



City of Fort Atkinson
City Manager's Office
101 N. Main Street
Fort Atkinson, WI 53538

**CITY COUNCIL MEETING
IN PERSON AND VIA ZOOM
TUESDAY, DECEMBER 17, 2024 – 7:00 PM
CITY HALL – SECOND FLOOR**

<https://us02web.zoom.us/j/86483953124?pwd=Nd8wSXu2lT3DtD9oWOTwibQWQglO0w.1>

Meeting ID: 864 8395 3124

Passcode: 53538

Dial by Location

+1 312 626 6799

If you have special needs or circumstances which may make communication or accessibility difficult at the meeting, please call (920) 397-9901. Accommodations will, to the fullest extent possible, be made available on request by a person with a disability.

AGENDA

- 1. Call meeting to order**
- 2. Roll call**
- 3. Public Hearings**
 - a. Public Hearing relating the **petition to discontinue Trillium Drive** in the City of Fort Atkinson, Jefferson County, Wisconsin
- 4. Public Comment:** *The City Council will receive comments from City residents. Comments are generally limited to three minutes per individual. Anyone wishing to speak is required to sign up in advance or state the following items for the record when called upon: name, address, subject matter, and contact information. No action will be taken on any public comments unless the item is also elsewhere on the agenda.*
- 5. Consent Agenda:** *The Consent Agenda outlined below is hereby presented for action by the City Council. Items may be removed from the Consent Agenda on the request of any one Council member. Items not removed may be adopted by one action without debate. Removed items may be taken up either immediately after the Consent Agenda or placed later on the agenda at the discretion of the Council President.*

- a. Review and possible action relating to the **minutes of the December 3, 2024 City Council meeting** (Ebbert, Clerk/Treasurer/Finance Director)
- b. Review and possible action relating to the **minutes of the December 10, 2024 Plan Commission meeting** (Ebbert, Clerk/Treasurer/Finance Director)
- c. Review and possible action relating to the **minutes of the December 11, 2024 Economic Development Commission meeting** (Ebbert/Clerk/Treasurer/Finance Director)
- d. Review and possible action relating to the **minutes of the December 12, 2024 Transportation and Traffic Review Commission meeting** (Ebbert/Clerk/Treasurer/Finance Director)
- e. Review and possible action relating to **building, plumbing, and electrical permit report for November 2024** (Draeger, Building Inspector/Zoning Administrator)
- f. Review and possible action relating to the City Clerk-issued **License and Permit Report for November 2024** (Ebbert, Clerk/Treasurer/Finance Director)
- g. Review and possible action relating to **City Sewer, Water, and Stormwater Utility Financial Statements** as of November 30, 2024 (Ebbert, Clerk/Treasurer/Finance Director)

6. Petitions, Requests, and Communications

7. Resolutions and Ordinances

- a. Review and possible action on a resolution to **Discontinue Trillium Drive** in the City of Fort Atkinson (Selle, Director of Public Works)
- b. Review and possible action relating to a Resolution **Defederalizing American Rescue Plan Act (ARPA)** funds in the City of Fort Atkinson, Jefferson County, Wisconsin (Houseman, City Manager)
- c. Review and possible action relating to a Resolution **amending the 2024 Annual City of Fort Atkinson Budget** relating to a transfer of funds between Tax Increment Districts (Houseman, City Manager)
- d. Second and possible third/final reading of an ordinance relating to a **Zoning Map Amendment** to change the zoning district for the property located at 211 Memorial Drive (parcel number 226-0514-0312-050), from Single Family Residential (SR-5) to Institutional (I) (ZMA-2024-02) (Draeger, Building Inspector/Zoning Administrator)

8. Reports of Officers, Boards, and Committees

- a. City Manager's Report (Houseman, City Manager)

9. Unfinished Business

- a. Review and possible action relating to a Development Agreement between the City of Fort Atkinson and Intrepid Investments for the **Ridge View Estates Subdivision**

(Houseman, City Manager)

- b. Review and possible action relating to proposals for **recruitment services for the Public Works Director** position (Houseman, City Manager)

10. New Business

- a. Review and possible action relating to the **repair of the 2020 Dodge Grand Caravan for the Taxi Program** at a cost of \$22,476.78 from Shepy's Autobody with a 10% contingency (Selle, Director of Public Works)
- b. Review and possible action to authorize the City Manager to execute the **2025 Joint Powers Agreement** with Jefferson County for the County 911 Emergency System (Houseman, City Manager)
- c. Review and possible action relating to an Amendment to the Agreement for **Solid Waste and Recyclable Collection and Disposal** between the City of Fort Atkinson and GFL Solid Waste Midwest, LLC (Houseman, City Manager)
- d. Review and possible action relating to an **Agreement between the City of Fort Atkinson and the Fort Atkinson Firefighters - Local 580** for 2025 (Peterson, Fire Chief)
- e. Review and possible action relating to Police Department **equipment and upfitting order for 2025 squad car purchase** (Bump, Police Chief)
- f. Review and possible action on **seven construction package contracts for the Haumerson's Pond Garage/Shelter** in an amount not to exceed \$292,939.66 (Dayton, Director of Parks and Recreation)
- g. Review and possible action relating to 2025 Capital Outlay **Purchase of a 2025 F150 Truck including Tommy Gate Liftgate and Safety Light** for the Parks and Recreation Department (Dayton, Parks and Recreation Director)
- h. Review and possible action relating to the purchase of **Furniture and Fixtures for the Public Works and Parks Operations Facility Project** (Williamson, Superintendent Public Works)
- i. Review and possible action relating to the purchase of **service shop equipment for the new Public Works and Parks Operations Facility** (Williamson, Superintendent Public Works)
- j. Review and possible action relating to a **contract for Fiber Optic Cable and Splicing Installation Services from Koch Telecommunications** at a cost not to exceed \$9,011.32 (Williamson, Superintendent Public Works)
- k. Review and possible action authorizing an **Environment and Planning Study** to support the airport lighting and navigation upgrades from Mead and Hunt in an amount not to exceed \$20,000 (Selle, Director of Public Works)

11. Miscellaneous

12. Claims, Appropriations and Contract Payments

- a. Review and possible action relating to the **Verified Claims** presented by the Director of Finance and authorization of payment (Ebbert, Clerk/Treasurer/Finance Director)

13. Adjournment

Date Posted: December 13, 2024

CC: City Council; City Staff; City Attorney; News Media; Fort Atkinson School District; Fort Atkinson Chamber of Commerce

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MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Andy Selle, Director of Public Works

RE: Public Hearing relating the petition to discontinue Trillium Drive in the City of Fort Atkinson, Jefferson County, Wisconsin

BACKGROUND

Trillium Dr was platted in early 2024 using a Certified Survey Map, approved by Planning Commission and City Council. The boundaries of the right of way reflected a previous design for the development that is no longer appropriate. The right of way will be re-established in functionally the same area by the review (and expected) approval of a preliminary plat for all of the roads in the planned subdivision west of Banker Road.

The process for discontinuance of a right of way is covered in state statute 66.1003. The statute indicates that proceedings to consider the discontinuance may be initiated by a petition for such by all adjacent adjoining property owners.

DISCUSSION

State statutes govern the discontinuance of the right of way, as Council may recall from recent requests for Jamesway and N. 4th St. This process will be simpler, since the City owns the land abutting the right of way, but will follow the process outlined in the statute. A class 3 notice will be published, and this petition will come before the Council at their meeting on December 17 as a resolution for approval.

The Plan Commission reviewed the request at a meeting on December 10, 2024 and recommended the City Council approve the Resolution to discontinue Trillium Drive.

FINANCIAL ANALYSIS

There is no financial impact as a result of the passage of this resolution.

RECOMMENDATION

At this time, Staff recommends that the City Council hold a public hearing on the petition to discontinue Trillium Drive.

There is an action item later on the agenda relating to this matter. At that time, staff will recommend that the City Council approve the resolution to discontinue Trillium Drive in the City of Fort Atkinson.

ATTACHMENTS

1. Public Notice and Exhibit A

**NOTICE OF MEETING ON DISCONTINUANCE
OF TRILLIUM DRIVE
CITY OF FORT ATKINSON, JEFFERSON COUNTY, WISCONSIN**

PLEASE TAKE NOTICE, the City Council of the City of Fort Atkinson will act upon a petition to discontinue a portion of Trillium Drive, (and the making of a related amendment to any official City map) as shown and described on the map and description attached hereto and incorporated herein on December 17, 2024 at 7:00 pm, 101 N. Main St., Fort Atkinson, WI.

Dated: 11/18/24

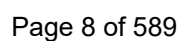
CITY OF FORT ATKINSON
Jefferson County, Wisconsin
Michelle Ebbert, City Clerk

Attachments: Plat of Proposed Vacation and Legal Description

Notice to publisher: Publish as a Class 3 Notice on November 26, 2024, December 3, 2024 and December 10, 2024.

(Do not publish this note)

LOCATED IN THE SOUTHWEST QUARTER OF THE NORTHWEST
QUARTER, SECTION 33, TOWNSHIP 6 NORTH, RANGE 14 EAST, CITY
OF FORT ATKINSON, JEFFERSON COUNTY, WISCONSIN.



CERTIFIED SURVEY MAP NO. _____
VOLUME _____, PAGE _____.

LOCATED IN THE SOUTHWEST QUARTER OF THE NORTHWEST
QUARTER, SECTION 33, TOWNSHIP 6 NORTH, RANGE 14 EAST, CITY
OF FORT ATKINSON, JEFFERSON COUNTY, WISCONSIN.

