plan for the Next Generation Housing Initiative to connect, educate, and engage businesses & residents on Next Generation Housing opportunities and the positive impact these developments will have on the future success of their community.
- The Community Development Department will provide periodic updates to the Next Generation Housing Ad Hoc Workgroup and other interested parties.
- The Community Development Department will develop a Success Stories ArcGIS StoryMap detailing successful Next Generation Housing developments.
- The Community Development Department will update our Next Generation Housing webpage on the Washington County website periodically to ensure all information is up to date on the latest projects. Videos explaining the mechanisms for Next Generation Housing and success stories will be posted on the Washington County website.
- The Oaks of Jackson project has led to multiple public meetings discussing Next Generation Housing and the development as a whole. After the Builder Announcement event in October

2023, the Village of Jackson and County hosted a public open house to allow residents and interested buyers speak to Hillcrest Builders and Harbor Homes about what would become available on MLS and what their products look like.

Measures of Success

The Next Generation Housing Initiative has identified the following measures of success that will be tracked and documented to be provided to the Next Generation Housing Committee, County Executive Committee, and other stakeholders.

- Number of total value of Next Generation Housing owner-occupied units constructed and sold based on established priced points.
- Number of acres of Next Generation Housing developments throughout Washington County.
- Amount of new property tax revenue realized by Next Generation Housing developments.
- Creation of a Model Zoning Guidelines document for Next Generation Housing developments.
- Creation of a Model Declaration of Covenants document for Next Generation Housing developments.
- Number of Comprehensive Plans updated by cities and villages integrating Next Generation Housing language.

Attachments

Attachment A – Washington County Board of Supervisors 2022 Resolution 22

Attachment B – Washington County Board of Supervisors 2021 Resolution 43

Attachment C – Flowchart for Next Generation Housing Fund Process

Attachment D – Screening Checklist

Attachment E – Guidelines for Washington County Procurement and Reporting

Attachment F – Next Generation Housing Inventory Ranking Analysis

Attachment A – Washington County Board of Supervisors 2022 Resolution 22

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WASHINGTON COUNTY, WISCONSIN

Date of enactment: 7-13-2022
Date of publication: 7-19-2022

2022 RESOLUTION 22

Transfer from the General Fund for Next Generation Housing Development

WHEREAS, Section 15-6I of the Washington County Code states that Transfers and appropriations authorized under § 65.90(5)(a), Wis. Stats., requiring County Board approval shall be made upon the recommendation of the appropriate standing committee and by resolution adopted by a vote of 2/3 of the members-elect; and

WHEREAS, the United States Government passed the American Rescue Plan Act (ARPA) on March 11, 2021, which established a Coronavirus Local Fiscal Recovery Plan which is intended to assist local governments, including Washington County, in responding to the impact COVID-19 has had on the local community; and

WHEREAS, on September 8, 2021 the Washington County Board of Supervisors adopted 2021 Resolution 43 accepting more than \$26 million dollars in ARPA Funds to assist in relief efforts; and

WHEREAS, on October 7, 2021 Washington County announced a \$10 million Next Generation Housing (NGH) Fund, utilizing ARPA Funds, to provide obtainable quality housing opportunities throughout the County for our next generation; and

WHEREAS, on May 18, 2022, the Washington County Executive Committee approved by consensus, the Next Generation Housing Fund Framework and Budget identifying \$7,500,000 for NGH Pilot Developments and start up tasks for future NGH developments; and

WHEREAS, in an effort to streamline mandatory ARPA reporting, the \$7.5 million identified for NGH Developments has been allocated to another project and is no longer available for the NGH project;

NOW, THEREFORE, BE IT RESOLVED by the Washington County Board of Supervisors that an amount of \$7,500,000 is hereby transferred from the General Fund to the Next Generation Fund for Next Generation Housing Pilot Developments and start up tasks for future NGH developments.

VOTE REQUIREMENT FOR PASSAGE: 2/3 of the members elect

RESOLUTION SUMMARY: Authorization to transfer \$7,500,000 from the General Fund to the Next Generation Fund for Next Generation Housing Pilot Developments and start up tasks for future NGH developments.

1 Approved as to form: _____ Introduced by members of the EXECUTIVE
2 Eileen T. Evans COMMITTEE as filed with the County Clerk.

3 Eileen T. Evans, Deputy County Attorney

4 Dated 7-14-22

J. D. Schleif
Jeffrey D. Schleif, Chairperson

6 Approved:

7 Josh Schoemann

Considered 7-13-2022

8 Josh Schoemann, County Executive

Adopted 7-13-2022

9 Dated 19 July 22

Ayes 17 Noes 3 Absent 1

10 Veto

Voice Vote _____

11 Partial Veto

12

13 (The initial General Fund transfer will be recouped during the 2022 year-end close and will not
14 impact the County's current financial standing. It will temporarily impact our compliance with
15 the fund balance policies. This resolution also approves budget adjustments for use of the ARPA
16 funds and the General Fund Transfer.)

