

Vote Record

Senate Committee on Economic Development, Housing and Government Operations

Date: 3-21-00
Moved by: Drz Seconded by: Zien
AB: _____ Clearinghouse Rule: _____
AB: _____ SB: 352 Appointment: _____
AJR: _____ SJR: _____ Other: _____
A: _____ SR: _____

A/S Amdt: _____
A/S Amdt: _____ to A/S Amdt: _____
A/S Sub Amdt: _____
A/S Amdt: _____ to A/S Sub Amdt: _____
A/S Amdt: _____ to A/S Amdt: _____ to A/S Sub Amdt: _____

Be recommended for:

- Passage
- Introduction
- Adoption
- Rejection

- Indefinite Postponement
- Tabling
- Concurrence
- Nonconcurrence
- Confirmation

Committee Member

Sen. Robert Wirch, Chair
Sen. Gwendolynne Moore
Sen. Richard Grobschmidt
Sen. Gary Drzewiecki
Sen. David Zien

<u>Aye</u>	<u>No</u>	<u>Absent</u>	<u>Not Voting</u>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Totals: _____

Motion Carried

Motion Failed

SENATE HEARING SLIP

(Please Print Plainly)

DATE: S-21-06

BILL NO. SB 352

OR
SUBJECT Heritage Trust

Sen. Bob Janch
(NAME)

(Street Address or Route Number)

(City and Zip Code)

25th Senate District
(Representing)

Speaking in Favor:

Speaking Against:

Registering in Favor:
but not speaking:

Registering Against:
but not speaking:

Speaking for information only; Neither for nor against:

Please return this slip to a messenger PROMPTLY.

Senate Sergeant-At-Arms
State Capitol - B35 South
P.O. Box 7882
Madison, WI 53707-7882

SENATE HEARING SLIP

(Please Print Plainly)

DATE: 3/21/2000

BILL NO. Senate 352

OR
SUBJECT Heritage Trust

Alicia Goehring
(NAME)

(Street Address or Route Number)

(City and Zip Code)

Madison
State Historical Society
(Representing)

Speaking in Favor:

Speaking Against:

Registering in Favor:
but not speaking:

Registering Against:
but not speaking:

Speaking for information only; Neither for nor against:

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State Capitol - B35 South
P.O. Box 7882
Madison, WI 53707-7882

SENATE HEARING SLIP

(Please Print Plainly)

DATE: 3/21/00

BILL NO. 690 352

OR
SUBJECT _____

Tim Freemery
(NAME)

(Street Address or Route Number)

(City and Zip Code)

Mineral Point 53865
self
(Representing)

Speaking in Favor:

Speaking Against:

Registering in Favor:
but not speaking:

Registering Against:
but not speaking:

Speaking for information only; Neither for nor against:

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State Capitol - B35 South
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Madison, WI 53707-7882

SENATE HEARING SLIP

(Please Print Plainly)

DATE: 3/21/00

BILL NO. 352

OR
SUBJECT _____

ROBT. GRISHABER

(NAME) 213 COMMERCE ST.

(Street Address or Route Number)

MINERAL POINT, 53565

(City and Zip Code)

(Representing)

Speaking in Favor:

Speaking Against:

Registering in Favor:

but not speaking:

Registering Against:

but not speaking:

Speaking for information only; Neither for nor against:

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Senate Sergeant-At-Arms
State Capitol - B35 South
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Madison, WI 53707-7882

300SE

SENATE HEARING SLIP

(Please Print Plainly)

DATE: 21 MARCH 2000

BILL NO. Senate Bill 352

OR
SUBJECT _____

Sen. Fred Risser

(Name) 220 South Capitol

(Street Address or Route Number)

(City and Zip Code)

(Representing)

Speaking in Favor:

Speaking Against:

Registering in Favor:

Registering Against:

Speaking for information only; Neither for nor against:

Please return this slip to a messenger PROMPTLY.