SURVEYOR'S CERTIFICATE

I, Dustin J. LaBlonde, Wisconsin Professional Land Surveyor, hereby certify that I have surveyed, divided, and mapped part of the Southwest quarter of the Northwest quarter, Section 33, Township 6 North, Range 14 East, City of Fort Atkinson, Jefferson County, Wisconsin, more particularly described as follows:

Commencing at the West quarter corner of said Section 33;
Thence N00°50'52"W 659.30 feet along the West line of the Northwest quarter of said Section 33 to the point of beginning;
Thence N00°50'52"W 683.18 feet along said West line;
Thence Southeasterly 38.13 feet along the arc of a 25.00 foot radius curve concave Northeasterly whose chord bears S44°32'11"E 34.54 feet to the North line of said Southwest quarter of the Northwest quarter;
Thence S88°13'31"E 703.49 feet along said North line;
Thence Southerly 228.00 feet along the arc of a 358.00 foot radius curve concave Easterly whose chord bears S02°14'19"E 224.17 feet;
Thence Southerly 193.84 feet along the arc of a 265.00 foot radius curve concave Westerly whose chord bears S00°28'17"W 189.55 feet;
Thence S21°25'36"W 261.45 feet to the South line of the North half of said Southwest quarter of the Northwest quarter;
Thence N88°09'29"W 629.27 feet along said South line to the point of beginning.

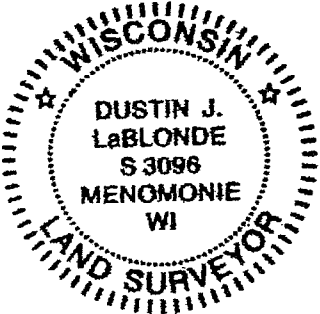
Said parcel contains 468,160 square feet (10.75 acres) more or less.

Said survey is subject to easements of record and as shown.

That I have made such survey, land division, and map at the direction of the City of Fort Atkinson, owner, 101 N. Main Street, Fort Atkinson, Wisconsin 53538. That such map is a correct representation of the exterior boundaries of the land surveyed, and the subdivision thereof made. That I fully complied with the provisions of Chapter 236.34 of the Wisconsin State Statutes, A-E 7 of the Wisconsin Administrative Code and the subdivision regulations of the City of Fort Atkinson in surveying, dividing and mapping the same.

Dated this 27th day of June, 2023.


Dustin J LaBlonde, P.L.S. #3096



Line Table		
Line #	Direction	Length
L1	N00°50'52"W	82.57'
L2	N05°06'39"E	35.02'
L3	N00°30'12"E	66.16'
L4	N17°30'13"E	55.09'
L5	N33°07'35"E	39.87'
L6	S83°22'28"E	42.64'
L7	S77°02'37"E	91.41'

Line Table		
Line #	Direction	Length
L8	S35°18'12"E	48.83'
L9	S33°39'53"E	56.61'
L10	S05°04'39"W	43.59'
L11	S08°18'22"E	61.12'
L12	S14°38'43"E	43.37'
L13	S04°30'25"E	19.38'

Curve Table							
Curve #	Length	Radius	Delta	Chord Bearing	Chord Length	1st Tangent	2nd Tangent
C1	38.13'	25.00'	87°22'39"	S44°32'11"E	34.54'	S00°50'52"E	S88°13'31"E
C2	228.00'	358.00'	36°29'27"	S02°14'19"E	224.17'	S16°00'24"W	S20°29'02"E
C3	154.09'	438.00'	20°09'23"	S10°24'21"E	153.29'	S00°19'40"E	S20°29'02"E
C4	193.84'	265.00'	41°54'39"	S00°28'17"W	189.55'	S20°29'02"E	S21°25'36"W
C5	135.32'	185.00'	41°54'39"	S00°28'17"W	132.33'	S20°29'02"E	S21°25'36"W
C6	38.38'	25.00'	87°58'17"	S44°18'48"E	34.72'	S88°17'56"E	S00°19'40"E
C7	40.41'	25.00'	92°37'21"	N45°27'49"E	36.16'	N00°50'52"W	S88°13'31"E

Dustin J. LaBlonde, PLS
Cedar Corporation
604 Wilson Avenue
Menomonie, Wisconsin 54751

CERTIFIED SURVEY MAP NO. _____
VOLUME _____, PAGE _____.

LOCATED IN THE SOUTHWEST QUARTER OF THE NORTHWEST
QUARTER, SECTION 33, TOWNSHIP 6 NORTH, RANGE 14 EAST, CITY
OF FORT ATKINSON, JEFFERSON COUNTY, WISCONSIN.

CORPORATE OWNER'S CERTIFICATE OF DEDICATION

The City of Fort Atkinson, a municipal corporation duly organized and existing under and by virtue of the laws of the State of Wisconsin, as owner, does hereby certify that said corporation caused the land described on this Certified Survey Map to be surveyed, divided, mapped and dedicated as represented on this Certified Survey Map and does further certify that this Certified Survey Map is required by s.236.10 or s.236.12 to be submitted to the following for approval or objection:

The City of Fort Atkinson

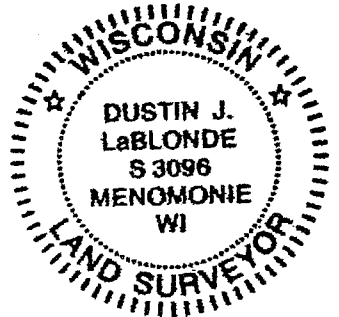
IN WITNESS WHEREOF, said City of Fort Atkinson has caused these presents to be signed by Rebecca LeMire, its City Manager, and countersigned by Michelle Ebbert, its City Clerk, at Fort Atkinson, Wisconsin, and its Corporate Seal to be hereto affixed on this

12 day of February, 2023.

In presence of:

Rebecca LeMire City Manager

Michelle Ebbert City Clerk



Dustin J. LaBlonde
06/27/2023

STATE OF WISCONSIN)
Jefferson COUNTY) SS

Personally came before me this 12th day of February, 2023, Rebecca LeMire, City Manager, and Michelle Ebbert, City Clerk of the above named corporation, to me known to be the persons who executed the foregoing instrument, and to me known to be such City Manager and City Clerk of said corporation, and acknowledged that they executed the foregoing instrument as such officers as the deed of said corporation, by its authority.

Notary Seal
My commission expires 10/11/25

Notary Public, Fort Atkinson Wisconsin.

CERTIFICATE OF CITY OF CITY OF FORT ATKINSON

This Certified Survey Map is approved of as complying with the Subdivision Ordinance, of the Municipal Code of the City of Fort Atkinson.

Dated this 12 day of Feb, 2023.

Rebecca LeMire City Manager

Michelle Ebbert City Clerk



**CITY COUNCIL MEETING
IN PERSON AND VIA ZOOM
TUESDAY, DECEMBER 3, 2024 – 7:00 PM
CITY HALL – SECOND FLOOR**

MINUTES

1. Call meeting to order

President Lescohier called the meeting to order at 7:00 pm.

2. Roll call

Present: Cm. Becker, Jaeckel, Johnson, Schultz and President Lescohier. Also present: City Manager, City Attorney, City Clerk/Treasurer, Director of Public Works, Building Inspector, Police Chief, Fire Chief and Park & Recreation Director.

3. Public Hearings

None.

4. Public Comment

None.

5. Consent Agenda

Cm. Schultz moved, seconded by Cm. Johnson to approve the Consent Agenda as presented with a minor correction to the Council Minutes of the November 19, 2024 meeting. Motion carried.

- a. Review and possible action relating to the **minutes of the November 19, 2024 City Council meeting** (Ebbert, Clerk/Treasurer/Finance Director)*
- b. Review and possible action relating to the **minutes of the November 26, 2024 Plan Commission meeting** (Ebbert, Clerk/Treasurer/Finance Director)*
- c. Review and possible action relating to the **minutes of the November 20, 2024 Police and Fire Commission meeting** (Clerk/Treasurer/Finance Director)*

6. Petitions, Requests, and Communications

None.

7. Resolutions and Ordinances

- a. *First reading of an ordinance relating to a **Zoning Map Amendment** to change the zoning district for the property located at 211 Memorial Drive (parcel number 226-0514-0312-050), from Single Family Residential (SR-5) to Institutional (I) (ZMA-2024-02) (Draeger, Building Inspector/Zoning Administrator)*

Building Inspector Draeger discussed the proposed rezoning that includes one parcel located at the corner of Sherman Avenue and Memorial Drive. The 0.68-acre property is currently developed with an 8,000 square foot, single-story, commercial-style building with the remainder of the site devoted to surface parking. This was the former location of the Fort Family Dental Clinic prior to that use moving out to Madison Avenue. The applicant is proposing to rezone the property to Institutional to enable the current and future use of the property. This is consistent with how the property has been developed, is currently oriented, and was used when it was a dental practice just a few years ago. The proposed rezoning aims to provide additional land use opportunities for the property that mirrors the neighborhood characteristics of intermixed Institutionally-zoned properties throughout this area and the existing development patterns of the site. Overall, the proposed rezoning meets the requirements of the City's ordinances, is in alignment with adopted City plans, and can provide activation of an existing vacant building and site. A Public Hearing was held at the Plan Commission meeting on November 26, 2024. Also, at that meeting, the Plan Commission recommended the City Council perform three readings and adopt the ordinance, amending the Official Zoning Map.

Cm. Becker moved, seconded by Cm. Johnson to approve the first reading of the ordinance, amending the Official Zoning map for the property located at 211 Memorial Drive from (SR-5) Single Family to (I) Institutional, and direct the City Manager to prepare it for a second and possible third/final reading on December 17th. Motion carried.

- b. *Review and possible action relating to a **Resolution Adopting the 2025 Stormwater Utility Rate** (Selle, City Engineer/Director of Public Works)*

Director Selle referenced the presentation on November 19th from Trilogy Inc., who aids in evaluating the current financial picture of the City's three utilities as well as look at forecasting future expenses and revenues. During the 2025 budget process that Council has reviewed over several recent meetings and workshops, the need for an increase in utility rates to meet anticipated expenses was noted. Past rates and revenues: Increased by 25% in 2024, to \$65.63/ERU/Year. Rate increases are needed to fund: Debt service for Public Works and Parks Facility, Ongoing maintenance and infrastructure replacement of the collection system, Re-establish depleted reserves and TMDL projects.