Attachment B – Washington County Board of Supervisors 2021 Resolution 43

1 *WASHINGTON COUNTY, WISCONSIN*

2
3 Date of enactment: 9-8-2021
4 Date of publication: 9-16-2021
5

6 **2021 RESOLUTION 43**

7
8 **Resolution Accepting American Rescue Plan Act (ARPA) Funding**
9

10 **WHEREAS**, since the first case of Coronavirus (COVID-19) was discovered in the United
11 States in January 2020, the disease has infected over 32 million Americans including over 16,000
12 Washington County residents; and
13

14 **WHEREAS**, in addition to adversely affecting the health of millions of people, the
15 worldwide response to the pandemic has had a devastating impact on the economy resulting in
16 high rates of unemployment and business closings, and has impacted nearly every other aspect of
17 daily life; and
18

19 **WHEREAS**, the United States Government passed the American Rescue Plan Act
20 (ARPA) on March 11, 2021, which established a Coronavirus Local Fiscal Recovery Plan which
21 is intended to assist local governments, including Washington County, in responding to the impact
22 COVID-19 has had on the local community; and
23

24 **WHEREAS**, under the provisions of ARPA, Washington County is to receive more than
25 \$26 million dollars to assist in relief efforts; and
26

27 **WHEREAS**, ARPA dollars are essentially a grant from the Federal Government and
28 Washington County is able to accept grant funding pursuant to s. 59.52(19) of the Wisconsin
29 Statutes; and
30

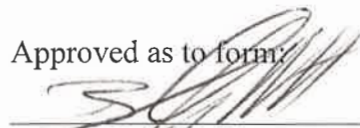
31 **WHEREAS**, pursuant to Washington County Policy FINP-11-Grant Policy, the County
32 has delegated administration of grant dollars and programs to the departments, offices, and
33 agencies that have direct oversight or responsibility for the programs that the grant dollars will
34 support;
35


36 **NOW, THEREFORE, BE IT RESOLVED** by the Washington County Board of
37 Supervisors that this Board accepts ARPA funding.
38

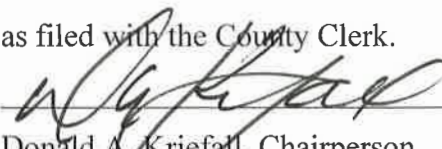
39 **BE IT FURTHER RESOLVED** that ARPA funds shall be administered consistent with
40 the County’s Grant Policy.
41

42 VOTE REQUIREMENT FOR PASSAGE: Majority
43

44 RESOLUTION SUMMARY: Resolution accepting ARPA funding.
45

1 Approved as to form:
2 
3 _____
4 Bradley S. Stern, County Attorney
5 Dated 9/10/2021

6 Approved:
7 
8 Josh Schoemann, County Executive
9 Dated 13 Sept 21

Introduced by DONALD A. KRIEFALL
COUNTY BOARD CHAIR
as filed with the County Clerk.

_____ Donald A. Kriefall, Chairperson
Considered 9-8-2021
Adopted 9-8-2021
Ayes 22 Noes 0 Absent 4
Voice Vote X

- 10 Veto
- 11 Partial Veto

12
13 (Acceptance of the ARPA funds would result in increased revenues and expenditures of
14 approximately \$26.4 million. Receipt and expenditure of the ARPA funds will be managed and
15 reported through the County's financial system.)

Attachment C – Flowchart for Next Generation Housing Fund Process

Washington County Next Generation Housing Fund Pilot Flowchart - NGH Property Lien

7/17/2024



The Next Generation Housing (NGH) Fund Investment acts as a 0% loan to assist with cash flow and financing for new owner-occupied dwelling units in Washington County that is paid back at the time of close and is included within the total sale price of each NGH home. This applies to NGH developments not utilizing TID Increment to reimburse the NGH Fund Incentive.



Washington County provides municipality, builder, or developer up to \$20,000 per owner-occupied dwelling unit from the NGH Fund as an investment into new owner-occupied housing.



A property lien is placed on each lot/unit utilizing the NGH Fund. The municipality, builder, or developer uses the \$20,000 per owner-occupied dwelling unit to cover eligible expenses of funds outlined in the Next Generation Housing Framework.



The municipality, builder, or developer will either contract out for the work or complete the home construction. The builder enters into a Development Agreement with Washington County outlining (1) Washington County will receive \$20,000 NGH Investment at time of home closing to satisfy the property lien, (2) the builder sells lot for the same purchase price to home buyer, agrees to meet NGH price points, and agrees to meet the NGH Minimum Home Standards.



The builder constructs the homes with 40% under \$320,000, 80% under \$340,000 and 100% under \$400,000 (or 100% under \$330,000 for all multi-family), creating a home and lot package sold under \$340,000, \$360,000, or \$420,000 (or under \$350,000 for all multi-family).