Senate Sergeant at Arms
Room 204-S
State Capitol
Madison, Wisconsin 53702

SENATE HEARING SLIP

(Please Print Plainly)

DATE: MARCH 21, 2000

BILL NO. S13352

OR
SUBJECT _____

Trust Program

(NAME) MICHAEL HAMER

(Street Address or Route Number), 1

Wisc. Trust For Hist. Presrv

(City and Zip Code) Madison

(Representing) 23 N. Kinross St.

Speaking in Favor:

Speaking Against:

Registering in Favor:

but not speaking:

Registering Against:

but not speaking:

Speaking for information only; Neither for nor against:

Please return this slip to a messenger PROMPTLY.
Senate Sergeant-At-Arms
State Capitol - B35 South
P.O. Box 7882
Madison, WI 53707-7882

SENATE HEARING SLIP

(Please Print Plainly)

DATE: 3.21.06
BILL NO. ~~352~~ 352
OF SB
SUBJECT _____

Rep. Steve Freese
(NAME)

(Street Address or Route Number)

(City and Zip Code)

(Representing)

Speaking in Favor:
Speaking Against:
Registering in Favor:
but not speaking:
Registering Against:
but not speaking:
Speaking for information only; Neither for nor against:

Please return this slip to a messenger PROMPTLY.
Senate Sergeant-At-Arms
State Capitol - B35 South
P.O. Box 7882
Madison, WI 53707-7882

SENATE HEARING SLIP

(Please Print Plainly)

DATE: 3/20/00
BILL NO. S-352
OF _____
SUBJECT _____

DAVE CIESLEWICZ
(NAME)
16 N. CAMOU S 5870
(Street Address or Route Number)
MADISON 53703
(City and Zip Code)
1000 Friends of WI
(Representing)

Speaking in Favor:
Speaking Against:
Registering in Favor:
but not speaking:
Registering Against:
but not speaking:
Speaking for information only; Neither for nor against:

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Senate Sergeant-At-Arms
State Capitol - B35 South
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Madison, WI 53707-7882

SB-352

The Wisconsin Heritage Trust Program: The Sesquicentennial's Legacy to Save Wisconsin's Historic Treasures

Saving the Best of the Last 150 Years for the Next 150 Years: A Public-Private Partnership

Wisconsin is rapidly losing its historic treasures. Already, 80% of the state's archaeological sites have been destroyed or severely damaged and approximately 400 historic properties are lost every year. The formation of the Heritage Trust Program is an effort to put a stop to this widespread degradation of our heritage, to save the places that define who we are, and to protect the places that make Wisconsin *Wisconsin*.

The Wisconsin Heritage Trust Program was conceived following the Sesquicentennial as a tangible way to build upon the enthusiasm and pride evident throughout the state in 1998. It is a legacy fund to support the work of our citizens in their efforts to preserve our heritage for generations to come.

The program would be established by a one-time authorization of \$20 million over a 10-year period. The fund would provide \$15 million in preservation grants over 10 years and \$5 million in seed money to create a major endowment generating preservation grants and low-interest loans in perpetuity. The 10-year program would be administered by the State Historical Society of Wisconsin while the endowment would be established and administered by the Wisconsin Trust for Historic Preservation.

Support for the formation of this program was generated by the Wisconsin Historic Preservation Partners, an alliance of eight statewide organizations with a combined membership of 8,000. The organizations are: The State Historical Society of Wisconsin, Barns N.O.W! (Network of Wisconsin), the Department of Commerce's Main Street Program, the Department of Tourism's Heritage Tourism Program, 1,000 Friends of Wisconsin, the Wisconsin Archaeological Survey, the Wisconsin Association of Historic Preservation Commissions, and the Wisconsin Trust for Historic Preservation.

One of the program's goals is to act now to preserve those places and objects that represent the unique character of Wisconsin. Recipients of funds would include units of government and nonprofit organizations. Funds would be used to acquire, protect, or restore buildings, bridges, archaeological sites, landscapes and museum sites and collections. Over the next 10 years the program could support and safeguard approximately 20 projects each year and benefit the historic resources of every county in the state.

The other goal is to create a substantial endowment by a modest contribution of public seed money with which to attract private donations. The objective is to build the endowment quickly to at least \$10 million with private donations to exceed the public contribution within 10 years.