Cm. Becker moved, seconded by Schultz to adopt the Resolution authorizing the 2025 Stormwater Utility Rate. Motion carried.

- c. *Review and possible action relating to a **Resolution Adopting the 2024 Wastewater Utility Rates** (Selle, City Engineer/Director of Public Works)*

Director Selle provided the recommended increase for wastewater rates. The last full rate study was completed in 2020 with an increase of 6% that was implemented in 2021, 2022,

and 2023. Rates were increased 3% in 2024 and now recommended 3% for 2025.

Cm. Johnson moved, seconded by Cm. Johnson to adopt the Resolution authorizing the 2025 Wastewater Utility Rates. Motion carried.

8. Reports of Officers, Boards, and Committees

- a. *City Manager's Report (Houseman, City Manager)*
No action was taken.

9. Unfinished Business

None.

10. New Business

- a. *Review and possible action relating to a **Public Monument Review - Eagle Scout Project to install bike repair stand** located at the Rotary Train Depot (Dayton, Director of Parks and Recreation)*

Park & Recreation Director Dayton introduced Scout Landon Stachel as he is requesting to install an outdoor bike repair station for his final Eagle Scout Project. At the September 11, 2024 Park and Recreation Advisory Board meeting, Landon presented his project and received feedback regarding the installation location along the Glacial River Bike Trail. Board members and staff recommended the site north of the Rotary Train Depot shelter, near the existing bike racks. Staff presented the monument to the Plan Commission at the November 26, 2024, meeting the requirements of the Public Monument/Building Review application. The Plan Commission reviewed this item and recommended that the City Council approve the bike repair station through this process. Staff will continue to work with the applicant to bring this project to completion.

Cm. Jaeckel moved, seconded by Cm. Schultz to approve this request for a Public Monument/Building review allowing the installation of the Bike Repair Station along the Glacial River Trail adjacent to the Rotary Train Depot shelter. Motion carried.

- b. *Review and possible action relating to a contract for **Construction Engineering Services** from Quam Engineering (Selle, Director of Public Works)*

Director Selle reminded the Council of the Banker Rd development project design that was awarded to Quam Engineering for \$95,985, nearly \$100,000 below the next lowest design bid. The City then was awarded a \$1.4M grant for Banker Road specifically, and thus shifted the design scope with Quam Engineering away from Banker Road and instead added two additional streets and a full grading plan for the lots that we have called Phase 1. The added costs associated with that change in the design were captured in an Addendum for \$107,335, that staff mistakenly presented to the Council as a contract addendum to design Banker Road under the WisDOT grant award. So to summarize, our

total design contract for the infrastructure and roads in Phase 1 with Quam Engineering is \$203,320, of which we have about \$18,000 remaining. Our current design effort is completed, except for some interactions with WE Energies. A contract was awarded by Council at their meeting on 11/19/24 for the construction of the infrastructure by Forest Landscaping and Construction, which has already commenced. The design contract with Quam Engineering took us through the bidding phase, completed on October 24, 2024. As with past practice, the City has asked for a proposal from the design engineer, Quam Engineering, to provide construction period services which is before the Council tonight for consideration.

Cm. Jaeckel moved, seconded by Cm. Becker to approve the contract for Construction Engineering Services for the Banker Road infrastructure project from Quam Engineering in an amount not to exceed \$178,000. Motion carried.

- c. *Review and possible action relating to an Amendment to the Rural Fire Contract and Rural Ambulance Agreement between the City of Fort Atkinson and the Town of Oakland to **expand Fire/EMS services** (Peterson, Fire Chief)*

Chief Peterson provided that the Fort Atkinson Fire Department (FAFD) currently serves the City of Fort Atkinson and portions of five surrounding towns: Koshkonong, Hebron, Jefferson, Oakland, and Sumner. In the Town of Oakland, the Department currently serves sections 14 (portion), 23, 24, 25, 26, 27 (portion), 34, 35, and 36. Other sections and portions thereof of the Town of Oakland have been served by Jefferson, Lake Mills, and Cambridge. The Town of Oakland recently took action to remove the Town from the contracts with Cambridge EMS and the Cambridge Fire Department. This decision left the Town of Oakland without emergency service coverage effective January 1, 2025. Officials from the Town of Oakland have asked the Fort Atkinson Fire Department, as well as Jefferson and Lake Mills, to expand coverage areas further into Oakland to provide public safety services to residents. FAFD agreed to potentially extend coverage to these areas with Council approval, coordinated through discussions between Chief Peterson of Fort Atkinson, Chief Wegner of the Jefferson Fire Department, and Chief Russ of the Lake Mills Fire Department. This collective approach was designed to address the need based on each department's response capabilities and proximity to the affected areas. The cost for service in 2025 is not yet known, but per the current contract, it will be between 2% and 6% over the 2024 contract cost, subject to the CPI calculation. The 2024 cost for fire service is \$32,015.49. The Amendment outlines the cost for one year of Fire and EMS service for the additional portion of the Town of Oakland. The cost for fire service in 2025 for this additional area will be \$23,500 for fire protection and \$8,750 for fire equipment for a total of \$32,250. The cost for EMS service will be \$42.00 per capita for approximately 680 additional people, for a total of \$28,560. The City will invoice the Town of Oakland quarterly in 2025 for both service areas.

Cm. Schultz moved, seconded by Cm. Jaeckel to approve the Amendment to the rural fire contract and rural ambulance contract between the City of Fort Atkinson and the Town of Oakland for 2025. Motion carried.

- d. *Review and possible action relating to the purchase of **Electronic Control Devices** under the Police Department 2025 CIP (Bump, Police Chief)*

Chief Bump shared that the police department is set to purchase new electronic control devices (ECDs, also known as tasers) from Axon to replace the current units that have exceeded end of life estimates. The replacement of the ECDs was planned and budgeted under the 2025 Capital Outlay Budget for the Police Department in the amount of \$15,000.00. This total quote will cover purchase and deployment of the replacement ECDs. The replacement of the ECDs are on a 5 year rotation within the Capital Improvement Budget. There are no competitive or comparison quotes. Axon is the sole proprietor for their products and there are no authorized dealers or secondary sale options/vendors. Ordering in December 2024 will lock in the 2024 prices with delivery and payment in 2025.

Cm. Becker moved, seconded by Cm. Jaeckel to authorize staff to purchase replacement electronic control devices from Axon for \$14,985.80 as budgeted in the Police Department 2025 CIP. Motion carried.

- e. *Review and possible action relating to the **purchase of two squad cars** under the Police Department 2025 CIP (Bump, Police Chief)*

Chief Bump noted the department is set to replace two (2) police vehicles in 2025. Funds are established in the 2025 Budget under the Police Outlay Account in the amount of \$138,000.00, which includes the vehicles and the equipment and change-over costs. The Police Department requested bids for the 2025 Ford Interceptor SUV. Through the bid process, staff received proposals from Ewald Ford and Griffin Ford. After the purchase of the vehicles, there will be roughly \$47,000 in costs associated with squad specific equipment and change over costs. When those costs have been determined, staff will bring the purchases back to the City Council for approval. The vehicles will arrive in or around March 2025.

Cm. Schultz moved, seconded by Cm. Jaeckel to authorize the purchase of two new police squad cars from Griffin Ford for \$90,989.52 as budgeted in the 2025 Police Department CIP. Motion carried.

- f. *Review and possible action relating to a **Contract for City Engineer services** with Ruekert & Mielke, Inc. (Houseman, City Manager)*

Manager Houseman stated that with the departure of Public Works Director Andy Selle, who also served as the City Engineer, the City will be in need of the services of a licensed Professional Engineer. In 2022, the City entered into a Master Services Agreement with Ruekert & Mielke for municipal engineering services. The City Engineer position remains vacant, and the City has a well-established relationship with Andy Burt of Ruekert & Mielke. Staff wishes to continue this relationship through the attached Professional Services Agreement for interim City Engineer services.

Cm. Schultz moved, seconded by Cm. Johnson to approve the contract for interim City Engineering services with Ruekert & Mielke and authorize the City Manager to execute on

behalf of the City. Motion carried.

11. Claims, Appropriations and Contract Payments

- a. Review and possible action relating to the **Verified Claims** presented by the Director of Finance and authorization of payment (Ebbert, Clerk/Treasurer/Finance Director)*
Cm. Schultz moved, seconded by Cm. Becker to approve the list of Verified Claims as presented. Motion carried.

12. Closed Session

- a. The City Council may consider a motion to convene in closed session pursuant to State Stat. Section 19.85(1)(e) to conduct other specified business where competitive or bargaining reasons require a closed session [**Review of Draft Development Agreement for Ridge View Estates**] (Houseman, City Manager)*
Cm. Becker moved, seconded by Cm. Johnson to convene into closed session pursuant to State Statute 19,85(1)(e) to conduct other specific business where competitive or bargaining reasons require a closed session - review of draft development agreement for Ridge View Estates. Motion carried unanimously.

13. Adjournment

Cm. Jaeckel moved, seconded by Cm. Becker to adjourn. Meeting adjourned at 9:01 pm.

Respectfully submitted,
Michelle Ebbert
City Clerk/Treasurer/Finance Director



**PLAN COMMISSION MEETING
IN PERSON AND VIA ZOOM
TUESDAY, DECEMBER 10, 2024 – 4:00 PM
CITY HALL – SECOND FLOOR**

MINUTES

1. Call meeting to order

Chairperson Manager Houseman called the meeting to order at 4:00 pm.

2. Roll call

Present: Commissioners Kessenich, Shull, Council Rep Schultz, Chairperson Manager Houseman and Director Selle. Also present: City Attorney, Clerk/Treasurer/Finance Director and Building Inspector.

Absent: Highfield and Hough.

3. New Business

*a. Review and possible action relating to the **minutes of the November 26, 2024 Plan Commission meeting** (Ebbert, Clerk/Treasurer/Finance Director)*

Shull moved, seconded by Selle to approve the minutes of the November 26, 2024 Plan Commission meeting. Motion carried.