\$20,000 NGH Investment
+
land/infrastructure and home cost
=
max limit of \$340,000, \$360,000, or \$420,000 home/lot package (or \$350,000 for all multi-family)



The builder sells the home to the buyer for under \$340,000, \$360,000, or \$420,000 (or \$350,000 for all multi-family) at the full cost of home/lot package.



After closing, the title company pays Washington County \$20,000 per owner-occupied dwelling unit and the property lien is satisfied.

Attachment D – Screening Checklist



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Next Generation Housing Development Screening Checklist

Revised 7/22/2024

Washington County Next Generation Housing Initiative

The Next Generation Housing (NGH) Initiative is a coalition of Washington County communities that coordinate efforts and resources to provide obtainable quality housing options with a goal of providing 1,000 new owner-occupied housing units in NGH Developments with 40% under \$340,000, 80% under \$360,000, and 100% under 420,000, including home and lot/site, by 2032 (or 100% under \$350,000 for multi-family only developments). Builders constructing multi-family only developments have the option to utilize the original tiered Next Generation Housing price points. This provides two pricing strategies for multi-family only developments.

The NGH Initiative is able to provide funding to assist with certain activities related to the research, design, engineering, surveying, environmental due diligence, land acquisition, infrastructure development, and direct developer incentives of NGH housing developments throughout Washington County. This checklist should be used to determine if a proposed NGH housing development project aligns with the vision/goals of the NGH Initiative and therefore appropriate for investment by the NGH Committee and Washington County.

Owner/Representative Name & Title: _____

Owner/Representative Phone Number: _____

Address/Location of NGH Development: _____

Brief Description of Funding Request: _____

Please Identify the Type of Funding Request:

- Municipal-County Partnership Outside of a TID or within a TID but not utilizing TID increment
- Private Developer/Builder-County Partnership Outside of a TID
- Municipal-County Partnership within a TID – Utilizing Increment to Reimburse \$20,000 NGH Fund Investment
- County-owned Site in Partnership with Private Developer/Builder
- 100% Core Construction Permit Fee Incentive

Screening for all funding proposals:

1. Does the proposal move a NGH Development forward in fulfilling the goal of 1,000 NGH owner-occupied housing?
 - Yes – Forwarding the goal of 1,000 NGH owner-occupied homes is essential for the success of the NGH Initiative.
 - No – Review project further to align with Next Generation Housing and project goals.

DISCOVER. CONNECT. PROSPER.



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2. Does the proposal align with the definition of Next Generation Housing? (New owner-occupied housing units in NGH Developments with 40% under \$340,000, 80% under \$360,000, and 100% under \$420,000, including home and lot/site, or 100% under \$350,000 for multi-family only developments.)
 - Yes – The proposal consists of new owner-occupied housing units in Washington County per definition.
 - No – Review project further to align with Next Generation Housing and project goals.
3. Was any portion of the site obtained through eminent domain by a local government, Washington County, or the State of Wisconsin?
 - Yes – The site is not eligible for Next Generation Housing.
 - No – The site was not obtained utilizing eminent domain.
4. Does the Coalition Partner, developer or builder have the tools, time, and resources in place to make the proposal a priority? Implementing this initiative will require intergovernmental cooperation.
 - Yes – Resources are in place to make the proposal a priority.
 - No – Review project further to align with Next Generation Housing and project goals.
5. For builder funding requests, does the site have existing infrastructure and is shovel ready for home building?
 - Yes – Site has existing infrastructure.
 - No – Builder needs to engage developer prior to requesting funds.
 - Other – please explain.
6. Is the site owner ready/agreeable to housing development?
 - Yes – The property owner is interested and ready for development.
 - No – Review project further to align with Next Generation Housing and project goals.
7. For infrastructure development funding requests, have all applicable preliminary plat and zoning approvals (local, county, state) and a development agreement in principle been established?
 - Yes – The funding request can move forward.
 - No – Review project further to align with Next Generation Housing and project goals.
 - In Progress
8. Does the proposed development site substantially comply with the goals and Framework for Next Generation Housing? Is the site consistent with the development type?
 - Yes – The site is consistent with the goals and Framework for Next Generation Housing.
 - No – Review project further to align with Next Generation Housing and project goals.
9. Is this project within a TID and is the TID funding reimbursing the NGH Fund Incentive?
 - Yes – Please provide the TID plan or structure showing increment reimbursement of NGH Incentive.
 - No – TID plan not required.



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10. For private developers and builders, are you current on all obligations with all federal, state, and local governmental entities, including any utility and/or tax obligations of the county and local municipalities?
- Yes – We are current on all obligations.
 - No – Review project further to align with Next Generation Housing and project goals.
11. Is the site proposal consistent with the local government’s future land use of that site?
- Yes – The site is consistent with the local government’s future land use of that site.
 - No – The site is not consistent and may require a Comprehensive Plan Amendment.

Please describe:

12. Is this site within the Sewer Service Area?
- Yes – The site is within the Sewer Service Area.
 - No – Please describe if planning a shared septic or other mechanism.