By working together, Wisconsin's public and private leaders will enable the state's nonprofit and government organizations to save our state's irreplaceable heritage.

Examples of potentially eligible projects include:

St. Augustine's Church
Crosse House
Mitchell-Rountree Cottage
Ager House
Kenosha Lighthouse and Keepers Cottage
Fairlawn
Mabel Tainter Memorial Building
Brown County Courthouse
Marinette County Courthouse
Medford Public Library
Hearthstone (historic house museum)
Oshkosh Public Museum
Plum Grove Church
Turner Hall
Taliesin
Temple Theater
Former Pepin County Courthouse
Former Polk County Courthouse
Former Ozaukee County Courthouse
Former Florence County Jail
Former Marquette County Jail
Ten Chimneys
Our Lady of Loretto Church
Potawatomi Spring House
Lutze Housebarn
Interurban Car 26
Grand Theater
Band Shelter in Wittenberg
Schwartz Ballroom
Sharon Opera House
Al Ringling Theatre
Gimpfel Brewery
Herbster Gym
Harnisfeger House
Wadham's Oil Company Station (West Allis and Franklin)
Cudahy Depot
Nelson Hall
New Glarus Depot
Green Bay Road Bridge
Freewill Baptist Church
Clarence Shaler Sculptures
Williams Free Public Library
Early statehood buildings owned by Lead Region Historic Trust
Silver Mound Prehistoric Quarries Site
Hensler Petroglyphs
Hulbert Creek Garden Beds
Adams Site (large prehistoric village and mound group)
Heins Creek Site (prehistoric habitation areas)
Fort Winnebago (remains of early 19th century American fort)
Tenney Park
Island Park
Library Park
Calvary Cemetery Chapel
Institute for Paper Chemistry Complex
Temple Zion
Peter Stormonth School
Grignon Mansion
Lafayette County
Dane County
Grant County
Eau Claire County
Kenosha County
Douglas County
Dunn County
Brown County
Marinette County
Taylor County
Outagamie County
Winnebago County
Iowa County
Milwaukee County
Iowa County
Vernon County
Pepin County
Polk County
Ozaukee County
Florence County
Marquette County
Waukesha County
Sauk County
Forest County
Manitowoc County
Sheboygan County
Waupaca County
Shawano County
Washington County
Walworth County
Sauk County
Milwaukee County
Bayfield County
Milwaukee County
Milwaukee County
Milwaukee County
Portage County
Monroe County
Manitowoc County
Waukesha County
Fond du Lac County
Dodge County
Southwest Wisconsin
Jackson County
Dodge County
Sauk County
Pierce County
Door County
Columbia County
Dane County
Racine County
Kenosha County
Milwaukee County
Outagamie County
Outagamie County
Milwaukee County
Outagamie County

2-17-00

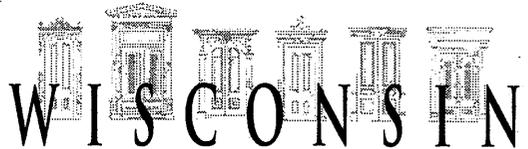
SB 352 -

- Call
- Ed Werner -

↳ Lighthouse restoration?

- Butterbrodt -

- Schedule but
not on 2/17/00



P.O. BOX 110, MADISON, WI 53701-0110 • (608) 255-0348 • FAX (608) 255-0334

MICHAEL HAMER
EXECUTIVE DIRECTOR

1999 SENATE BILL 352

January 27, 2000 - Introduced by Senators JAUCH, RUDE, BURKE, BAUMGART, GROBSCHMIDT, PLACHE, RISSER, ROSENZWEIG, ROBSON and SCHULTZ, cosponsored by Representatives FREESE, SCHOOFF, HUTCHISON, HUBER, BLACK, BERCEAU, J. LEHMAN, RHOADES, RICHARDS, MUSSER, SERATTI, SINICKI, MILLER and NASS. Referred to Economic Development, Housing and Government Operations.