*b. Review and possible action relating to a **Site Plan Review** for signage at St Croix Hospice, 825 Lexington Blvd. (SPR-2024-10) (Draeger, Building/Zoning Administrator)*

Inspector Draeger presented the request from St. Croix Hospice to install new signs at their location 825 Lexington Blvd. The signs will be located on the West and South facades of the building, One facing Madison Avenue and one facing the West parking area, as well as a tenant panel sign in the Group Development sign along the North side of Madison Ave in front of the building located at Lexington Blvd.

Kessenich moved, seconded by Selle to approve the Site Plan Review for signage at St Croix Hospice at 825 Lexington Blvd. Motion carried.

c. Review and possible recommendation to the City Council on a petition to discontinue Trillium Drive in the City of Fort Atkinson (Selle, Director of Public Works)

Director Selle discussed that Trillium Dr was platted in early 2024 using a Certified Survey Map, approved by Planning Commission and City Council. The boundaries of the right of way reflected a previous design for the development that is no longer appropriate. The right of way will be re-established in functionally the same area by the review (and

expected) approval of a preliminary plat for all of the roads in the planned subdivision west of Banker Road. The proposed discontinuance of a public right-of-way requires a Class 3 Public Notice and notification of property owners immediately adjacent to the discontinued right-of-way. The notice will be published in the Jefferson County Daily Union on November 26, 2024, December 3, 2024 and December 10, 2024. The matter will be considered by the City Council at a meeting on December 17, 2024.

Schultz moved, seconded by Selle to recommend the City Council approve the resolution to discontinue Trillium Drive in the City of Fort Atkinson. Motion carried.

- d. *Update on previous Plan Commission approved projects (Houseman/Selle)*
Kessenich asked on the proposed 'pocket neighborhood' on South Main Street. Selle stated the site is vacant and the developers are working on the design including stormwater improvements.

No action was taken.

4. Adjournment

Selle moved, seconded by Kessenich. Meeting adjourned at 4:17 pm.

Respectfully submitted
Michelle Ebbert
City Clerk/Treasurer/Finance Director



**ECONOMIC DEVELOPMENT COMMISSION MEETING
IN PERSON AND VIA ZOOM
WEDNESDAY, DECEMBER 11, 2024 – 9:00 AM
CITY HALL – SECOND FLOOR**

MINUTES

1. Call meeting to order

Vice Chairperson McGlynn called the meeting to order at 9:00 am.

2. Roll call

Present: Wyatt Cooper, Jonah Ralston, Mary Kay Paulson Weston, Mark McGlynn, Council Representative Bruce Johnson, City Manager Rebecca Houseman, Chamber Director Shauna Wessley. Also present: City Clerk/Treasurer/Finance Director.

Absent: James Nelson and John Donohue

3. Approval of Minutes

*a. Review and possible action relating to the **minutes of the October 31, 2024 Economic Development Commission** (Ebbert/Clerk/Treasurer/Finance Director)*

Paulson Weston moved, seconded by Johnson to approve the minutes of the October 31, 2024 Economic Development Commission. Motion carried.

4. New Business

None.

5. Closed Session

a. The Economic Development Commission may adjourn into closed session under Wis. Stat. 19.85(1)(e) to conduct other specified business where competitive or bargaining purposes require a closed session [Review of Development Agreement for Ridge View Estates] (Houseman, City Manager)

Paulson Weston moved, seconded by Ralston to move into closed session under Wis. Stat. 19.85(1)(e) to conduct other specified business where competitive or bargaining purposes require a closed session [Review of Development Agreement for Ridge View Estates]. Motion carried unanimously.

6. Return to Open Session

- a. *The Economic Development Commission may return to open session and may make a recommendation to the City Council relating to the Development Agreement between the City of Fort Atkinson and Intrepid Investments for the development the Ridge View Estates (Houseman, City Manager)*

Ralston moved, seconded by Paulson Weston to return to open session. Motion carried unanimously.

Ralston moved, seconded by Paulson Weston to recommend the City Council approve the Development Agreement between the City of Fort Atkinson and Intrepid Investments for the development the Ridge View Estates subject to final legal review. Motion carried unanimously.

7. Adjournment

Paulson Weston moved to adjourn, seconded by Cooper. Meeting adjourned at 9:49 am.

Respectfully submitted,
Michelle Ebbert
City Clerk/Treasurer/Finance Director



**TRANSPORTATION & TRAFFIC REVIEW COMMITTEE MEETING
IN PERSON AND VIA ZOOM
THURSDAY, DECEMBER 12, 2024 – 2:00 PM
CITY HALL – SECOND FLOOR**

MINUTES

1. Call meeting to order

Chairperson Selle called the meeting to order at 2:01 p.m.

2. Roll call

Members Present: Armstrong, Selle, Bump, Jaeckel, Maas, Moehling, and Williamson arrived at 2:09 p.m.

Members Absent: Rice

3. Approval of Minutes

*a. Review and possible action relating to the **minutes of the November 13, 2023 Transportation and Traffic Review Committee***

Motion to approve the minutes of the November 13, 2023 meeting made by Jaeckel and second by Maas. Motion passed by unanimous voice vote.

4. Parking Requests: None

5. Speed Limit Reviews: None

6. Traffic Signal Reviews: None

7. Miscellaneous: None

8. Transit Items

a. Update from Brown Cab on ridership and marketing for 2024

- *Service Hours (Brown Cab)*
- *Ridership Trends (Brown Cab)*
- *Institutional Fares (Brown Cab)*
- *Staffing (Brown Cab)*
- *Vehicle Updates (City)*
- *Contract Status (City)*

Chairperson Selle introduced Justin Running of Brown Cab to discuss the 2024 taxi update.

Running discussed current fares noting that ridership is up from the same time last year.

Selle asked if Brown Cab has experienced any changes this year. Running indicated the current ridership is normal for the reduced hours the City has been operating with for the last several years. The City currently has an 8,000 hour service year.

Running discussed possible increases in ridership in upcoming years of the contract. He indicated they are pleased with the increase in ridership.

Selle gave an update on the current fleet of vehicles.

The City and Brown Cab are in year two of a five-year contract. Fares were increased in 2023. There will be no increase in 2025.

9. Safe Routes to School

a. *Update on **State/Municipal Agreement** for the construction of in-fill sidewalks as a part of the Safe Routes to School Plan*

Chairperson Selle gave an update on SRTS grants received. The grant for the high school sidewalk and infill sidewalk was awarded to the City. The next step is to engage in the design of the sidewalk.

Maas asked if the South Main project was a part of the same project. Selle indicated it is a different project. The east side of the street will have the path. All the work will be within the right of way. The work is targeted for 2026. The project is in conjunction with the Town of Koshkonong.

10. Adjournment

Bump moved to adjourn, seconded by Jaeckel. Meeting adjourned at 3:25 p.m.



Permit Report

11/01/2024 - 11/30/2024

Permit Date	Permit #	Permit Location	Owner Name	Permit Type	Permit Description	Estimated Project Cost	Total Fees
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Group: Add/Alter Commercial

11/13/2024	24717	737 Reena Ave	Tom Pientka	Add/Alter Commercial	This project involves selective remodeling and will not affect the entire building. Work will focus on the existing lobby, reading area, dining room, boardroom, conference room, and second-floor common area. The scope includes replacing flooring and wall base, repainting, updating light fixtures, and adding new fixtures as needed. The small reading area with an electric fireplace near the lobby will be rearranged to create a new boardroom with an adjacent mailroom, while the	232,500	
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					existing boardroom will be reconfigured into office space with an adjacent workroom. An electric fireplace will be added in the main lobby, and the existing electric fireplace on the first floor will be relocated to the second-floor common area. Additionally, new double swing doors will be installed in the kitchen prep area, and a new opening will be created between the dining room and private dining room.		

Group Total: 1

Group: Electrical

11/20/2024	24729	1423 Endl Blvd	Timothy R Dougherty and Lindsay L Dougherty	Electrical	Reconnect electrical after fire.	2,000	\$70.00
11/20/2024	24726	714 W Sherman Ave	Nate Fuller	Electrical	lights and outlets	1,000	\$40.25
11/15/2024	24722	1113 Elsie St	Jean Brooks	Electrical	Roof Mounted PV Solar Installation; 12 Panels	7,901	\$70.00
11/13/2024	24716	1708/1710 Montclair Pl	Tempo Designed Homes LLC	Electrical	Electrical for New Twin Home	0	\$365.00

11/8/2024	24709	700 Frederick Ave	Kirsten Crossgrove	Electrical	10 panel rooftop solar install.	3,300	\$70.00
11/7/2024	24706	511 Madison Ave	Oak Tree Child and Family Services	Electrical	REPAIR CODE VIOLATIONS IN BASEMENT	2,000	\$35.00
11/6/2024	24703	1105 Miller Ln	Wendy Zautner	Electrical	Roof Top Solar installation	26,386	\$70.00
11/6/2024	24700	710 Zaffke St	Taylor Altreuter	Electrical	WE required service inspection for 1 yr vacancy and water service inspection - Taylor Altreuter will take ownership of the property on 11/19	0	\$70.00
11/4/2024	24697	320 Clarence St	Robert Cassiday	Electrical	100 AMP SUB PANEL- WIRING OF NEW GARAGE	5,000	\$102.50
							\$892.75

Group Total: 9

Group: Fence

11/15/2024	24720	1002 Pawnee Ct	Benjamin Kubly	Fence	4ft wood fence	10,000	\$85.00
11/5/2024	24699	725 Caswell St	tom cook	Fence	6' vinyl fence	8,485	\$85.00
11/5/2024	24698	518 Lexington Blvd	ulrich	Fence	6' white vinyl fence 1-10' gate	15,505	\$85.00
11/4/2024	24694	721 Caswell st	ron reynolds	Fence	6' clay dany vinyl fence	3,100	\$85.00
							\$340.00