13. Are sewer and water utilities located to the site?
- Yes – Sewer and water utilities are located to the site and will help keep costs down.
 - No – Sewer and water utilities are not located to the site. Please describe below how close the utilities are to the site.

14. Is gravity sewer available to the frontage?
- Yes – Gravity sewer is available to the frontage.
 - No – Gravity sewer is not available to the frontage.

15. Is there a developer/engineer at the table? Please describe their involvement:

16. Is there community/government support for the proposal? Please describe:



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17. Are there incentives (such as TIF districts) already in place or proposed for the site? Please describe:

18. For developer or builder funding requests, please describe in detail the need for NGH funds for the success of this project. How will the NGH Funds affect the projected profits for the builder or developer?

19. For developer or builder funding requests, is the financing in place for this project? Please describe.

20. The developer/builder has been in contact with the local government regarding the NGH development to discuss all local regulations and requirements.

21. Is the site relatively simple and free of costly complications? Please identify any hurdles or obstacles for developing the potential site.



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22. Are there environmental concerns with the site? If there are significant environmentally sensitive areas on the site, it may not be a good candidate for NGH funding. If the site is on the Brownfields Inventory, additional funding may be available through the County Brownfields Redevelopment Program. Sites with more environmental concerns may extend the project completion date and add complexity to the project. Please describe:

23. Is there intention for the site to be within a high-density zoning district? This could include small lot size or high density per acre. Please describe.

24. If there are rentals proposed on a portion of the site, please describe when the rental lot is anticipated to be subdivided from the site.

25. Please describe what type of contributions or support the local government is providing for this project. This may include but is not limited to: financial, internal work, reduction or waiving of fees, amendments to zoning and/or local comprehensive plan or engagement from the Board/Council.

26. For infrastructure construction requests, has an EDWC ROI Impact Analysis been completed for the proposal? Please attach the summary report to this checklist for review by the Next Generation Housing Committee.



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27. For projects requesting the 100% Core Construction Permit Fees Incentive paid by the County, please provide all permit types, permit amount, and other essential information for each lot/development. Please see the list of eligible permits in the NGH Framework for eligibility requirements. Permitting documentation will be required prior to approval and disbursement of funds.

28. If there is a portion of the site that is non-owner occupied, the municipality will complete the following analysis to determine what percentage of the total cost of the project will be removed from the Next Generation Housing Fund request.

Category	Total Acreage	Percentage of Total Site
Total acreage of development site		
Total acreage of owner-occupied housing		
Total acreage of rental housing		
Total acreage of open space		
Total acreage of stormwater management		
Total acreage of roadways on the site		
Category	Number of Owner-Occupied Units	Number of Rental Units
Breakdown of owner-occupied units and rental units		

Submit this checklist along with any proposal attachments to the Community Development Department at cddinfo@washcowisco.gov. This checklist, along with all project proposal materials will be provided to the Next Generation Housing Committee and County Executive Committee as part of their review and consideration of the funding request.

Attachment E – Guidelines for Washington County Procurement and Reporting



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Attachment F

Guidelines for Next Generation Housing Procurement, Contracts and Reporting

The Washington County Next Generation Housing (NGH) Fund consists of \$10,000,000 allocated to address the ongoing workforce housing issues in the County. Of the \$10 million, \$7.5 million is dedicated to pilot developments and start-up funds for municipalities. On July 13, 2022 the Washington County Board of Supervisors adopted 2022 Resolution 22, which approved \$7.5 million transfer from the General Fund for the Next Generation Housing (NGH) Initiative.

Procurement

Procurement and Reporting requirements apply in utilizing Next Generation Housing funds. Local governments entering into a Memorandum of Agreement with Washington County are required to follow all applicable *Wisconsin Statutes* for procurement of services including, but not limited to, Section 59.52(29) Wis.Stats. If local governments request assistance from the Washington County Purchasing Office for procurement of services, the County will follow the most restrictive statutory requirements. Local governments that do not have a written procurement policy are encouraged to develop procedures based on applicable *Wisconsin Statutes*. It is recommended local governments report to the Community Development Department on all procurement and progress of projects.

When utilizing County Purchasing Office for Requests for Proposals (RFPs), Requests for Qualifications (RFQs), or Requests for Bids (RFBs), the review team shall include representatives from local governments and County Community Development Department to review proposals. If local governments send RFPs, RFQs, RFBs out for Next Generation Housing related procurement but do not utilize the County Purchasing Office, the requests shall be reviewed by County prior to advertising and the review team shall include representative(s) from the County to review proposals.

Contracts

Local governments utilizing Next Generation Housing Funds shall enter into a contract with each vendor. Local governments will provide the NGH Project Manager with a copy of the signed contract. Once the signed contract is received, Washington County will grant funds to the local government for the full contracted amount. Local governments are responsible for reviewing invoices and paying vendors.