1 AN ACT *to amend* 20.866 (1) (u); *to repeal and recreate* 20.866 (1) (u); and *to*
2 *create* 20.245 (3) (e), 20.866 (2) (zfm) and 44.49 of the statutes; **relating to:**
3 authorizing the state historical society to award grants for the preservation of
4 historic property, granting bonding authority and making appropriations.

Analysis by the Legislative Reference Bureau

This bill creates a heritage trust program to be administered by the state historical society and authorizes the issuance of up to \$20,000,000 in general obligation bonds (up to \$2,000,000 in each of 10 years) for the purposes of the program.

Under the heritage trust program, the historical society must award grants to the state agencies, local governmental units and nonprofit organizations for historic preservation. A grant recipient must provide matching funds equal to 25% of the amount of the grant. The bill authorizes the historical society to award up to \$1,000,000 in grants for this purpose in the 2000-01 fiscal year and up to \$1,500,000 in grants in each of the succeeding nine fiscal years.

The bill also directs the historical society annually to award a grant to the Wisconsin Trust for Historic Preservation under certain conditions: 1) The bylaws of the trust must state that the purpose of the trust is to develop and support statewide initiatives promoting historic preservation and that, if the trust dissolves, it will take all reasonable measures to ensure that moneys paid to the trust under the program revert to the state; and 2) the trust must provide public access to any

SENATE BILL 352

meeting held regarding the awarding of grants as if the trust were a governmental body

The bill provides that the grants awarded to the trust (\$1,000,000 in the 2000-01 fiscal year and \$500,000 in each of the nine succeeding fiscal years) constitute an endowment fund. The trust must use the earnings of the endowment fund to temporarily acquire historic property for the purpose of historic preservation and to award grants to state agencies, local governmental units and nonprofit organizations for the purpose of historic preservation, including historic preservation to commemorate the 200th anniversary of Wisconsin statehood. A grant recipient must provide matching funds equal to at least 25% of the amount of the grant.

For further information see the *state and local* fiscal estimate, which will be printed as an appendix to this bill.

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

1 **SECTION 1.** 20.245 (3) (e) of the statutes is created to read:

2 20.245 (3) (e) *Principal repayment, interest and rebates.* A sum sufficient to
3 reimburse s. 20.866 (1) (u) for the payment of principal and interest costs incurred
4 in financing the grants under s. 44.49, and to make the payments determined by the
5 building commission under s. 13.488 (1) (m) that are attributable to the proceeds of
6 obligations incurred in financing the grants under s. 44.49.

7 **SECTION 2.** 20.866 (1) (u) of the statutes, as affected by 1999 Wisconsin Act 9,
8 section 628, is amended to read:

9 20.866 (1) (u) *Principal repayment and interest.* A sum sufficient from moneys
10 appropriated under sub. (2) (zp) and ss. 20.115 (2) (d) and (7) (b) and (f), 20.190 (1)
11 (c), (d), (i) and (j), 20.225 (1) (c), 20.245 (1) (e), (2) (e) and (j), ~~(3) (e)~~, (4) (e) and (5) (e),
12 20.250 (1) (e), 20.255 (1) (d), 20.275 (1) (er), (es), (h) and (hb), 20.285 (1) (d), (db), (fh),
13 (ih), (kd) and (km) and (5) (i), 20.320 (1) (c) and (t) and (2) (c), 20.370 (7) (aa), (ac), (ag),
14 (aq), (ar), (at), (au), (ba), (ca), (cb), (cc), (cd), (ce), (cf), (ea), (eq) and (er), 20.395 (6) (aq)
15 and (ar), 20.410 (1) (e), (ec) and (ko) and (3) (e), 20.435 (2) (ee) and (6) (e), 20.465 (1)

SENATE BILL 352

1 (d), 20.485 (1) (f) and (go), (3) (t) and (4) (qm), 20.505 (5) (c), (g) and (kc), 20.855 (8)
2 (a) and 20.867 (1) (a) and (b) and (3) (a), (b), (bp), (br), (g), (h), (i) and (q) for the
3 payment of principal and interest on public debt contracted under subchs. I and IV
4 of ch. 18.