Group Total: 4

Group: HVAC

11/18/2024	24725	105 N Fourth St	Jessica Padinger	HVAC	furnace replacement	2,000	\$70.00
11/13/2024	24715	318 Monroe St	Jason Guerra	HVAC	Installation of new furnace and A/C Install duct	12,000	\$198.80

					work for new 4 season porch, ducting for second story.		
11/13/2024	24714	1708/1710 Montclair Pl	Tempo Designed Homes LLC	HVAC	HVAC for New Twin Home	0	\$455.60
							\$724.40

Group Total: 3

Group: Other

11/28/2024	24733	308 White St.	Timothy Perkins	Other	Adding wall to living room to create an additional bedroom	2,700	\$104.00
11/15/2024	24723	235 Hake St	7 In The Woods Properties llc.	Other	change flat roof to metal roof with pitch	10,400	\$70.00
11/4/2024	24693	217 Shirley St	Matthew Rausch	Other	Putting in New Plumbing and Electrical. Also finishing and remodeling interior of house.	0	
							\$174.00

Group Total: 3

Group: Plumbing

11/27/2024	24732	1108 Charles St	Marilyn & Bill Bauer	Plumbing	Relocate drain and install shower valve for shower in 1st floor bath (for Kohler Company)	500	\$35.00
11/8/2024	24711	641 Monroe St	Lenova George	Plumbing	Bathroom Addition in basement	10,000	\$53.00
11/7/2024	24707	111 N Third St	Spot on	Plumbing	Replace Water Lateral	9,000	\$160.00
							\$248.00

Group Total: 3

Group: Right of Way Opening Permit

11/26/2024	24731	29 Rockwell Av	AT&T	Right of Way Opening Permit	Excavate in the Right of Way		
11/13/2024	24718	310 MARTIN ST	JEFF BRISTOL	Right of Way Opening Permit	APPROACH AND CITY SIDEWALK	0	\$50.00
11/13/2024	24713	218 N MAIN ST		Right of Way Opening Permit	GAS MAIN EXTENSION	0	\$50.00
11/6/2024	24705	318 LINCOLN ST		Right of Way Opening Permit	GAS SERVICE REPLACEMENT	0	
11/6/2024	24704	312 LINCOLN STREET		Right of Way Opening Permit	GAS SERVICE REPLACEMENT	0	\$50.00
11/6/2024	24702	E CRAMER ST (JEFFERSON ST TO N HIGH ST)		Right of Way Opening Permit	GAS MAIN PAVING RELOCATION	0	\$50.00
11/6/2024	24701	ERICK ST (TALCOTT TO W ROCKWELL AVE		Right of Way Opening Permit	GAS MAIN PAVING RELOCATION	0	\$50.00
11/4/2024	24696	218 N Main St		Right of Way Opening Permit	Replacing front walk where heaved	0	\$50.00
							\$300.00

Group Total: 8

Group: Sign

11/25/2024	24730	1815 Janesville Ave	Todd Willkomm	Sign	Monument replacement & building sign	20,000	\$145.00
							\$145.00

Group Total: 1

Group: Single Family Alteration/Addition

11/20/2024	24728	1233 Lillian St	Tony McDonald	Single Family Alteration/Addition	Roof Mounted PV Solar Installation; 37 Panels	21,992	
11/20/2024	24727	1108 Charles St.	Marilyn & Bill Bauer	Single Family Alteration/Addition	replacing current tub base with new shower base.	15,033	\$47.00
11/18/2024	24724	1105 Miller Ln	Wendy Zautner	Single Family Alteration/Addition	Roof Top Solar installation	26,386	\$298.00
11/12/2024	24712	1113 Elsie St	Jean Brooks	Single Family Alteration/Addition	Roof Mounted PV Solar Installation; 12 Panels	7,901	\$114.00

11/8/2024	24710	318 Monroe St		Single Family Alteration/Addition	Remodeling Home, rebuilding existing front porch, removing existing rear porch and converting to living space.	50,000	\$459.00
11/8/2024	24708	700 Frederick Ave	Kirsten Crossgrove	Single Family Alteration/Addition	10 panel rooftop solar install.	11,600	\$185.00
11/4/2024	24695	641 Monroe St	marian capeck	Single Family Alteration/Addition	framing walls for basement and add to basement bathroom	694	\$55.00
							\$1,158.00

Group Total: 7

Group: Zoning

11/14/2024	24719	807 Madison Ave		Zoning	Concrete ADA Ramp	6,000	\$25.00
							\$25.00

Group Total: 1

							\$4,007.15
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Total Records: 40

12/2/2024



Jedidiah Draeger
Building Inspector/Zoning Administrator



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action relating to the City Clerk-issued License and Permit Report for November 2024 (Ebbert, Clerk/Treasurer/Finance Director)

BACKGROUND

The following is a list of the Licenses and Permits issued by the City Clerk for the period of November 19, 2024 through December 16, 2024 per the City of Fort Atkinson Municipal Code of Ordinances.

DISCUSSION

BEEKEEPING

None

OPERATOR

Licensing Period – July 1, 2024 – June 30, 2026

Applicant		Place of Employment	Recommended Approval by Fort Atkinson Police Department	Cost
Harapreet	Singh	Sunny's Quick Mart	Y	\$40
Savannah	Dvorak	The Langholf	Y	\$40
Tanya	Hoekstra	Festival Foods	Y	\$30
Alexander	Graves	Festival Foods	Y	\$30
Alexa	Dahnert	American Legion	Y	\$30
Shelby	Hodawanus	Paddy Shack & 10-62	Y	\$30

MOBILE MERCHANT

Kenneth Bass	Rabl's Trees	1680 Madison Ave	Y	\$75
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DOOR-TO-DOOR RESIDENTIAL / DIRECT SELLER

Samuel O'Reilly Sidex CorpY	\$75
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FINANCIAL ANALYSIS

In accordance with the City's Ordinances and Fee Schedule, a total of \$200 was collected for Operator's licenses, \$75 for Mobile Merchant licenses, and \$25 for Direct Seller licenses.

RECOMMENDATION

These licenses have been issued by the City Clerk's Office in accordance with the City's Ordinances. No further action by the City Council is necessary.

ATTACHMENTS

None

RESOLUTION NO. _____

**RESOLUTION DISCONTINUING
TRILLIUM DRIVE IN THE CITY OF
FORT ATKINSON, JEFFERSON COUNTY, WISCONSIN**

WHEREAS, the abutting property owners to Trillium Drive, have petitioned the City Council of the City of Fort Atkinson that Trillium Drive, in the City of Fort Atkinson, Jefferson County, Wisconsin be discontinued and vacated as described on Exhibit A attached hereto; and

WHEREAS, this Resolution was introduced before the City Council of the City of Fort Atkinson on December 17, 2024, Notice of Hearing was duly published in the Daily Jefferson County Union, and a public hearing was held before the City Council of the City of Fort Atkinson on December 17, 2024 at 7:00 o'clock p.m.

NOW THEREFORE, in accordance with the authority vested in the City of Fort Atkinson by Sec. 66.1003 Wis. Stats.

BE IT RESOLVED by the City Council of the City of Fort Atkinson that Trillium Drive, in the City of Fort Atkinson, Jefferson County, Wisconsin, as described specifically in Exhibit A, be discontinued and vacated.

The above Resolution was duly adopted by the City of Fort Atkinson at a regular meeting held on December 17, 2024.

City of Fort Atkinson City Council

Davin Lescohier, Council President

CERTIFICATION

I hereby certify that the foregoing Resolution was duly adopted by the City Council of the City of Fort Atkinson on the 17th day of December 2024.

Michelle Ebbert,
City Clerk/Treasurer



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to a Resolution Defederalizing American Rescue Plan Act (ARPA) funds in the City of Fort Atkinson, Jefferson County, Wisconsin (Houseman, City Manager)

BACKGROUND

The City of Fort Atkinson received \$1,300,192.78 through the American Rescue Act (ARPA) in 2021 and 2022 as supplemental funding through the federal government to address revenue loss and other needs due to the Coronavirus pandemic (COVID-19). Upon generally accepted advice from the City's auditors and financial advisors, these funds were placed in a newly created fund (Fund 22) to be used for general governmental purposes as recommended by staff and approved by the City Council over the last several years. The City Council and City Manager have used these funds sparingly since 2021 on one-time projects and purchases that would not have been possible without this supplemental revenue.

DISCUSSION

ARPA regulations require that the funds be "allocated" by the end of 2024 and spent by the end of 2026. Over the last several months, the City Manager and Finance Director have attended webinars, read regulations, and sought advice from auditors, financial advisors, and colleagues relating to how best to "allocate" the remaining ARPA funds by the end of 2024 so that they can continue to be used for one-time projects and purchases. The City's Auditors have indicated that in order to properly allocate the funds in compliance with the ARPA regulations, contracts would need to be in place to perform the work or purchase the equipment by the end of 2024. Staff does not have such contracts in place, nor would it be realistic to have a contract in place for a possible project in 2026.

FINANCIAL ANALYSIS

As can be seen in the attached resolution and in the tables below, the City Council has approved expenditures using ARPA funds annually through the budget process in 2021 through 2025.

