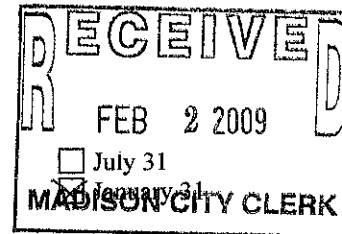


**CITY OF MADISON  
Principal's Expense Statement**



Reporting Period: January 1 through June 30  
July 1 through December 31

Filing Deadline, Indicate Half-Year:

Name of Principal: Smart Growth Greater Madison

Phone No. 608 663-2005

Address: 701 E Washington Ave Madison, WI 53703

Name of Lobbyist: Carole Schaeffer

Lobbyist Phone No. 608-212-5869

Name of Lobbyist

Lobbyist Phone No.

Total lobbying expenditures and obligations did not exceed \$1,000. (If so, proceed directly to Certification.)

Total lobbying expenditures and obligations incurred exceeded \$1,000. \$ 6,720

Is this amount an estimate under Sec. 2.40 (10) (b) MGO? Yes  No

**Disclosure of Lobbying Communications**

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
7/2/08	Judy Compton	1	LEED for TIF	Carole Schaeffer
7/2/08	Economic Dev Commission	1	Econ Dev Plan	
7/8/08	Zoning Code Consultants/Staff	1	Zoning code focus group/developing	
7/8/08	Judy Compton	1	LEED for TIF	

See Page 2 to List Additional Disclosures

**Certification**

I certify that the above is true and correct to the best of my knowledge, information and belief and that I am the registrant or authorized designee. I understand that if I know or believe any of the above information not to be true, I am subject to a forfeiture of \$1,000 or more.

Signature: Carole Schaeffer Title: Executive Director  
Type or print name: Carole Schaeffer  
Date: 1-30-09

Continuation of Disclosures

Name of Principal: Smart Growth Credit Fund  
(SGCM)

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
7/10/08	Barb Constant	1	Inclusionary Zoning	Carole Schaeffer
7/10/08	Ray Harman	1	IZ	
7/11/08	Michael Schumacher	1	IZ	
7/11/08	Michael Schumacher	1	TIF	
7/14/08	Sustainable Design/energy.com	1	LEED for TIF	
7/16/08	Joe Gramacki	1	TIF policy	
7/16/08	TIF Ad Hoc Com	1	TIF policy	
7/16/08	Sally Rhoads-Conway	1	LEED for TIF	
7/17/08	Joel Plant	2	Public safety forum	
7/18/08	Judy Compton	1	wind/solar ordinance	
7/22/08	Al Martin	1	Chap 31 Signage	
7/27/08	Mark Olinger	1	Chap 31 Signage	
7/21/08	Judy Compton	1	wind/solar power	
7/22/08	Joel Plant	1	public safety forum	
7/25/08	IZ oversight committee	1	IZ policy	
7/25/08	TIF Ad Hoc	1	TIF policy	
7/29/08	Mayor	1	Quarterly meeting; development in general	
7/29	Judy Compton	1	Solar/wind power	
7/30	IZ oversight	1	IZ policy	
7/31	Ray Harman	1	IZ policy	
7/31	Judy Compton	1	economic dev plan	
8/5	Joel Plant	1	Public Safety Forum	
8/5	Tim Bruer	1	Public Safety forum	

Continuation of Disclosures

Name of Principal:

SGGM

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
8/6	Economic Dev Comm	1	TIF	Candace Haefliger
8/6	Judy Compton	2	solar/wind ordinance	
8/8	Brenda Konkel	1	IZ	
8/11	Judy Compton	1	wind/solar	
8/11	Lavien Coare	1	wind/solar ordinance	
8/13	Maria Mendez	1	TIF policy	
8/13	Lauren Coare	1	IZ	
8/18	Mark Clear	1	TIF	
8/18	Tim Bruer	1	public safety forum	
8/18	TIF Ad Hoc	1	TIF policy	
8/25	BOE	1	<del>TIF policy</del>	
8/28	Joel Plant	1	public safety forum	
8/29	Michael Okumu	1	IZ/Housing	
9/1	Chris Lawent	1	TIF policy	
9/1	Tripp Widder	1	TIF policy	
9/1	Jed Sandborn	1	TIF policy	
9/2	Joel Plant	1	public safety forum	
9/2	Maria Mendez	1	TIF	
9/2	Judy Compton	3	CARPC (capex reg plan commission)	
9/3	Economic Dev Comm	1	<del>TIF policy</del>	
9/8	BOE	1	<del>TIF policy</del>	
9/10	Common Council	1	Zoning code	
9/11	Zoning code consultants staff	1	ZCRAC for developers forum	

Continuation of Disclosures

Name of Principal: JGGM

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
9/11	Joe Clausius	1	12	Candy Schuster
9/12	12 oversight	1	12	
9/17	Urban Design	1	Signage	
9/22	Michael Heffetz	1	TIF/Zoning	
9/24	Ed Clarke	1	TIF	
9/25	Ray Harman	1	12	
9/25	Judy Compton	1	12	
9/25	Ted Sandborn	1	12	
9/26	Larry Palm	1	12	
9/26	Joe Clausius	1	12	
9/26	ThuyPhan Remmelo	1	12	
10/1	Joe Clausius	1	Parkland credits	
10/1	Michael Schumacher	1	Parkland credits	
10/3	Joe Clausius	1	Parkland Credit	
10/3	Paul Skidmore	1	parkland credits	
10/3	Ray Harman	1	Affordable Housing	
10/7	Tim Brewer	1	TIF / 12	
10/7	Common Council	1	Budget drafting	
10/8	Chris Laurent	1	TIF	
10/8	Kevin Briski	1	Parkland credit	
10/8	Michael Schumacher	1	Parkland credit	
10/8	Joe Clausius	1	Parkland credit	
10/9	Mark Deer	1	12/Housing	

Continuation of Disclosures

Name of Principal: SGGM

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
10/7	Satya Rhodes-Conroy	3	solar/wind power	Carole Johoff
10/10	Satya Rhodes-Conroy	1	green building	
10/10	IZ oversight	1	IZ	
10/14	Mark Clear	1	TIF/IZ	
10/14	Ray Harman	1	IZ	
10/14	Michael Schimone	1	IZ	
10/14	Lawen Chere	1	solar/wind	
10/15	EDC	1	TIF	
10/16	Joel Plant	1	public safety	
10/16	Judy Compton	1	Housing issues	
10/20	Plan Commission	1	Zoning code	
10/22	Judy Compton	1	Solar/wind ad.	
10/23	Paul Meurch	1	TIF/sustainability	
10/29	EDC TIF subcommittee	1	TIF policy	
10/29	Libby Munson	1	IZ	
10/29	Ray Harman	1	IZ	
10/29	Michael Schimone	1	IZ	
10/29	Mark Clear	2	IZ	
10/29	Judy Compton	3	IZ	
10/29	Tim Bruer	2	IZ	
10/29	Joe Clausius	1	IZ	
10/29	Lawen Chere	1	IZ	
11/3	EDC TIF policy comm	1	TIF policy	

Continuation of Disclosures

Name of Principal: SGGM

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
11/3	Ray Harmon	1	IZ	Carrick Shaw
11/3	Mark Clear	1	TIF	
11/3	mark Clear	1	IZ	
11/3	Joel Plant	1	IZ	
11/3	Judy Compton	1	IZ	
11/5	Paul Muench	1	TIF/Zeroac Sustainability	
11/7	Mark Clear	1	IZ	
11/7	Tim Brewer	1	IZ	
11/5	EDC	1	TIF policy	
11/7	Joe Gramacki	2	TIF	
11/11	Ray Harmon	1	Housing Diversity Committee	
11/11	Mark Clear	1	Housing Diversity Com.	
11/11	Rodney Strouck Nelson	1	Housing Diversity	
<del>10/22</del>	<del>Robert [unclear]</del>			
11/12	Judy Compton	1	Housing Diversity	
11/12	Brenda Konrad	1	TIF policy	
11/12	Sue Gramacki	1	TIF policy	
11/13	Mano Mendira	1	TIF policy	
11/15	Judy Compton	1	LEED / green building	
11/20	Joel Plant	1	Housing / public safety	
11/20	Paul Muench	1	TIF	
11/20	Ed Clarke	1	TIF	
11/24	Mano Mendira	1	TIF	