5 **SECTION 3.** 20.866 (1) (u) of the statutes, as affected by 1999 Wisconsin Act 9,
6 section 628b, and 1999 Wisconsin Act (this act), is repealed and recreated to read:

7 20.866 (1) (u) *Principal repayment and interest.* A sum sufficient from moneys
8 appropriated under sub. (2) (zp) and ss. 20.115 (2) (d) and (7) (b) and (f), 20.190 (1)
9 (c), (d), (i) and (j), 20.225 (1) (c), 20.245 (1) (e), (2) (e) and (j), (3) (e), (4) (e) and (5) (e),
10 20.250 (1) (e), 20.255 (1) (d), 20.275 (1) (er), (es), (h) and (hb), 20.285 (1) (d), (db), (fh),
11 (ih), (kd) and (km) and (5) (i), 20.320 (1) (c) and (t) and (2) (c), 20.370 (7) (aa), (ac), (ag),
12 (aq), (ar), (at), (ba), (ca), (cb), (cc), (cd), (ce), (cf), (ea), (eq) and (er), 20.395 (6) (aq) and
13 (ar), 20.410 (1) (e), (ec) and (ko) and (3) (e), 20.435 (2) (ee) and (6) (e), 20.465 (1) (d),
14 20.485 (1) (f) and (go), (3) (t) and (4) (qm), 20.505 (5) (c), (g) and (kc), 20.855 (8) (a)
15 and 20.867 (1) (a) and (b) and (3) (a), (b), (bp), (br), (g), (h), (i) and (q) for the payment
16 of principal and interest on public debt contracted under subchs. I and IV of ch. 18.

17 **SECTION 4.** 20.866 (2) (zfm) of the statutes is created to read:

18 20.866 (2) (zfm) *Historical society; heritage trust program.* From the capital
19 improvement fund, a sum sufficient for the historical society to award grants under
20 s. 44.49. The state may contract public debt in an amount not to exceed \$20,000,000
21 for this purpose. The total amount of debt authorized under this paragraph may not
22 exceed the following amounts on the following dates:

- 23 1. Prior to July 1, 2000, \$2,000,000.
- 24 2. July 1, 2000, to June 30, 2001, \$4,000,000.
- 25 3. July 1, 2001, to June 30, 2002, \$6,000,000.

SENATE BILL 352

- 1 4. July 1, 2002, to June 30, 2003, \$8,000,000.
- 2 5. July 1, 2003, to June 30, 2004, \$10,000,000.
- 3 6. July 1, 2004, to June 30, 2005, \$12,000,000.
- 4 7. July 1, 2005, to June 30, 2006, \$14,000,000.
- 5 8. July 1, 2006, to June 30, 2007, \$16,000,000.
- 6 9. July 1, 2007, to June 30, 2008, \$18,000,000.
- 7 10. July 1, 2008, to June 30, 2009, \$20,000,000.

8 **SECTION 5.** 44.49 of the statutes is created to read:

9 **44.49 Heritage trust program. (1) PURPOSE.** The legislature determines
10 that the provision of assistance by the state under this section and the awarding of
11 grants to the Wisconsin Trust for Historic Preservation under this section serve a
12 statewide public purpose by assisting in the protection, restoration and
13 rehabilitation of property located in this state that is significant in the history,
14 prehistory, architecture, archaeology or culture of this state, its rural and urban
15 communities or the nation.

16 **(2) DEFINITIONS.** In this section:

17 (a) "Local governmental unit" has the meaning given in s. 16.97 (7).

18 (b) "Trust" means the Wisconsin Trust for Historic Preservation.

19 **(3) GRANTS TO GOVERNMENTAL UNITS AND NONPROFIT ORGANIZATIONS.** (a) From the
20 appropriation under s. 20.866 (2) (zfm), the state historical society shall award
21 grants to state agencies, local governmental units and nonprofit organizations for
22 historic preservation. A grant recipient shall provide matching funds equal to 25%
23 of the amount of the grant, except that the state historical society may require a
24 recipient to provide matching funds equal to a higher percentage.