In 2021-2023, the City used \$434,409.27 to fund the projects outlined in Table 1 below:

TABLE 1: CITY COUNCIL APPROVED ARPA EXPENDITURES 2021-2023

Year	Project	Cost
2021	Council Chambers Tech Upgrades	\$ 32,515.99
2021	Technology Replacement (laptops)	\$ 4,374.21
2021	COVID Lobby Updates/Panels	\$ 5,935.08
2021	Desk & Docking Station	\$ 1,644.52
2021	PS Referendum Communications	\$ 4,928.88
Total 2021		\$ 49,398.68
2022	EMS Start-up Expenditures	\$ 114,265.00
2022	Gen Fund Expenses	\$ 37,504.11
2022	Interior Pool Slide Repainting	\$ 29,000.00
2022	PS Referendum Communications	\$ 22,430.67
2022	Router for Fiber Internet	\$ 10,578.20
2022	Waterslide Restoration-Aquatic	\$ 9,887.50
2022	Facility Mntnce Assessment-MuniBldg	\$ 8,800.00
2022	EMTa Training for Fire/EMS Members	\$ 8,097.00
2022	Aquatic Center Diving Board	\$ 3,500.00
2022	Sealcoat Parking Lot-Senior Center	\$ 2,330.00
2022	Chromebooks, Laptop-Council	\$ 2,048.34
Total 2022		\$ 248,440.82
2023	MI AP Workflow	\$ 7,900.00
2023	New Squads	\$ 17,185.04
2023	Jamesway Siren	\$ 7,475.00
2023	Jamesway Siren	\$ 14,113.00
2023	Trans Utility Study	\$ 10,081.50
2023	2023 Server Upgrade	\$ 79,815.23
Total 2023		\$ 136,569.77
Total expended ARPA Funds 2021-2023		\$ 434,409.27

In 2024, the City budgeted \$370,965.04 for the projects included in Table 2 below:

TABLE 2: CITY COUNCIL APPROVED ARPA EXPENDITURES 2024

Year	Project	Cost
2024	Downtown signal electrical upgrades	\$ 42,000.00
2024	Madison Avenue Street lights	\$ 40,201.74
2024	Municipal Building Roof Repair	\$ 95,785.00
2024	Taxi purchase (2023 per contract)	\$ 14,452.40
2024	Mechanical Pool Cleaner	\$ 11,767.45
2024	Taxi purchase (2024 per contract)	\$ 14,452.40
2024	Operating subsidy - Taxi	\$ 11,095.20
2024	Operating subsidy - Lorman	\$ 25,000.00
2024	Koshkonong Estates Land Purchase	\$ 49,034.85
2024	Koshkonong Estates Studies	\$ 67,176.00
Total 2024		\$ 370,965.04

Final invoices for all of these projects have not been received and will likely not all be paid for in 2024. As such, staff has included the total of \$370,965.04 in the transfer from the ARPA fund (Fund 22) to the general fund for operations.

Table 3 below shows the projects approved within the 2025 budget using ARPA funds. These projects total \$125,000 and will be included in the transfer from the ARPA fund and the transfer to the Assigned Fund Balance - ARPA account in 2025.

TABLE 3: CITY COUNCIL APPROVED ARPA PROJECTS 2025		
Year	Project	Cost
2025	Operating subsidy - Taxi	\$ 10,000.00
2025	Operating subsidy - Lorman	\$ 25,000.00
2025	RRFBs for Janesville Ave and Downtown	\$ 45,000.00
2025	Classification and Compensation Study	\$ 30,000.00
2025	Park Restroom Repair	\$ 15,000.00
Total 2025		\$ 125,000.00

Table 4 below shows the previous, current, and proposed use of the total amount of ARPA funds provided to the City of Fort Atkinson. Note that the remaining defederalized funds (\$494,818.47) can be used at any time in the future with City Council approval. Staff recommended that these funds be transferred to an assigned fund balance account, instead of remaining in the unassigned fund balance, because there are placeholders for use in 2025 and 2026 and so that the funds do not get "lost" in the unassigned fund balance subject to the City's unassigned fund balance policy.

TABLE 4: USE OF ARPA FUNDS	
Total ARPA Supplemental Funding	\$ 1,300,192.78
Total Expended 2021	\$ 49,398.68
Total Expended 2022	\$ 248,440.82
Total Expended 2023	\$ 136,569.77
Remaining funds to be used in 2024	\$ 865,783.51
Total Budgeted 2024	\$ 370,965.04
Remaining Defederalized Funds	\$ 494,818.47

As noted in the resolution, the interest income in the ARPA fund will be transferred for use in 2024 in the general fund - general government. The displaced revenue from that interest income will roll over into the general fund unassigned fund balance and remain there. Table 5 below shows an accounting of the interest income from 2021 through the end of November 2024, which totals \$82,181.29.

TABLE 5: ACCOUNTING OF ARPA INTEREST INCOME	
Interest Earned 2021	\$ 197.44
Interest Earned 2022	\$ 9,176.31
Interest Earned 2023	\$ 40,638.35
Interest Earned 2024 as of 11.30.24	\$ 32,169.19
Total Interest Income as of 11.30.24	\$ 82,181.29

RECOMMENDATION

Staff recommends that the City Council adopt the Resolution Defederalizing American Rescue Plan Act funds, which takes the following actions:

1. Uses the remaining \$865,783.51 of ARPA funds for general fund - general government purposes in 2024.
2. Transfers \$865,783.51 plus any interest income to the general revenue account 01-41-0041-0022 (Transfer in from ARPA fund) by the end of 2024.
3. Transfers \$494,818.47 to the Assigned Fund Balance - ARPA account by January 31, 2025.

ATTACHMENTS

1. Resolution Defederalizing ARPA Funds 12.17.24

RESOLUTION NO. _____

**RESOLUTION
DEFEDERALIZING AMERICAN RESCUE PLAN ACT FUNDS IN THE
CITY OF FORT ATKINSON, JEFFERSON COUNTY, WISCONSIN**

WHEREAS, the City of Fort Atkinson received \$1,300,192.78 through the American Rescue Plan Act (ARPA) in 2021 and 2022 as supplemental funding through the federal government to address revenue loss and other needs due to the Coronavirus pandemic (COVID-19) (also known as Coronavirus State and Local Fiscal Recovery Funds (SLFRF)); and

WHEREAS, the Fort Atkinson City Council has previously authorized the use of funds for the following purposes in 2021-2023, for a total of \$434,409.27:

TABLE 1: CITY COUNCIL APPROVED ARPA EXPENDITURES 2021-2023		
Year	Project	Cost
2021	Council Chambers Tech Upgrades	\$ 32,515.99
2021	Technology Replacement (laptops)	\$ 4,374.21
2021	COVID Lobby Updates/Panels	\$ 5,935.08
2021	Desk & Docking Station	\$ 1,644.52
2021	PS Referendum Communications	\$ 4,928.88
Total 2021		\$ 49,398.68
2022	EMS Start-up Expenditures	\$ 114,265.00
2022	Gen Fund Expenses	\$ 37,504.11
2022	Interior Pool Slide Repainting	\$ 29,000.00
2022	PS Referendum Communications	\$ 22,430.67
2022	Router for Fiber Internet	\$ 10,578.20
2022	Waterslide Restoration-Aquatic	\$ 9,887.50
2022	Facility Mntnce Assessment-MuniBldg	\$ 8,800.00
2022	EMTa Training for Fire/EMS Members	\$ 8,097.00
2022	Aquatic Center Diving Board	\$ 3,500.00
2022	Sealcoat Parking Lot-Senior Center	\$ 2,330.00
2022	Chromebooks, Laptop-Council	\$ 2,048.34
Total 2022		\$ 248,440.82
2023	MI AP Workflow	\$ 7,900.00
2023	New Squads	\$ 17,185.04
2023	Jamesway Siren	\$ 7,475.00
2023	Jamesway Siren	\$ 14,113.00
2023	Trans Utility Study	\$ 10,081.50
2023	2023 Server Upgrade	\$ 79,815.23
Total 2023		\$ 136,569.77
Total expended ARPA Funds 2021-2023		\$ 434,409.27

WHEREAS, through the 2024 budget process, the City Council authorized the following projects and/or purchases to be paid for using ARPA funds, for a total of \$370,965.04:

TABLE 2: CITY COUNCIL APPROVED ARPA EXPENDITURES 2024			
Year	Project	Cost	
2024	Downtown signal electrical upgrades	\$	42,000.00
2024	Madison Avenue Street lights	\$	40,201.74
2024	Municipal Building Roof Repair	\$	95,785.00
2024	Taxi purchase (2023 per contract)	\$	14,452.40
2024	Mechanical Pool Cleaner	\$	11,767.45
2024	Taxi purchase (2024 per contract)	\$	14,452.40
2024	Operating subsidy - Taxi	\$	11,095.20
2024	Operating subsidy - Lorman	\$	25,000.00
2024	Koshkonong Estates Land Purchase	\$	49,034.85
2024	Koshkonong Estates Studies	\$	67,176.00
Total 2024		\$	370,965.04

WHEREAS, SLFRF regulations require the funds to be spent or obligated by the end of 2024 and spent by the end of 2026; and

WHEREAS, the federal guidance provides for a definition of *obligation*, which requires that contracts need to be approved by the City Council by December 31, 2024, to properly allocate ARPA funds for use in 2025 and 2026; and

WHEREAS, the City has an approved budget for the use of ARPA funds in 2025 and placeholders for the use of ARPA funds in 2026 on eligible general government expenditures; however, there are no contracts in place for such expenditures; and

WHEREAS, City staff, along with the City’s Auditors, have recommended that the City use the balance of the ARPA funds in 2024, thereby defederalizing the funds and removing any requirements and timelines for use; and

WHEREAS, the use of the APRA funds for general operating revenue in 2024 will create a revenue surplus in the general fund at the end of 2024, which will roll over into the general fund unassigned fund balance in 2025; and

WHEREAS, such surplus revenue can then be moved to a newly-created “Assigned Fund Balance – ARPA” account, which will be utilized in 2025 and beyond for planned projects in support of general government operations, including the expenditures approved in the 2025 budget outlined in Table 3, and rebranding, strategic planning, and roadwork planned in 2026 and beyond; and

TABLE 3: CITY COUNCIL APPROVED ARPA PROJECTS 2025		
Year	Project	Cost
2025	Operating subsidy - Taxi	\$ 10,000.00
2025	Operating subsidy - Lorman	\$ 25,000.00
2025	RRFBs for Janesville Ave and Downtown	\$ 45,000.00
2025	Classification and Compensation Study	\$ 30,000.00
2025	Park Restroom Repair	\$ 15,000.00
Total 2025		\$ 125,000.00

WHEREAS, any interest income on APRA funds will remain in the general fund unassigned fund balance; and

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Fort Atkinson, Jefferson County, Wisconsin, that \$865,783.51 of ARPA funds be used for general fund – general government operations in 2024 and for the purposes budgeted within the 2024 budget; and

TABLE 4: USE OF ARPA FUNDS		
Total ARPA Supplemental Funding	\$	1,300,192.78
Total Expended 2021	\$	49,398.68
Total Expended 2022	\$	248,440.82
Total Expended 2023	\$	136,569.77
Remaining funds to be used in 2024	\$	865,783.51
Total Budgeted 2024	\$	370,965.04
Remaining Defederalized Funds	\$	494,818.47

BE IT FURTHER RESOLVED that the City Council hereby directs the City's Finance Director to transfer \$865,783.51 plus any interest income to the general revenue account 01-41-0041-0022 prior to December 31, 2024; and

BE IT FURTHER RESOLVED that the City Council hereby directs the City's Finance Director to transfer \$494,818.47 to an assigned general fund fund balance account (Assigned Fund Balance – ARPA) on or before January 31, 2025.

