



Innovation Grants

WI Dept of Revenue | State and Local Finance Division
Wisconsin City/County Management Association – June 27, 2025

Valeah Foy

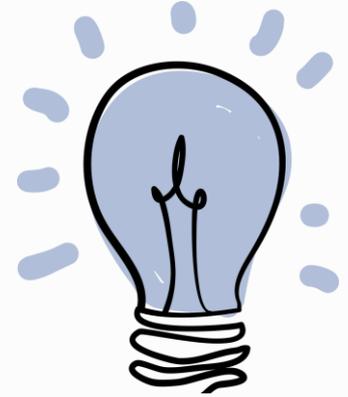
- ▷ Administrator
State and Local Finance Division

Experience/History

- 22 years in finance
- 14 years at DOR
- Bachelor's degree – business, finance
- Masters of business administration – finance, international mgmt.
- Enjoys – all sports

Agenda

- ▷ SLF updates
- ▷ MyDORGov enhancement
- ▷ Innovation grant
 - Overview
 - Filing process
- ▷ Q&A



SLF Updates



State and Local Finance Division (SLF)

- ▷ District offices – Eau Claire, Green Bay, Madison, Milwaukee, and Wausau
- ▷ Manufacturing and utility bureau
- ▷ Equalization bureau
- ▷ Office of technical and assessment services
- ▷ Local government services
- ▷ Administration



MOE Filing Reminder

- ▷ Maintain a level of law enforcement, fire, and emergency medical services equivalent to the previous year
 - Comparing 2024 to 2023
- ▷ Attain completed law enforcement, fire, or EMS certifications
- ▷ Submit MOE Report to DOR (Form SL-305) **by July 1, 2025**
- ▷ Penalty – reduction of total county and municipal aid and supplemental county and municipal aid by 15% in the following year

MyDORGov Enhancement



MyDORGov Access

- ▷ Prior
 - File on your behalf
- ▷ **Current – NEW!**
 - View
 - Edit
 - All access



MyDORGov Access



- ▷ Click the "user information" box
- ▷ In "Your Access Summary" on the bottom right, you can:
 - Review access – click the "i" icon to see the list of forms and access type for each user
 - Change access – click the pencil icon to adjust the access level
 - Check the appropriate boxes to change the access
 - Click update
- ▷ Remember – a user can only have one type of access for each form

user information

Edit your user profile and manage your office/access

form filing

SL-302M - Municipal Official Contact Information

historical filings

View previously submitted forms

notifications

View recent messages (139 new)

online help

View common questions, how-to videos, DOR contact information, and other helpful resources

reset account

Log out of your account to log in with another email address



Edit User Profile

Request Office

Request Access

Manage Software Tokens

User Profile ?

Email:

Name:

Phone:

Fax:

Address:

Your Office Summary (granted by DOR) ?

Current offices held

✖	CLERK/TREASURER	01002	TOWN OF TEST
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Your Access Summary (granted by officeholder) ?

Pending requests on behalf of

✖	Cynthia Test	CLERK/TREASURER	01002	TOWN OF TEST
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Others authorized on your behalf

✖	Jason Test	?	01002	TOWN OF TEST
		Clerk/Treasurer		
✖	Ann Test	?	01002	TOWN OF TEST
		Clerk/Treasurer		
✖	John Test	?	01002	TOWN OF TEST
		Clerk/Treasurer		

Action Needed

Select the appropriate form and access type for this requestor: ?