Continuation of Disclosures

Name of Principal: SGGM

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist	
11/24	Judy Compton	1	Housing Diversity	Candice Schaeffer	
11/25	Paul Skidmore	1	Dockland		
11/25	Kevin Bristol	1	Dockland		
11/25	Matt Tucker	1	Signage		
12/1	Mark Clear	1	Housing Diversity		TIF
12/1	Plan Commission	1	Housing Diversity		
12/2	Common Council	1	Housing Diversity		
12/3	Ed Clarke	1	TIF policy		
12/3	Ed Clarke	1	TIF policy		
12/3	Joe Gramacki	1	TIF policy		
12/3	Mario Mendra	1	TIF policy		
12/4	Solid West Advisory Com	1	Recycling		
12/4	Paul Skidmore	1	Housing Diversity		
12/9	Paul Skidmore	1	Housing TIF		
12/9	ThuyPham Randle	1	low income housing		
12/10	Judy Compton	1	Housing issues		
12/15	TIF ad hoc	1	TIF policy		
12/15	Brenda Kankeel	1	TIF policy		
12/15	Joe Gramacki	1	TIF policy		
12/15	Mark Clear	1	TIF policy		
12/22	ThuyPham Randle	1	low income housing		
12/24	Ed Clarke	1	TIF policy		

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**CITY OF MADISON  
Principal's Expense Statement**

**Reporting Period:** January 1 through June 30  
July 1 through December 31

**Filing Deadline, Indicate Half-Year:**  July 31  
 January 31

Name of Principal Smart Growth Greater Madison

Phone No. 608-663-2005

Address 701 e. Washington Ave Madison, 53703

Name of Lobbyist Carole Schaeffer

Lobbyist Phone No. 212-5869

Name of Lobbyist

Lobbyist Phone No.

Total lobbying expenditures and obligations did not exceed \$1,000. (If so, proceed directly to Certification.)

Total lobbying expenditures and obligations incurred exceeded \$1,000. \$ 6,094

Is this amount an estimate under Sec. 2.40 (10) (b) MGO? Yes  No

**Disclosure of Lobbying Communications**

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
1/4	Inclusionary zoning comm.	1	Inclusionary zoning	Carole Schaeffer
1/14	Sustainable Design energy comm.	1	LEED	"
1/16	Urban Design Com	1	Signage	"
1/17	Brad Murphy	1	Demolition standards	"

See Page 2 to List Additional Disclosures

**Certification**

I certify that the above is true and correct to the best of my knowledge, information and belief and that I am the registrant or authorized designee. I understand that if I know or believe any of the above information not to be true, I am subject to a forfeiture of \$1,000 or more.

Signature Carole Schaeffer Title executive director  
 Type or print name Carole Schaeffer  
 Date 7/31/08