Adopted and effective this 17th day of December 2024.

CITY OF FORT ATKINSON

Davin Lescohier, City Council President

ATTEST:

Michelle Ebbert, City Clerk/Treasurer/Finance Director



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to a Resolution amending the 2024 Annual City of Fort Atkinson Budget relating to a transfer of funds between Tax Increment Districts (Houseman, City Manager)

BACKGROUND

The 2024 Annual Budget was adopted by the City Council on November 21, 2023. This budget document included the general fund budget, all other funds, and the Tax Increment District Budgets for the City's five Tax Incremental Financing Districts (TIDs): 6, 7, 8, 9, and 10.

TID #6 is designated as a distressed TID, and TID #7 and TID #8 have been designated as "donor TIDs" which allows them to allocate, or donate, increment to TID #6. These designations were done through three TID Project Plan Amendments in 2011 with the goal of paying off the debt in TID #6 and allowing it to close.

The City Council adopted Resolution No. 1421 on August 20, 2024, amending the budgets as requested by staff. This proposed budget amendment amends that adopted resolution to ensure that the transfer amount is accurate.

DISCUSSION

The 2024 TID #8 budget, which can be found on page 203 in Section O of the Budget document, includes the anticipated revenues and expenditures within the TID in 2024. The expenditure budget includes a transfer of funds from TID #8 to TID #6 in the amount of \$472,312.38. It also includes street improvements in the amount of \$1,567,048.00. The street improvements account included funding to replace some of the streetlights within TID #8 and within a 1/2 mile of TID #8 along Madison Avenue, as well as a sizable amount of money to put toward infrastructure to support the Banker Road housing development.

The expenditure period for TID #8 ended in September 2024, and the City was not able to sign a contract for the construction of the infrastructure prior to the closure of the expenditure period. Because the funds budgeted for street improvements in 2024 can no longer be used for that purpose, staff is recommending that the City Council reallocate those funds as a donation to TID #6 through this budget amendment. This amendment will still allow TID #6 to close in

2026 per the schedule included with the memo.

Wis. Stats. 65.90(5)(ar) requires that 2/3 of the City Council approve amendments to an adopted budget, along with the publication of a Class 1 notice or publication on the City's website of any such change. The 2/3 requirement is also called a supermajority, and is akin to 4/5 of the full City Council (or 3 of the 4 members present or 2 of the 3 members present).

FINANCIAL ANALYSIS

Note that the 2024 TID #8 budget is not balanced. \$1,001,280.25 in revenue was budgeted and \$2,303,327.88 in expenditures. The difference (\$1,302,048) was the anticipated end of 2023 fund balance in TID #8 when the 2024 budget was adopted. Since that time, the City's auditors identified that the end of year fund balance in TID #8 was \$1,306,329. This amount was reported to the DOR in the TID report as approved by the Joint Review Board and filed by the City Clerk in July 2024. Staff knew that September 2024 was the end of the TID #8 expenditure period and planned to spend down those funds in accordance with the TID Project Plan and 2024 Budget.

Instead of street improvements, the excess revenue in TID #8 may be used to pay down the debt and expenditures in TID #6, and then allow the City Council to close TID #8 as recommended by staff and the City's financial advisors. The proposed budget amendment is outlined on the table below and in the attached Resolution.

BUDGET LINE ITEM		2024	2024	DIFFERENCE	COMMENTS
ACCOUNT NUMBER	DESCRIPTION	ADOPTED	AMENDED		
12-40-0049-2308	TRANS IN FROM TIF 8	\$ 472,213.38	\$ 1,283,476.29	\$ 811,262.91	TID #6 Revenue Account
14-50-0059-2306	TRANS OUT TO TIF 6	\$ 472,213.38	\$ 1,283,476.29	\$ 811,262.91	TID #8 Expenditure Account

Per the adopted budget, TID #8 was to transfer \$472,213.38 to TID #6. The amendment changes that amount to \$1,283,476.29. Note that the transfer of \$472,213.38 has already occurred, and if the Resolution is adopted, the Finance Director would transfer \$811,262.91 from TID #8 to TID #6 for a total of \$1,283,476.29.

The table below shows the impact of the budget amendment on the negative balances in TID #6.

TID #6 DEBT SERVICE & GENERAL FUND DEBT	
General Fund Advances	\$ (1,472,315.00)
Cumulative Neg. Bal.	\$ (816,305.00)
Debt Service	\$ (130,675.00)
Total TID #6 Debt	\$ (2,419,295.00)
TID #6 ANTICIPATED 2024 REVENUE	
Trans in from TID #8	\$ 472,213.38
Trans in from Amend	\$ 811,262.91
Other Revenue	\$ 596,504.00
Total TID #6 Revenue	\$ 1,879,980.29
Est. 2024 EOY Balance	\$ (539,314.71)

If the budget amendment is adopted by the City Council, there will be approximately \$539,314.71 remaining owed to the general fund from advances and for debt service within TID #6. In addition to regular operating revenue and expenditures, all final debt is anticipated to be paid off in 2025, which will also facilitate closure of TID #6 in 2026 per the TID #6-8 Affordable Housing Extension and Closure Timelines plan presented at the TID Workshop and outlined in the attached document.

RECOMMENDATION

Staff recommends that the City Council adopt the Resolution amending the 2024 annual City of Fort Atkinson Budget relating to a transfer between Tax Increment Districts; direct the City Clerk/Treasurer/Finance Director to publish the change on the City's website and transfer the additional \$811,262.91 by December 31, 2024.

ATTACHMENTS

1. Resolution Amending 2024 Budget 12.17.24
2. Res 1421 TID Transfer 8 to 6
3. TIF Housing and Closure timeline COFA

RESOLUTION NO. _____

**A RESOLUTION AMENDING THE
2024 ANNUAL CITY OF FORT ATKINSON BUDGET
RELATING TO A TRANSFER BETWEEN TAX INCREMENT DISTRICTS**

WHEREAS, the 2024 Annual Budget was adopted by the City of Fort Atkinson City Council on November 21, 2023 after due deliberation and public discussion through Resolution No. 1407 and set the appropriate mill rate through Resolution No. 1408; and

WHEREAS, Wis. Stats. 65.90(5)(ar) requires that 2/3 of the City Council approve amendments to an adopted budget and the publication of a class 1 notice or publication on the City's website of any such change; and

WHEREAS, the City of Fort Atkinson has five Tax Increment Districts (TIDs), one of which has been deemed "distressed" (6) and two of which (7 and 8) have been designated as donor TIDs to reduce and eventually eliminate the financial liabilities associated with the distressed TID No. 6; and

WHEREAS, the City has an opportunity to amend the amount of funds donated from a very successful TID No. 8 to the distressed TID No. 6 to facilitate the closure of both TIDs within the foreseeable future; and

WHEREAS, the 2024 Annual Budget was amended by the City Council on August 20, 2024 through Resolution No. 1421, and since that time, staff determined that the transfer did not take into account the transfer of \$472,213.38 that had already occurred prior to the adoption of Resolution No. 1421; and

NOW, THEREFORE, BE IT RESOLVED that the City Council of the City of Fort Atkinson, Jefferson County, Wisconsin, hereby amends the 2024 Annual Budget in the following way:

BUDGET LINE ITEM		2024	2024	DIFFERENCE	COMMENTS
ACCOUNT NUMBER	DESCRIPTION	ADOPTED	AMENDED		
12-40-0049-2308	TRANS IN FROM TIF 8	\$ 472,213.38	\$ 1,283,476.29	\$ 811,262.91	TID #6 Revenue Account
14-50-0059-2306	TRANS OUT TO TIF 6	\$ 472,213.38	\$ 1,283,476.29	\$ 811,262.91	TID #8 Expenditure Account

BE IT FURTHER RESOLVED that the City Clerk shall, within 15 days of the passage of this Resolution, publish on the City's website the changes made herein as required under Wis. Stats. §65.90(5)(ar) and complete the transfer of funds as described in this Resolution.

Adopted and effective this 17th day of December 2024.

CITY OF FORT ATKINSON

Davin Lescohier, President

ATTEST:

Michelle Ebbert, City Clerk/Treasurer/Finance Director

RESOLUTION NO. 1421

**A RESOLUTION AMENDING THE
2024 ANNUAL CITY OF FORT ATKINSON BUDGET
RELATING TO A TRANSFER BETWEEN TAX INCREMENT DISTRICTS**

WHEREAS, the 2024 Annual Budget was adopted by the City of Fort Atkinson City Council on November 21, 2023 after due deliberation and public discussion through Resolution No. 1407 and set the appropriate mill rate through Resolution No. 1408; and

WHEREAS, Wis. Stats. 65.90(5)(ar) requires that 2/3 of the City Council approve amendments to an adopted budget and the publication of a class 1 notice or publication on the City's website of any such change; and

WHEREAS, the City of Fort Atkinson has five Tax Increment Districts (TIDs), one of which has been deemed "distressed" (6) and two of which (7 and 8) have been designated as donor TIDs to reduce and eventually eliminate the financial liabilities associated with the distressed TID No. 6; and

WHEREAS, the City has an opportunity to amend the amount of funds donated from a very successful TID No. 8 to the distressed TID No. 6 to facilitate the closure of both TIDs within the foreseeable future; and

WHEREAS, the City's final 2023 Audit (Baker Tilly) shows TID No. 8 had a positive fund balance of \$1,306,329, which can be donated to TID No. 6 in 2024 by amending the 2024 budget as recommended by City staff and the City's financial advisors.