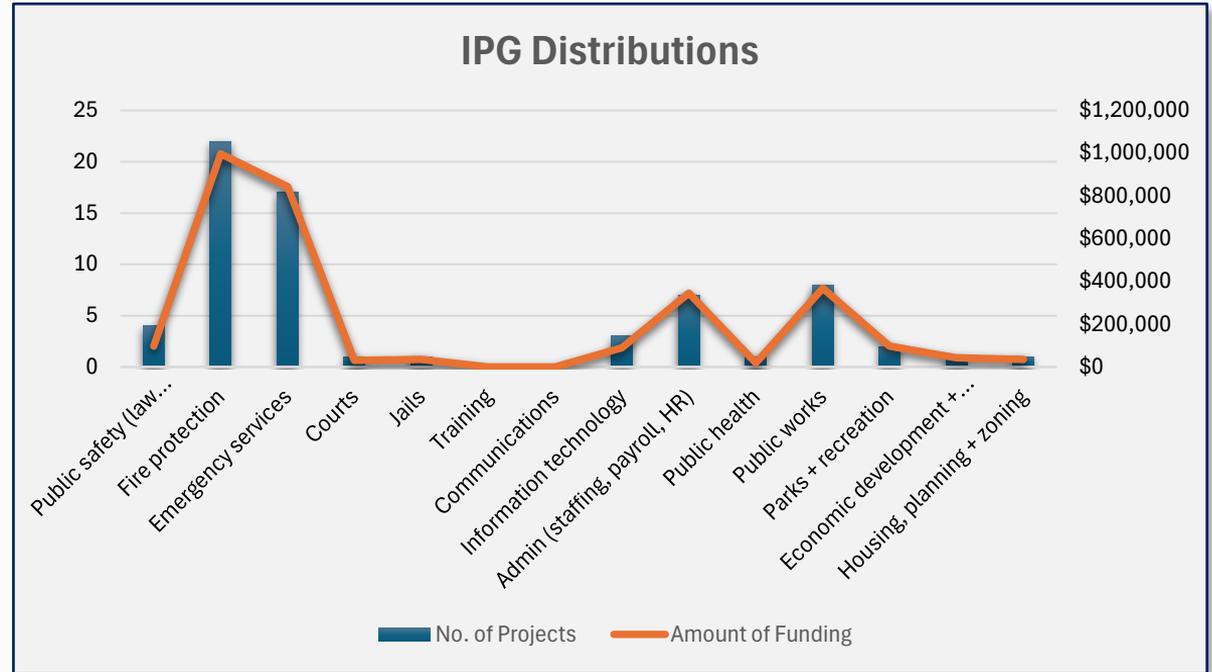
	View	Edit	All Access	Form
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All (current and future forms)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(AT-827) Municipal Retail License Report
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(BOR-C) Open Book and Board of Review Calendar
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(LC-663M) Municipal Lottery Credit Audit Review

Innovation Grants



Innovation Planning Grant

- ▷ Approx. \$3M distributed
- ▷ 68 projects



Innovation Grant

- ▷ \$300M available – for counties, municipalities, and tribes
- ▷ **Innovation plan** – agreement/contract to transfer a service/duty to another:
 - County, municipality, tribe, non-profit organization, or private entity
- ▷ Allowable service/duty
- ▷ Realize total cost savings of at least 10%

Allowable Services

- ▷ Public safety (law enforcement)
- ▷ Fire protection
- ▷ Emergency services
- ▷ Courts
- ▷ Jails
- ▷ Training
- ▷ Communications
- ▷ Information technology
- ▷ Admin (staffing, payroll, HR)
- ▷ Public health
- ▷ Public works
- ▷ Parks + recreation
- ▷ Economic development + tourism
- ▷ Housing, planning + zoning

Contract Requirements

- ▷ Review sec. [79.038\(1\)\(a\)1.](#), Wis. Stats.
- ▷ Detail the service/duty being transferred
- ▷ Date – after DOR’s admin rule notice on November 13, 2024
- ▷ Include pre- and post- transfer costs
- ▷ Allocation of grant monies

Cost Savings Requirements

- ▷ Based on total cost of providing the service/duty pre-transfer
- ▷ Achieve 10% cost savings
 - 50% within 24 months from the first grant payment
 - 100% within 36 months from the first grant payment
- ▷ DOR must audit after 24 months

Payment Distributions

- ▷ 3 annual payments
- ▷ Including only counties, municipalities or tribes
 - Each payment = 25% of total cost excluding highest cost
- ▷ Transfer to non-profit or private entity
 - Each payment = 25% of total cost
- ▷ Allocations outlined in contract

No more than
\$10M per year

How does it work?



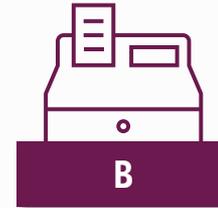
Scenario One



Transfer
between local
governments

Total cost (\$8k + \$10k)	\$18,000
Required cost savings (\$18k * 10%)	\$1,800
Grant payment (\$8k * 25%)	\$2,000
x 3 years	\$6,000

Scenario Two



Transfer to private entity or non-profit

Total cost	\$10,000
Required cost savings ($\$10k * 10\%$)	\$1,000
Grant payment ($\$10k * 25\%$)	\$2,500
x 3 years	\$7,500

Scenario Three



Transfer
between local
governments

Total cost ($\$75k + \$60k + \$40k + \$100k$)	\$275,000
Required cost savings ($\$275k * 10\%$)	\$27,500
Grant payment ($\$275k - \$100k$) * 25%	\$43,750
x 3 years	\$131,250