SENATE BILL 352

1 (b) The state historical society shall ensure that all grant recipients under par.

2 (a) comply with the standards for rehabilitation in 36 CFR 67.7.

3 (c) The state historical society may award up to \$1,000,000 in grants under par.

4 (a) in the 2000–01 fiscal year and up to \$1,500,000 in grants under par. (a) in each

5 of the 9 succeeding fiscal years, except that if the state historical society awards less

6 than the maximum amount allowed in any fiscal year the maximum amount allowed

7 in the succeeding fiscal year is increased by an amount equal to the difference

8 between the amount awarded in the current fiscal year and the maximum amount

9 allowed in the current fiscal year.

10 (4) GRANTS TO THE TRUST. (a) Subject to par. (b), the state historical society

11 annually shall award a grant to the trust from the appropriation under s. 20.866 (2)

12 (zfm). In the 2000–01 fiscal year, the amount of the grant shall be \$1,000,000. In

13 each of the 9 succeeding fiscal years, the amount of the grant shall be \$500,000.

14 (b) The state historical society may award a grant under par. (a) only if the

15 following conditions are satisfied:

16 1. The bylaws of the trust state that the purpose of the trust is to develop and

17 support statewide initiatives promoting historic preservation and that, if the trust

18 dissolves, the trust shall in good faith take all reasonable measures to ensure that

19 all moneys paid to the trust under this subsection revert to the state.

20 2. The trust provides public access to any meeting held for the purpose of

21 deliberations regarding the awarding of grants under par. (c) 1. to the same extent

22 as is required of, and subject to the same terms and enforcement provisions that

23 apply to, a governmental body under subch. V of ch. 19.

24 (c) The moneys received under par. (a) shall constitute an endowment fund.

25 The trust shall use the earnings of the endowment fund for the following purposes:

SENATE BILL 352

1 1. To award grants to state agencies, local governmental units and nonprofit
2 organizations for historic preservation, including historic preservation to
3 commemorate the 200th anniversary of Wisconsin statehood. A grant recipient shall
4 provide matching funds equal to 25% of the amount of the grant, except that the trust
5 may require a recipient to provide matching funds equal to a higher percentage.

6 2. To temporarily acquire historic property for the purpose of historic
7 preservation.

8 (d) The trust shall comply, and shall ensure that all grant recipients under par.

9 (c) 1. comply, with the standards for rehabilitation in 36 CFR 67.7.

10 (e) The trust shall contract with an independent certified public accountant to
11 biennially audit the endowment fund. Within 30 days after the completion of each
12 audit, the trust shall submit a detailed report of the audit to the governor and the
13 joint committee on finance.

14 (5) SUNSET. The state historical society may not award a grant under this
15 section after June 30, 2010.

SECTION 6. Appropriation changes; historical society.

17 (1) In the schedule under section 20.005 (3) of the statutes for the appropriation
18 to the state historical society under section 20.245 (3) (a) of the statutes, as affected
19 by the acts of 1999, the dollar amount is increased by \$25,000 for fiscal year 1999–00
20 and the dollar amount is increased by \$50,000 for fiscal year 2000–01 to increase the
21 authorized FTE positions for the historical society by 1.0 GRP position for the
22 performance of services for the heritage trust program.

23 **SECTION 7. Effective dates.** This act takes effect on the day after publication,
24 except as follows:

SB 352 / AB 690

Wisconsin Heritage Trust Program Policy Statements



OVERVIEW

The Wisconsin Heritage Trust will be established following the Sesquicentennial as a tangible way to build upon the enthusiasm and pride evident throughout the state in 1998. It is a legacy fund supporting the work of our citizens to preserve our heritage for generations to come and to commemorate Wisconsin's Bicentennial.

By Wisconsin's 150th year:

- 80% of the State's archaeological sites have been destroyed or severely damaged
- Our icon barns are rapidly disappearing
- Wisconsin loses an estimated 400 plus historic properties every year

We have decided to put a stop to this widespread degradation of our heritage, to save the places that define who we are, and that make Wisconsin Wisconsin.