For local governments utilizing the Next Generation Housing Fund for pilot developments or additional start-up projects:

- If additional funds are required above the contracted amount but within the approved amount by the Next Generation Housing Committee, the local government will request those funds through the NGH Project Manager.
- If additional funds are needed above the Next Generation Housing Committee approved funding amount, a separate funding request will need to be submitted for consideration by the Next Generation Housing Committee.

For local governments utilizing the Next Generation Housing Fund for initial start-up projects, additional funding for the projects shall be requested through the Next Generation Housing



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Project Manager as outlined in the Project Eligibility and Approval Process Section of the Framework for the Washington County Next Generation Housing Fund.

Reporting

Local governments utilizing Next Generation Housing Funds shall provide the following reporting:

- Once a project is completed and all invoices have been paid, local governments shall provide copies of all paid invoices and proof of payment to the vendors to the County NGH Project Manager.
- Local governments are responsible for all required tax reporting for vendors including Form 1099.

Unused Funds

Following completion of each approved project where a local government was granted Next Generation Housing Funds, the local government shall return all unused funds within 90 days after project completion to Washington County.



FINANCE DEPARTMENT
Margaret M. Hamers, Finance Director

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FINP-10-PROCUREMENT POLICY			
EFFECTIVE	08/15/19	REVISED	

1. Purpose

This policy is intended to provide a set of guiding values and principles for public procurement practices in Washington County. Our goal is a fair and impartial, accountable, and transparent public procurement system in compliance with federal and state laws and other County policies while maximizing purchasing efficiency and the use of public funds.

2. Scope

This policy applies to all County departments for the purchase (including leasing or renting) of public work, materials, supplies, equipment, goods, and services.

3. Definitions

- **Cooperative Purchasing** is a purchase conducted on behalf of two or more public agencies for the common purchase of goods or services. This method is used to maximize the volume of common goods or services being purchased in order to obtain the best pricing for the agencies.
- **Direct Purchases** are procurements of goods or services that do not require a competitive solicitation process. Direct purchasing includes professional services, sole source and other exempt purchases as described in Section 8 of this policy. Previous direct purchases do not guarantee future direct purchases as circumstances may change.
- **Piggyback Purchasing** allows for purchases from another public entity's bid or contract at the established pricing as allowed by state statute. Contracts include those bid or negotiated by the state and local or national purchasing cooperatives (including, but not limited to the VALUE group or US Communities).
- **Professional Services** are any services requiring certain specialized education, technical ability and/or experience (including, but not limited to: nursing and other health services provided for the benefit and welfare of County residents, architectural and engineering services, auditing services).
- **Public Work** includes any contract for the construction, repair, remodeling or improvement of any public work or building as referred to in Section 59.52(29), Wis.

Stats. Public work does not include purchases of machinery or equipment, such as an automobile.

- **Responsible, Responsive Bidder** is a bidder who has the capability and/or qualifications to perform all aspects of the project requirements and who submits a complete bid per all the requirements of the bid documents.
- **Sole Source** includes purchases of any value that are available from only one responsible source. These purchases require documentation of specific reasons for sole source (e.g. compatibility with existing equipment) and a determination review by Purchasing. Utility purchases are considered a sole source but do not require a determination review by Purchasing.

4. Procurement Objectives

Cost: The County shall consider the long-term value of a purchase and consider ongoing maintenance, operating costs, and other indirect costs in purchasing decisions. The full lifecycle costs of a good or service may be considered when developing bid specifications and when evaluating vendor price proposals.

Quality: County purchase decisions should be based on best value, not lowest cost when possible. The goal is to secure goods and services at the lowest cost possible that is commensurate with quality requirements.

Timeliness: The County recognizes the importance of flexibility to use procurement strategies that best suit the situation in order to achieve timely delivery of goods and services for user departments.

Risk Management: While little to no risk exposure is ideal, excessive risk aversion can prevent the County from realizing the best value in purchases. Purchasing decisions will be evaluated to reduce risk to the lowest possible levels while maximizing value.

Maximizing Competition: Competition is essential to getting the best value. The County will strive for full and open competition in procurements.

Maintaining Integrity and Transparency. Recognizing that taxpayer dollars are being spent, it is essential that procurements are conducted fairly and processes and results are open to the public.

5. Purchasing Authority

Departments have the authority to make direct purchases of any budgeted item with an estimated value of less than \$10,000. Departments are encouraged to use a competitive solicitation process when feasible and advantageous to the County. Additionally, the use of purchase orders for purchases in excess of \$1,000 is also encouraged as a budget management mechanism.

When estimated costs exceed \$10,000, departments shall work with Purchasing staff to select a sensible method of purchase that promotes fair and open competition and to obtain the lowest practicable price. Such methods include, but are not limited to, Request for Quotes (RFQ), Request for Bids (RFB), Request for Proposals (RFP), and cooperative purchases.

When estimated costs exceed \$25,000, a competitive solicitation process shall be used. Purchases shall not be split in to multiple smaller purchases to avoid using a competitive solicitation process. In the absence of an adequate bid list, the County may publish a public notice in the County’s official newspaper.