Continuation of Disclosures

Name of Principal: SGGM

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
1/16	Brian Solomon	1	regionalism	Carole Schaeffer
1/16	Michael Schumacher	1	Parkland	-
1/18	IZ committee	1	IZ	-
1/23	Lauren Crane	1	Condo instrument review	-
1/30	Judy Compton	1	Condo instrument review	-
1/30	Michael Schumacher	1	Demolition standards	-
1/30	Joe Clausius	1	" "	-
1/30	Tim Gruber	1	" "	-
1/30	Lauren Crane	1	Condo instrument review	-
1/30	Joe Clausius	1	Parkland	-
1/30	Judy Compton	1	Demolition	-
1/31	Lauren Crane	1	IZ	-
2/1	Inclusionary Zoning Com	1	IZ	-
2/4	TIF Committee	1	TIF	-
2/5	Zach Beardon	1	TIF	-
2/11	Michael Schumacher	1	Parkland / TIF	-
2/11	Sustainable Design Com.	1	LEED cert.	-
2/11	Judy Compton	1	LEED cert.	-
2/11	Plan Commission	1	Demolition Standards	-
2/15	Lauren Crane	1	IZ	-
2/15	IZ committee	1	IZ	-
2/18	Joel Plant	1	IZ/TIF/LEED	-
2/20	Joe Clausius	1	Parkland	-

Continuation of Disclosures

Name of Principal: \_\_\_\_\_

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
2/20	Matt Mikalajewski	1	econ dev. plan	Carole Schaeffer
2/21	Judy Compton	1	econ. dev plan	
2/21	Paul Skidmore	1	Demolition Standards	
2/23	Paul Skidmore	1	" "	
1/14	Landmarks Comm	1	" "	
1/28	Landmarks Com	1	Demolition Standards	
2/26	Hickory Hurst	1	IZ	
2/26	Julia Kern	1	Demo Standards	
2/25	Plan Commission	1	Demo "	
2/29	Lauren Cress	1	IZ	
2/29	Brenda Kunkel	1	Demo. Standards	
2/29	IZ oversight	1	IZ	
3/5	Brad Murphy	1	Demo Standards	
3/5	Jim Boll	1	" "	
3/7	Ray Harman	1	IZ	
3/7	Ray Harman	1	Cap. Area Regional Plan Commission	
2/18	Joel Plant	1	general update	
2/18	Ray Harman	1	general update	
2/25	Matt Mikalajewski	1	econ dev plan	
2/25	Michael Schumacher	1	econ dev plan	
2/25	Joe Chrusius	1	Portland / TIF	
2/28	CARPC	1	CARPC	
3/14	IZ	1	IZ	

SGGM

Continuation of Disclosures

Name of Principal:

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
3/17	Tax Inc. Fin. Com.	1	TIF	Cordelia Schaeffer
3/17	Zach Brandon	1	TIF	
3/18	Common Council	1	Demolition	
3/18	Judy Compton	1	Demo	
3/18	Tim Gruber	1	Demo	
3/18	Brenda Konkel	1	Demo	
3/18	Michael Schumacher	1	Demo	
3/18	Joe Clausius	1	Demo	
3/18	Zach Brandon	1	Demo	
3/28	IZ comm.	1	IZ	
3/28	Zach Brandon	1	IZ/CARPC	
3/27	Ray Harmon	2	Demolition	
3/27	Joel Plant	1	Demo	
3/27	Mario Mendura	1	Demo	
3/31	Paul Skidmore	1	Demo/Portland	
4/4	Ray Harmon	1	Demo	
4/4	Joel Plant	1	Demo	
4/4	Mario Mendura	1	Demo	
4/4	Judy Compton	1	LEED cert	
4/4	Ol Martin	1	Signage	
4/4	Brenda Konkel	2	TIF	
4/11	IZ oversight	1	IZ	
4/15	Brenda Konkel	2	TIF	

Continuation of Disclosures

Name of Principal: SGGM

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
4/2	economic dev. com	1	e con. dev. plan	Carla Chawter
4/18	12 oversight	1	12	
4/18	Judy Compton	1	Staughton Rd	
4/25	12 comm	1	12	
4/25	Ray Hermon	1	12	
4/25	Satyra Rhodes-Conway	1	LEED building	
5/02	12 comm	1	12	
5/5	TIF comm	1	TIF	
5/5	Jed Sandborn	1	TIF	
4/8	Common Council	1	Demo	
4/8	Tim Gruber	2	Demo	
4/8	Michael Shumacher	1	Demo	
4/8	Laurie Crane	2	Demo	
4/8	Zach Borders	1	Demo	
4/8	Tim Brewer	1	Demo	
4/8	Brenda Kerkeel	1	Demo	
4/8	Thuy Phan Remmel	1	Demo	
4/8	Judy Compton	1	Demo	
4/8	Paul Skidmore	1	Demo	
5/1	Alex Solutes	1	12	
5/9	Alex Solutes	1	12	
5/9	Inclus. Zoning	1	12	
5/5	TIF comm	1	TIF	