Scenario Four



Transfer to private entity or non-profit

Total cost (\$80k + \$50k + \$30k)	\$160,000
Required cost savings (\$160k * 10%)	\$16,000
Grant payment (\$160k * 25%)	\$40,000
x 3 years	\$120,000

Filing Process



Filing Process

- ▷ Form SL-405 – Innovation Grant Application
 - Available mid-July
 - Clerk can e-file in [MyDORGov](#)
- ▷ Due: March 31, 2026
- ▷ DRAFT form used today



Filing Instructions

1. Verify the district information below
2. As you complete the form:
 - Follow the form instructions on the right side panel
 - Check for accuracy
 - Save periodically
3. Attach documents if required
4. Click "Submit" when the form is complete
5. Before exiting, print and/or save a copy for your records (including your confirmation number)

Filing deadline - March 31, 2026

Questions?

- General filing - [review our online filing help](#)
- Form information
 - [Common questions](#)
 - lgs@wisconsin.gov
 - (608) 266-1932
 - (608) 266-5815

District Information

District

Year

Report type

Exit

Start Filing

Section A — Innovation Plan Contract and Service Type ☰

Contract/Agreement

All parties to the contract/agreement must sign the innovation plan contract/agreement:

1. Does your innovation plan include a contract/agreement signed by all parties to the contract?  * Yes
 No

2. Attach *
- Copy of signed contract/agreement
 - Additional documentation outlining the innovation plan

3. Enter the project name  *

Service and Duty Information

4. Select the service type you plan to transfer (sec [79.038\(1\)\(b\)](#), Wis. Stats.)  *

5. Are you transferring all or part of the selected service type? * All
 Part

6. Does your signed contract/agreement transfer all services or duties for a period of at least six years?  * Yes
 No

Section A — Innovation Plan Contract and Service Type

3. Enter the project name 

Service and Duty Information

4. Select the service type you plan to transfer (sec [79.038\(1\)\(b\)](#), Wis. Stats.) 

5. Are you transferring all or part of the selected service type?

- All
 Part

6. Does your signed contract/agreement transfer all services or duties for a period of at least six years? 

- Yes
 No

Signature and Service Transfer Dates

Enter the applicable dates below:

7. Enter the signature date of your signed contract/agreement 

8. Enter the date the service/duty will be transferred per the signed contract/agreement

Calendar year immediately preceding the transfer date outlined in your signed contract/agreement 

Section B — Parties to the Contract

Transferors

Transferor's entity type COUNTY



Transferor's entity * 23999 - COUNTY OF GREEN

Transferor's entity type MUNICIPALITY



Transferor's entity * 01002 - ADAMS COUNTY - TOWN OF ADAMS

+ Add

Transferees

Transferee's entity type * NONPROFIT ORGANIZATION ▾



Transferee's entity * *Enter entity name*

Transferee's FEIN (not SSN) * ##-#####

Section C1 — Transferor Contract Requirements (01002 - ADAMS COUNTY - TOWN OF ADAMS) ≡

1. For the portion of the service/duty being transferred by this transferor, did the transferor provide all the services/duties in calendar year 2024, which is the year immediately preceding the transfer?  Yes No

2. Enter this transferor's total cost to provide the service/duty during calendar year 2024, which is the year immediately preceding the transfer...

Attach documentation supporting this amount (ex: cost summary, budget documentation).....

3. Enter the amount this transferor will pay the transferee(s) to perform the service/duty for:

a. First year after the transfer.....

b. Entire term of the contract/agreement .....

ck Section D1 — Transferee Contract Requirements (20999 - COUNTY OF FOND DU LAC) ☰

1. Enter this transferee's total cost to provide the service/duty during calendar year 2024, which is the year immediately preceding the transfer *



Attach documentation supporting this amount (ex: cost summary, budget documentation)..... * 

Sections B–D Summary

Confirm this information is accurate. If it is incorrect, edit the information entered in Sections B–D.

Transferors	Cost
01999 - COUNTY OF ADAMS	\$ 150,000
Transferees	Cost
20999 - COUNTY OF FOND DU LAC	\$ 210,000
Total cost	\$ 360,000

The total cost listed above is the sum of the costs incurred by all participating transferors and transferees (county, municipality, or tribe) to provide the service/duty in the calendar year immediately preceding the transfer.

Is the total cost amount correct? 