When developing bid specifications, quality requirements should be considered and specifications written to obtain the best value for the procurement. Award will generally be made to the lowest responsible, responsive bidder who complies with the bid specifications and can meet the requirements of the solicitation.

Although not required, it is strongly recommended that professional services be bid through an RFP process where possible. The RFP process shall include separately sealed pricing proposals.

Departments are responsible for ensuring that adequate budget funds are available for all purchases. Documentation of available budget funds shall be provided to purchasing staff upon request.

6. Special Purchasing Authority

The following are exceptions to the procurement thresholds noted in section 5 of this policy:

- The Circuit Judges may authorize the fees of court appointed attorneys and guardians ad litem.
- The Clerk of Courts may authorize the fees of interpreters, expert witnesses, witnesses, court reporters and such other services directly required by the court.
- The Sheriff may authorize covert operations purchases to the extent budgeted funds are available. Such covert expenditures shall be reported to the County Administrator when requested; however, records of covert expenditures shall remain confidential.

7. Public Work Purchases

The County must follow Wis. Stat. 59.52(29) and Chapter 66 of the Wisconsin Statutes relating to Public Works and Projects for procurement of public works. When the estimated cost exceeds \$25,000 competitive bidding applies except when the board, by resolution, has determined there is an emergency and waives bidding requirements. Purchasing staff will ensure the County is meeting these requirements for all applicable public work procurements including those within the Capital Improvement Plan (CIP).

Any public work with an estimated cost below \$25,000 shall follow the methods of purchase noted section 5 of this policy. Additionally, if the estimated cost is between \$5,000 and \$25,000, a class 1 notice shall be given before contracting for work.

8. Exemptions to Competitive Bidding

The competitive process may be waived in the following circumstances. Departments must provide written request to Purchasing staff for an exemption.

- a. emergency purchases
- b. sole source purchases
- c. purchase of professional services
- d. to provide for uniformity or to maintain conformance with organization standards
- e. when unique or opportune market conditions are present
- f. when competitive bidding would be impractical or cost prohibitive (including rebidding after an unsuccessful competitive bid process)
- g. where the purchase is of a technical or experimental nature, or where creative talent, scientific knowledge or special skills or training are required.
- h. purchases made through an existing cooperative or piggyback contract

9. Emergency Purchases

Emergency purchases are those made when a circumstance, physical condition or one or more practices, methods or operations which would, unless immediate action is taken, present an imminent risk of death or great bodily harm, loss of property, environmental harm, or which would interrupt or create a substantial risk of interruption of essential government services. All emergency purchases shall be reported to the department's standing committee as soon as reasonably possible.

If such a purchase exceeds \$5,000 or where sufficient budget funds are not available, the requesting department head shall consult the County Administrator prior to making the purchase. If sufficient funds are not available within the department budget, the department head shall follow the Administrative Policy for budget transfers.

10. Grant Funded Purchases

All purchases made with grant funds, in whole or part, shall comply with the terms and conditions of the grant agreement and with this policy. If grant requirements conflict with this policy, the County Administrator may suspend the conflicting provisions of this policy provided that such suspension is not a legal mandate and only for the specific grant and for the duration of that grant. The department head is responsible for complying with the terms of the grant and for the management of items purchased with grant funds.

11. Monitoring and Annual Review of Policy

This policy will be updated as circumstances change and changes reported to the appropriate standing committee.

Attachment F – Next Generation Housing Inventory Ranking Analysis



Community Development Department

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Next Generation Housing Inventory Ranking Analysis

Gathering Inventory Sites

The Community Development Department met individually with each municipality to select their inventory sites. Sites were selected based on the representative’s knowledge of available potential development sites. After these meetings, the sites were integrated into a Geographic Information Systems (GIS) layer that outlined:

- The number of parcels within the site
- The Tax IDs
- Ownership type (Public or Private)
- Municipal Priority
- Development Type
- Acres
- Brownfield Inventory Site

Establishing the Inventory Workgroup

At the March 14, 2022 Next Generation Housing Committee (NGHC) meeting, the Committee approved the creation of the temporary workgroup for the prioritization of the Next Generation Housing Developments. This Workgroup was comprised of the local government representatives on the Committee. After the sites were established, the Workgroup worked to finalize the criteria used to rank and analyze the inventory sites. The representatives of the Inventory Workgroup are listed below.

City of Hartford	Justin Drew
City of West Bend	Mark Piotrowicz
Village of Richfield	Katherine Gehl
Village of Germantown	Steve Kreklow (Jeff Retzlaff - alternate)
Village of Jackson	Jen Keller
Village of Kewaskum	Adam Gitter
Village of Newburg	Dave DeLuka (Deanna Alexander – alternate)
Village of Slinger	Margaret Wilber (Jim Haggerty – alternate)
Hartford Area Development Corporation	Tom Hostad

The Next Generation Housing Inventory Workgroup convened three times to confirm and analyze the ranking process. Brief descriptions of the meetings and the general timeline of finalizing the ranking analysis are listed.