Continuation of Disclosures

Name of Principal: \_\_\_\_\_

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
5/7	UDC	1	Signage	Candace Koster
5/7	Econ Dev Com	1	econ dev plan	
5/16	IZ com	1	IZ	
5/16	Olax Solutos	1	IZ	
5/19	TIF com	1	TIF	
5/2	Sally Rhodes-Conway	1	LEED building	
5/9	" "	1	" "	
5/14	" "	1	" "	
5/19	TIF com	1	TIF	
5/23	Joel Plant	1	Public Safety	
5/23	Judy Compton	1	Public Safety	
5/27	Judy Compton	1	Stoughton Road	
5/29	Tim Buer	1	IZ	
5/29	Joe Clausius	1	Parkland	
5/30	IZ com	1	IZ	
6/2	Jed Sandburn	1	TIF	
6/2	Ray Hermon	1	TIF	
6/2	Paul Skidmore	1	Parkland/TIF	
6/2	Joel Plant	1	Public Safety	
6/2	Michael Schumacher	1	TIF	
6/2	Joe Clausius	1	TIF	
6/2	Judy Compton	1	TIF	
6/2	Mark Clear	1	TIF	

Continuation of Disclosures

Name of Principal: JGGM

Date	City Official	Number of Contacts	Subject of Each Contact	Lobbyist
6/2	Brian Solomon	1	Sustainable Building	C. Schaefer
6/2	Jarry Palm	1	CARPC	
6/2	Boch Brandon	1	TIF	
6/3	Mark Clear	1	TIF	
6/3	Jed Jendern	1	TIF	
6/4	Mark Clear	1	TIF	
6/6	Jarry Palm	1	CARPC	
6/6	12 comm	1	12	
6/6	Roytman	1	CARPC/12	
6/9	Joe Clausius	2	12	
6/12	Joe Clausius	3	TIF	
6/6	Jatya Phoder-Camuy	1	Sustainable Building	
6/10	Jed Sandborn	1	TIF	
6/11	Mark Clear	1	TIF/LEED	
6/16	Boch Brandon	1	TIF	
6/16	TIF comm	1	TIF	
6/13	12 comm	1	12	
6/17	Joel Plant	1	Public Safety	
6/18	Michael Schumacher	1	TIF/12/Port	
6/20	12 oversight	1	12	
6/20	James Chase	1	12	
6/20	Joel Plant	1	12	
6/23	Jarry Palm	1	TIF/CARPC	





# REGISTRATION OF LOBBYIST

Return to Office of the City Clerk, 210 Martin Luther King, Jr. Blvd., Room 103, Madison, WI 53703-3342

## Section 1 -- Identification of Lobbyist "Lobbyist" means any person paid to influence administrative or legislative action.

Schaeffer Last Name      Carole First Name      executive director Title

701 e washington ave ste 107 Mailing Address

madison City      WI State      53575 Zip Code

Business Address (if different)

608-663-2005 Contact Phone

cschaeff@smartgrowthmadison.com Contact E-mail Address

Contact FAX

Internet Address

Person to whom correspondence should be sent (if different from above)

\_\_\_\_\_  
Last Name      First Name

\_\_\_\_\_  
Firm or Organization Name

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
City      State      Zip Code

\_\_\_\_\_  
Phone      FAX      E-mail Address

## Section II -- Nature and Interest of Principal

Smart Growth Madison, Inc.  
Name of Principal

Designated Representative of Principal:

Schaeffer Last Name      Carole First Name      executive director Title

701 e washington ave ste 107 Mailing Address

madison City      WI State      53575 Zip Code

Business Address (if different)

608-663-2005 Contact Phone

cschaeff@smartgrowthmadison.com Contact E-mail Address

Contact FAX

www.smartgrowthmadison.com Internet Address

Check one of the following and complete only that section:

Business Entity

Describe the business activity in which the entity is engaged

Chief Executive Officer: \_\_\_\_\_  
Last First Title

If partnership or limited liability company, check here  and attach list of partners/members.