Senator Bob Jauch and Representative Stephen Freese (Sponsors), and many other legislative colleagues, the major statewide historic preservation organizations listed (combined membership over 8,000), and numerous private and public sector leaders identified the urgent need for a program to safeguard Wisconsin's irreplaceable heritage.

- The State Historical Society of Wisconsin
- Wisconsin Heritage Tourism (Dept. of Tourism)
- Wisconsin Archaeological Survey and Society
- Wisconsin Main Street (Dept. of Commerce)
- Barns N.O.W! (Network of Wisconsin)
- 1000 Friends of Wisconsin
- Wisconsin Association of Historic Preservation Commissions
- Wisconsin Trust for Historic Preservation

PROGRAM

The Wisconsin Heritage Trust will be established by a one time authorization of \$20 million over a 10-year period. The fund will provide \$15 million in preservation grants over 10 years and \$5 million in seed money to create a major endowment generating preservation grants and low interest loans in perpetuity. The 10 year program will be administered by the State Historical Society while the endowment will be established and administered by the Wisconsin Trust for Historic Preservation.

MISSION

The mission of the Wisconsin Heritage Trust is to promote our heritage by providing support to projects that serve the public good by saving important prehistoric and historic places, and that protect our unique cultural heritage.

GOALS

- Preserve those places and objects representing the unique character of Wisconsin.
- Ensure the availability of support in perpetuity by creating a substantial endowment by a modest contribution of public seed money with which to attract private donations.
- Provide a source of funds for the commemoration of Wisconsin's Bicentennial.

CRITERIA

The determination of eligibility for program support will be based on two sets of criteria:

Place or Property

- Rare and/or distinct
- Endangered through neglect or impending destruction
- Responsive to appropriate public access
- Contributes to the telling and the revitalizing of Wisconsin's history statewide
- Catalyst for related benefits in the surrounding area

Applicant/Owner

- Demonstration of need and lack of other sources of funding
- Ability to sustain the project after completion
- Evidence of matching support
- Demonstration of community, units of government
- Non-profit organizations and units of government.

Recipient selection will be made by a panel composed of representatives from the statewide organizations identified above.

RESULTS

Over the next fifty years, the Wisconsin Heritage Trust Program is projected to:

- Support and safeguard about 20 projects per year
- Directly benefit the historic resources of every county in the state
- Create a permanent endowment of \$35 million, or more, with all but 20% originating from private contributions and accrued interest
- Distribute an estimated \$55 million to safeguard and revitalize Wisconsin's heritage

With a commitment of \$20 million in 2000, the State will generate disbursements of \$55 million statewide and create a \$35 million endowment for the preservation of Wisconsin's heritage and identity for generations to come.

Wisconsin Heritage Trust Endowment

Projections of Capital Sum Invested plus Disbursements Available from Accrued interest

After 5 years
Capital est. \$4 million
(\$3 million public + \$1 million private donations)
Annual Disbursement available - \$200,000

After 25 years
Capital est. \$20 million
(\$5 million public + \$15 million private donations)
Annual Disbursement available - \$1 million

After 10 years
Capital est. \$9 million
(\$5 million public + \$4 million private donations)
Annual Disbursement available - \$450,000

After 50 years
Capital est. \$35 million
(\$5 million public + \$30 million private donations)
Annual Disbursement available - \$1,750,000

Total Endowment Interest Dispersed after 25 years - Over \$13.5 million

Total Endowment Interest Disbursed after 50 years - Over \$40 million (i.e. eight times the State's original \$5 million investment with the capital sum remaining intact)

Notes:

- No allowance made for reinvestment of any interest generated over and above annual grant and loan commitments.
- Projected annual disbursements assume 5% return on capital investment.
- No allowance included for repayments of low interest preservation loans.

The above projections are thus potentially conservative in terms of the capital sum and the interest available for disbursement. Projections of private sector donations have been reviewed by other parties and are considered reasonably attainable.