NGHC March 14, 2022: The Next Generation Housing Committee had an opportunity to provide initial thoughts and ideas of criteria that should be included in the prioritization of the site inventory.

Workgroup May 19, 2022: The Inventory Workgroup reviewed the initial ranking criteria that was created by County staff based on the brainstorming session at the Next Generation Housing Committee meeting. The municipal representatives had the opportunity to provide feedback for revision and gave suggestions to improve the analysis process. Based on discussions, the Workgroup recommended two ranking structures – the initial ranking criteria and secondary sub-ranking criteria for the top 20 sites to simplify the process.

Workgroup June 6, 2022: The Workgroup reviewed the revised initial and sub-ranking criteria. The Workgroup assigned the specific weight of each criterion for the ranking process, specifying what questions should be scored higher than others. The revisions were approved by the Workgroup and the ranking criteria was finalized for the Next Generation Housing Inventory sites.

June 6, 2022: Staff sent out the final ranking criteria to the local government representatives to complete their sections.

June 17, 2022: Staff received analysis back from the local government representative and collected the responses.

June 18, 2022: Staff completed the developable area analysis for the inventory sites using ArcGIS Pro.

Workgroup June 22, 2022: Staff presented the preliminary ranking results of the inventory ranking analysis. After brief discussions and minor revisions from the Workgroup, consideration was given, and the inventory ranking was approved by the Workgroup. The top inventory site in the Village of Slinger was selected as the third pilot development.

Local Government Site Readiness Analysis

The initial ranking criteria analysis consisted of a variety of questions related to conceptual design, plan/code compliance, owner type, and utilities. The Workgroup also established sub-ranking criteria for the top 20 sites related to preliminary work on the site. Scores were weighted based on the importance of each factor as decided by the Workgroup. After the criteria were finalized on the June 6th meeting, the Workgroup representative received an excel sheet with the site readiness analysis to fill out for each of the sites in their municipality. The local government representatives were asked to complete this excel sheet and send it back to the Community Development Department to compile and enter the data into the final criteria sheet. Below are the questions that each of the municipal representatives answered for each site.

Initial Ranking Criteria Questions

- Are rental properties proposed for this site? If yes, what percentage of the site will be rentals? (No points)
- Rank all your inventory sites on priority. Your top priority site will receive a score of 5 in the criteria ranking.
- Has the concept plan been reviewed internally by staff? (1 point)
- Has the concept plan gone through municipal approval? (2 points)
- Is there intention for the inventory site to be within a zoning district that has a lot size of 8,000 sq ft or smaller? (2 points)
- Is the housing development consistent with your Comprehensive Plan? (1 point)
- Is the site within the Sewer Service Area? Within the Village of Germantown, is it within the Planned Sewer Service Area? (3 points)
- Are Utilities located to the site? (5 points)
- Is gravity sewer available to frontage? (1 point)
- Is City/Village willing to arrange for installment of utilities? (3 points)
- Is the site owned by the Public, a Housing Developer Under Contract, or a Non-Developer?
 - Public or Housing Developer Under Contract (2 points)
 - Non-Developer (0 points)

Sub-Ranking Criteria Questions

- Has an ALTA survey been completed on the site? (1 point)
- Have soil tests been completed on the site and soils are suitable for development? (1 point)
- Has a wetland delineation or floodplain analysis completed on the site within the last 5 years? (1 point)
- Have there been discussions on Sewer and Water Connection with Public Works or equivalent? (1 point)
- Has a stormwater management plan for the site been drafted? (1 point)

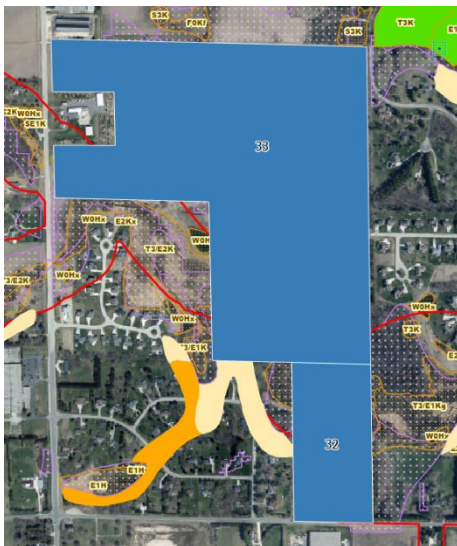
Developable Area Analysis

County Staff completed the developable area analysis for each site using important environmental factors that were incorporated into the initial ranking criteria. Using ArcGIS Pro, staff collected environmental information that included:

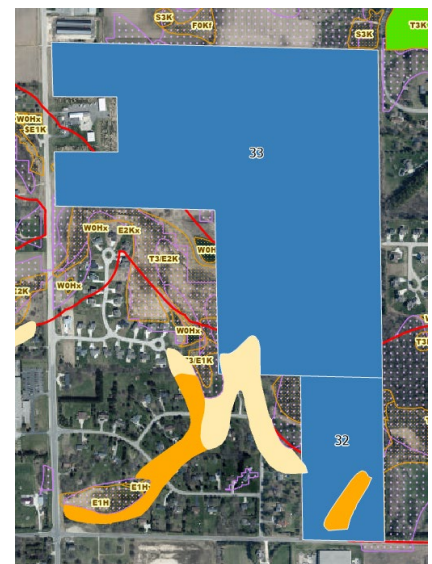
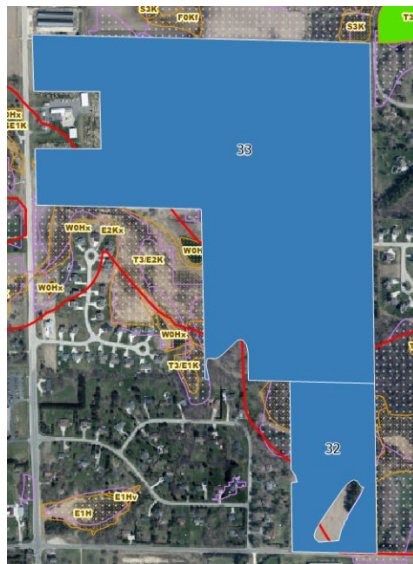
- DNR Wetlands layer
- Floodplain
- Slopes over 20%
- Primary Environmental Corridors and Isolated Natural Resource Areas
- SSURGO Soils layer (reviewing the Hydric Attribute only)

Using the Pairwise Erase Tool, the Site Inventory Target Sites layer was entered into the tool as well as the environmental factors selected for the developable area analysis. The successful output of this analysis is the Inventory Sites Layer with the environmental factor excluded from the area, creating “holes” in the sites. Below is an example of a successful analysis erasing steep slope.

Before Erase Tool:



After Erase Tool:



The Inventory Site layer with the “holes” from the successful analysis would then be entered into the Pairwise Tool with another environmental factor to be run, causing the area to be extracted from the site. This was completed on all the environmental factors selected by the Workgroup. The process for erasing each of the features is listed step by step.

1. Original Target Sites layer – Erase -- 20% slope or more data layer
2. Target Site 20% slope or more analysis layer – Erase -- PEC/INRA data layer
3. Target Site PEC/INRA analysis layer – Erase -- SSURGO Soils data layer (Hydric Attribute)
4. Target Site SSURGO Soils analysis layer (Hydric Attribute) – Erase -- 100-year flood data layer
5. Target Site 100-year flood analysis layer – Erase -- DNR Wetlands data layer (digitized by staff over the original layer)
6. Final Target Sites layer showing the developable area with the environmental factors removed from the layer

After the developable area analysis was completed, a field was created within the Final Target Sites layer to calculate the acres remaining. Once that was complete, staff compared the acres remaining to the Original Target Sites layer to calculate the percentage of the developable area for each of the sites. Scores were given on a range of 0-4 depending on the percentage of developable area.

Developable Area Analysis Scores:	
100%-76% Developable	4
75%-51% Developable	3
50%-26% Developable	2
25%-1% Developable	1
0% Developable	0 (review the site for compatibility)

Final Ranking

The ranking analysis with both the responses from the municipal representatives and the developable area analysis was compiled in a Microsoft Excel sheet. The answers from the municipalities were entered into the sheet with the specified formulas for questions and scores for the initial and sub-ranking criteria. The highest score that could be received from the initial ranking was 29 points. With the sub-ranking criteria applied, the highest possible score was 34 points. The top 5 sites are shown below based on the criteria analysis.

NGH Inventory Sites with Sub-Ranking Criteria						
Rank	Score with Sub-Ranking	Label	Tax ID	Parcels within Site	Municipality	Development Type
1	31	46	V5_0679, V5_067500X	2	Village of Slinger	Single/Multi Family
2	26	21	GTNV_224965	1	Village of Germantown	Multi Family
3	24	1a	291_11193620003, 291_11193620001	2	City of West Bend	Single Family
4	23	15	36_0903001001, 36_0903001002, 36_0903001003, 36_0903001004	4	City of Hartford	Single Family
5	23	36	V4_0347, V4_0348, V4_0349, V4_0350, V4_0353, V4_0352	6	Village of Kewaskum	Multi Family

The Village of Slinger site had the highest score with 31 points. As stated throughout the process, the third pilot site will be selected through the inventory ranking analysis.

Next Steps

The third pilot site has been selected as a result of the inventory analysis that was completed. The three pilot sites are:

- ❖ Village of Jackson Site
- ❖ City of Hartford/HADC Site
- ❖ Village of Slinger Site

The Next Generation Housing Inventory should be reviewed annually or as requested by the Next Generation Housing Committee. If additional funding becomes available for pilot development sites, the inventory ranking process should be repeated with the same ranking criteria by the Next Generation Housing Inventory Workgroup with updated site information.



WASHINGTON
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