Industry, Trade or Professional Association

Dane County real estate developers and those associated professions affected by the  
Describe the industry, trade or profession including any segment thereof which the association exclusively or primarily represents development industry.

Chief Executive Officer: Schaefer Carde executive director  
Last First Title

Approximate number of members: 30

Other Not for Profit

Labor Union  Charitable/Religious/Civic, etc.  Other

Briefly describe the organization's purpose and any other group with a common interest which the organization primarily represents

Describe any industry, trade, profession, or group with a common interest which the organization primarily represents or from which the organization's membership or financial support is primarily derived

Approximate number of members: \_\_\_\_\_

Individual

Name and address of the individual's employer, if any, or of the individual's primary place of business, if self-employed

Describe the business activity in which the individual or the individual's employer is engaged

**Section III -- Areas of Lobbying**

Provide a reasonably specific narrative summary of areas of legislative and administrative action the principal may attempt to influence:

City policies that may impact new and or/ existing  
development.

List the City agencies in which the principal seek to influence administration action:

- All
- None
- Agencies listed below

Identify the proposed legislative or administrative action in connection with which the principal has made or intends to make a lobbying communication before December 31.

1 Item: TIF, impact fees, LEED certification, demolition standards, economic development, zoning changes, inclusionary zoning

a. How will this item affect the principal's business or other activity?

They affect costs, directly and indirectly, and ability to do projects in Madison by adding or modifying changes in the approval process

b. Which industry, trade, profession or segment or portion thereof would be principally affected?

Developers and builders

c. If the item is an appropriation, please identify the City program or person for which the appropriation is proposed and the approximate amount, if you know the amount.

For additional items, attach additional sheets.

2. If lobbying communication relates to the capital or operating budget, identify topic or topics.

**CAPITAL BUDGET**

**OPERATING BUDGET**

topic
topic
topic
topic
topic
topic

topic
topic
topic
topic
topic
topic

**Section IV - Authorization of Lobbyists**

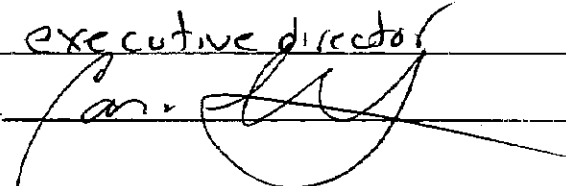
As a designated representative of the Principal, the Lobbyist named above is hereby authorized to lobby on behalf of the Principal.

- The lobbyist is an employee of the Principal.
- The lobbyist is also authorized to file expense reports or other filings on behalf of the Principal.

Dated: 1-8-08

Name: Carole Schaeffer

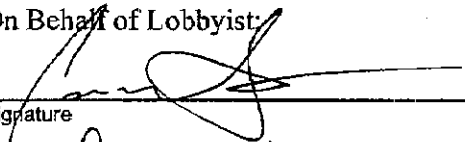
Position: executive director

Signature: 

**Section V -- Certification**

I certify that the above is true and correct to the best of my knowledge, information and belief, and that I am the registrant or an authorized designee. I understand that I am subject to a forfeiture if I know or believe any of the above information not to be true.

On Behalf of Lobbyist:

 executive director

Signature Title

Carole Schaeffer 1-8-08

Type or print name as signed above Date

Address & Telephone (if different from first page of this form)

On Behalf of Principal:

see above

Signature Title

Type or print name as signed above Date

Address & Telephone (if different from first page of this form)