SB 352 / AB 690

Wisconsin Heritage Trust Program Policy Statements



OVERVIEW

The Wisconsin Heritage Trust will be established following the Sesquicentennial as a tangible way to build upon the enthusiasm and pride evident throughout the state in 1998. It is a legacy fund supporting the work of our citizens to preserve our heritage for generations to come and to commemorate Wisconsin's Bicentennial.

By Wisconsin's 150th year:

- 80% of the State's archaeological sites have been destroyed or severely damaged
- Our Icon barns are rapidly disappearing
- Wisconsin loses an estimated 400 plus historic properties every year

We have decided to put a stop to this widespread degradation of our heritage, to save the places that define who we are, and that make Wisconsin Wisconsin.

Senator Bob Jauch and Representative Stephen Freese (Sponsors), and many other legislative colleagues, the major statewide historic preservation organizations listed (combined membership over 8,000), and numerous private and public sector leaders identified the urgent need for a program to safeguard Wisconsin's irreplaceable heritage.

- The State Historical Society of Wisconsin
- Wisconsin Heritage Tourism (Dept. of Tourism)
- Wisconsin Archaeological Survey and Society
- Wisconsin Main Street (Dept. of Commerce)
- Barns N.O.W! (Network of Wisconsin)
- 1000 Friends of Wisconsin
- Wisconsin Association of Historic Preservation Commissions
- Wisconsin Trust for Historic Preservation

PROGRAM

The Wisconsin Heritage Trust will be established by a one time authorization of \$20 million over a 10-year period. The fund will provide \$15 million in preservation grants over 10 years and \$5 million in seed money to create a major endowment generating preservation grants and low interest loans in perpetuity. The 10 year program will be administered by the State Historical Society while the endowment will be established and administered by the Wisconsin Trust for Historic Preservation.

MISSION

The mission of the Wisconsin Heritage Trust is to promote our heritage by providing support to projects that serve the public good by saving important prehistoric and historic places, and that protect our unique cultural heritage.

GOALS

- Preserve those places and objects representing the unique character of Wisconsin.
- Ensure the availability of support in perpetuity by creating a substantial endowment by a modest contribution of public seed money with which to attract private donations.
- Provide a source of funds for the commemoration of Wisconsin's Bicentennial.

CRITERIA

The determination of eligibility for program support will be based on two sets of criteria:

Place or Property

- Rare and/or distinct
- Endangered through neglect or impending destruction
- Responsive to appropriate public access
- Contributes to the telling and the revitalizing of Wisconsin's history statewide
- Catalyst for related benefits in the surrounding area

Applicant/Owner

- Demonstration of need and lack of other sources of funding
- Ability to sustain the project after completion
- Evidence of matching support
- Demonstration of community, units of government
- Non-profit organizations and units of government.

Recipient selection will be made by a panel composed of representatives from the statewide organizations identified above.

RESULTS

Over the next fifty years, the Wisconsin Heritage Trust Program is projected to:

- Support and safeguard about 20 projects per year
- Directly benefit the historic resources of every county in the state
- Create a permanent endowment of \$35 million, or more, with all but 20% originating from private contributions and accrued interest
- Distribute an estimated \$55 million to safeguard and revitalize Wisconsin's heritage

With a commitment of \$20 million in 2000, the State will generate disbursements of \$55 million statewide and create a \$35 million endowment for the preservation of Wisconsin's heritage and identity for generations to come.

Wisconsin Heritage Trust Endowment

Projections of Capital Sum Invested plus Disbursements Available from Accrued interest

After 5 years Capital est. \$4 million (\$3 million public + \$1 million private donations) Annual Disbursement available - \$200,000	After 10 years Capital est. \$9 million (\$5 million public + \$4 million private donations) Annual Disbursement available - \$450,000
After 25 years Capital est. \$20 million (\$5 million public + \$15 million private donations) Annual Disbursement available - \$1 million	After 50 years Capital est. \$35 million (\$5 million public + \$30 million private donations) Annual Disbursement available - \$1,750,000

Total Endowment Interest Dispersed after 25 years - Over \$13.5 million

Total Endowment Interest Disbursed after 50 years - Over \$40 million (i.e. eight times the State's original \$5 million investment with the capital sum remaining intact)

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