Yes
 No

Section F — Savings Requirements

Total cost (from Sec. E) \$ 360,000

1. Enter the projected cost-savings outlined in the innovation plan \$ 0

2. Enter an explanation detailing how the transfer will achieve the projected cost-savings of at least 10% of the total cost of providing the service/duty

Empty text area for explanation.

Attach documentation supporting the reported projected savings [Attach file](#)

3. Do you certify you will achieve:

3a. Half the projected cost-savings within 24 months of receiving the first grant distribution payment? Yes No

3b. All the projected cost-savings within 36 months of receiving the first grant distribution payment? Yes No

Section G — Grant Allocation

Grant Amount

Transferors		Amount
01999 - COUNTY OF ADAMS		\$ 150,000
Transferees		Amount
20999 - COUNTY OF FOND DU LAC		\$ 210,000
Costs/Payments		Amount
1.	Total cost	\$ 360,000
2.	Excluded cost (<i>district with the highest cost</i>) ?	\$ 210,000
3.	Adjusted total cost (<i>Line 1 minus Line 2</i>)	\$ 150,000
4.	Annual grant payment (<i>Line 3 multiplied by 0.25</i>) ?	\$ 37,500
5.	Total grant payment (over three years) (<i>Line 4 multiplied by 3</i>)	\$ 112,500

Section G — Grant Allocation		
3.	Adjusted total cost (Line 1 minus Line 2)	\$ 150,000
4.	Annual grant payment (Line 3 multiplied by 0.25)	\$ 37,500
5.	Total grant payment (over three years) (Line 4 multiplied by 3)	\$ 112,500

Grant Allocation

Would you prefer to report your grant allocation by grant amount or percentage of grant? Amount
 Percentage

Enter grant allocation below:

- Allocation amounts must equal the annual grant payment amount listed above
- Percentages entered must total 100%

Transferors	Amount
01999 - COUNTY OF ADAMS	* \$ 0.00
Transferees	Amount
20999 - COUNTY OF FOND DU LAC	* \$ 0.00
Total	\$ 0.00

Nonprofit/private entity transferees will not receive a direct distribution of grant funds from the Wisconsin Department of Revenue. Include their distribution amount in the appropriate transferor or transferee's allocation.

Section H — Preparer/Signature Statement

Preparer Information

Name

* Valeah Foy

Title

* Title

Email

* valeah.foy@wisconsin.gov

Phone

* (608) 000-0000

Comments ?

Comments

Attach any applicable documents (optional).....

Attach file



Signature Statement

Under penalties of law, I declare this form and all applicable attachments are true, correct and complete to the best of my knowledge and belief

Do you agree with the statement above?

Yes

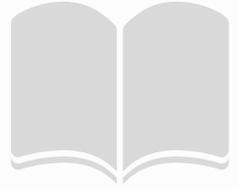
Resources

Resources



- ▷ Innovation grants – revenue.wi.gov/Pages/SLF/IG.aspx
 - Fact sheet
 - Common questions
 - Project examples
 - Fair market compensation guidance
 - Recorded video presentation
 - Apply – Form SL-405

Resources



- ▷ DOR website – revenue.wi.gov
- ▷ Online videos – see [DOR Video Center](#)
 - Select "Govt" tab
 - Ex: MyDORGov, TIF, assessment topics (frac sand, use-value)
- ▷ Reports and notices – revenue.wi.gov/Pages/Report/Home.aspx
- ▷ Governments web page – revenue.wi.gov/Pages/Governments/home.aspx

Resources



- ▷ WI Act 12 Information – DOR summary
revenue.wi.gov/Documents/2023-Act12-Information.pdf
- ▷ WI Act 19 Information – DOR summary
revenue.wi.gov/Documents/2023-Act19-Information.pdf
- ▷ [State and Local Finance Newsletters](#)

Resources



- ▷ Stay informed!
 - Receive **email updates** about law changes, filing reminders, updated reports and notifications
- ▷ To subscribe – revenue.wi.gov/Pages/HTML/lists.aspx
 - Municipal officials, tax professionals, TIF/TID, and many more...
- ▷ County officials – email OTAS@wisconsin.gov

Take Survey

Click link or scan QR code

▷ Link – surveymonkey.com/r/WCMA-6-27-25

▷ QR code



Contact Us

lgs@wisconsin.gov





Mission

Strengthen Wisconsin through fair tax and lottery administration, while educating and serving the public, our customers and communities.

Vision

To be the premier agency in providing innovative, accessible resources, and exceptional customer service built on a foundation of trust, inclusivity and creativity.

Values

- Integrity
- Innovation
- Inclusivity
- Knowledge
- Empathy
- Security