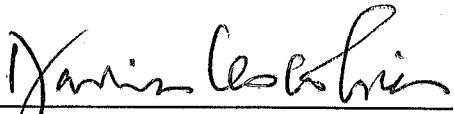
NOW, THEREFORE, BE IT RESOLVED that the City Council of the City of Fort Atkinson, Jefferson County, Wisconsin, hereby amends the 2024 Annual Budget in the following way:

BUDGET LINE ITEM		2024	2024	COMMENTS
ACCOUNT NUMBER	DESCRIPTION	ADOPTED	AMENDED	
12-40-0049-2308	TRANS IN FROM TIF 8	\$ 472,213.38	\$ 1,778,542.38	TID #6 Revenue Account
14-50-0059-2306	TRANS OUT TO TIF 6	\$ 472,213.38	\$ 1,778,542.38	TID #8 Expenditure Account
14-50-0064-3100	STREET IMPROVEMENTS	\$ 1,567,048.00	\$ 260,719.00	TID #8 Expenditure Account

BE IT FURTHER RESOLVED that the City Clerk shall, within 15 days of the passage of this Resolution, publish on the City's website the changes made herein as required under Wis. Stats. §65.90(5)(ar).

Adopted and effective this 20th day of August 2024.

CITY OF FORT ATKINSON


Davin Lescohier, President

ATTEST:


Michelle Ebbert, City Clerk/Treasurer/Finance Director

City of Fort Atkinson

TID # 6-8 Affordable Housing Extension and Closure Timelines



<i>Tuesday, August 20, 2024</i>	City Council TID Workshop Common Council Adopts TID # 8 Affordable Housing Extension Resolution.
<i>Tuesday, April 1, 2025</i>	Common Council Adopts TID # 8 Termination Resolution.
<i>Tuesday, August 19, 2025</i>	City Council TID Workshop Common Council Adopts TID # 6 & 7 Affordable Housing Extension Resolutions.
<i>Tuesday, April 7, 2026</i>	Common Council Adopts TID # 6 & 7 Termination Resolutions.
<i>Thursday, July 9, 2026</i>	JRB First TID # 11 & TID # 12 Creation Meetings.
<i>Tuesday, July 21, 2026.....</i>	Plan Commission Adopts TID # 11 & TID # 12 Creation Resolutions.
<i>Tuesday, August 18, 2026</i>	<i>City Council TID Workshop</i> <i>Common Council Adopts TID # 11 and TID # 12 Creation Resolutions.</i>
<i>Thursday, September 3, 2026.....</i>	<i>JRB Adopts TID # 11 and TID # 12 Creation Resolutions.</i>
<i>Friday, October 30, 2026.....</i>	Submission Deadline for TID # 11 and TID 12 Creation Documents to DOR.



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Jedidiah Draeger, Building/Zoning Administrator

RE: Second and possible third/final reading of an ordinance relating to a Zoning Map Amendment to change the zoning district for the property located at 211 Memorial Drive (parcel number 226-0514-0312-050), from Single Family Residential (SR-5) to Institutional (I) (ZMA-2024-02) (Draeger, Building Inspector/Zoning Administrator)

BACKGROUND

The proposed rezoning includes one parcel located at the corner of Sherman Avenue and Memorial Drive. The 0.68-acre property is currently developed with an 8,000 square foot, single-story, commercial-style building with the remainder of the site devoted to surface parking. This was the former location of the Fort Family Dental Clinic prior to that use moving out to Madison Avenue.

Located on the far East side of Fort Atkinson, the property is one block from the Fort Healthcare Hospital campus and is surrounded by single and two-family residential on all four sides. The applicant is seeking to rezone the property from Single-Family Residential (SR-5) to Institutional (I) to better match the existing development on the site today and reflect the similar uses that were formally on the site.

The proposed future use of the property is consistent with its current use, which would not be permitted under the SR-5 Zoning District, but would be permitted by-right under the Institutional Zoning District.

DISCUSSION

The applicant is proposing to rezone the property to Institutional to enable the current and future use of the property. This is consistent with how the property has been developed, is currently oriented, and was used when it was a dental practice just a few years ago. The City's Management Team has reviewed the application, and all comments have been included within this document.

The proposed rezoning aims to provide additional land use opportunities for the property that mirrors the neighborhood characteristics of intermixed Institutionally-zoned properties

throughout this area and the existing development patterns of the site. Overall, the proposed rezoning meets the requirements of the City's ordinances, is in alignment with adopted City plans, and can provide activation of an existing vacant building and site.

FINANCIAL ANALYSIS

The Zoning Map Amendment will have no financial impact on the City.

RECOMMENDATION

A Public Hearing was held at the Plan Commission meeting on November 26, 2024. Also, at that meeting, the Plan Commission recommended the City Council perform three readings and adopt the ordinance, amending the Official Zoning Map. The City Council held the first reading of the ordinance at the meeting on December 3, 2024.

City staff recommends that the City Council perform a second reading of the ordinance and suspend the rules for the third/final reading, amending the Official Zoning map for the property located at 211 Memorial Drive from (SR-5) Single Family to (I) Institutional.

ATTACHMENTS

1. Application
2. Owner Justification
3. Public Notice Sherman Ave with ZMA Map
4. Healthcare Planning Area
5. Future Land Use Map
6. Ord. ZMA-2024-02 211 Memorial Dr

City of Fort Atkinson Procedural Checklist for Zoning Map Amendments (Rezoning) Requirements per Section 15.10.31

This form is designed to be used by the Applicant as a guide to submitting a complete application to amend the Official Zoning Map and by the City to process the application.

Name, company, and client (if applicable): Curt Polzin, Polzin Property LLC

Phone number: 715-764-0904 Email: curt.polzin@fortfamilydental.com

Property address of requested zoning change: 715 E Sherman Ave, Fort Atkinson, WI 53538
211 Memorial Dr, Fort Atkinson, WI 53538

Zoning change request from Single Family Residential - 5 (SR-5) to Institutional (I)

I Application Packet Requirements

The Applicant shall submit an electronic or paper copies, as may be required by the City, of the application.

- ☐ A map of the subject property to scale, depicting the following:
 - ☐ All lands for which the zoning is proposed to be amended and all other lands within 100 feet of the boundaries of the subject property.
 - ☐ All parcel numbers for the subject property.
 - ☐ Current zoning of the subject property and its environs, and the jurisdiction(s) which maintains that control.
 - ☐ All lot dimensions of the subject property.
 - ☐ A graphic scale and north arrow.
- ☐ Legal description of the property.
- ☐ Written justification for the proposed Official Zoning Map amendment, including evidence that the application is consistent with the Comprehensive Plan.
- ☐ Any further information needed by the Plan Commission to facilitate the making of a comprehensive report to the Plan Commission and City Council.

II Criteria Used to Evaluate the Proposed Zoning Map Amendment

The Zoning Administrator shall review the complete application and evaluate whether the proposed amendment:

1. Advances the purposes of this Chapter as outlined in Section 15.01.03 and the applicable rules of Wisconsin Department of Administration and the Federal Emergency Management Agency.
2. Is in harmony with the Comprehensive Plan.
3. Maintains the desired overall consistency of land uses, land use intensities, and land use impacts within the pertinent zoning districts.

4. Addresses any of the following factors that are not properly addressed on the current Official Zoning Map:
 - a. The designations of the Official Zoning Map are not in conformance with the Comprehensive Plan.
 - b. A mapping mistake was made, including the omission on the Official Zoning Map of an approved zoning map amendment.
 - c. Factors have changed (such as new data, infrastructure, market conditions, development, annexation, or other zoning changes), making the subject property more appropriate for a different zoning district.
 - d. Growth patterns or rates have changed, creating the need for an amendment to the Official Zoning Map.

III Process Checklist

- | | |
|--|-------------|
| ☐ Staff-Applicant meeting (if applicable) | Date: _____ |
| ☐ Application fee of \$200.00 received by City Clerk | Date: _____ |
| ☐ Reimbursement of professional consultant costs agreement executed. | Date: _____ |
| ☐ Receipt of complete application packet by Zoning Administrator | Date: _____ |
| ☐ City Staff input | Date: _____ |
| ☐ Class 2 legal notice sent to official newspaper by City Clerk | Date: _____ |
| ☐ Class 2 legal notice published on _____ and _____ | Date: _____ |
| ☐ Notification of neighboring property owners within 100 feet of the petition | Date: _____ |
| ☐ Notification of clerks of municipalities within 1,000 feet of the petition | Date: _____ |
| ☐ Notification of airports within 1 mile of the petition | Date: _____ |
| ☐ Plan Commission Public Hearing, review and recommendation | Date: _____ |
| ☐ City Council review and action | Date: _____ |

Justification for Proposed Official Zoning Map Amendment

All other commercial style buildings in this area are zoned (I) Institutional, which also more accurately suits the historic and current use of the property/building.

Parcel Numbers in the area, zoned Institutional, with commercial style buildings: 226-0514-0312-033, 226-0614-3434-026, 226-0614-3434-039, 226-0614-3434-040, 226-0614-3434-022, 226-0614-3434-038, 226-0614-3434-042, 226-0614-3434-044, 226-0614-3443-017, 226-0614-3434-021, 226-0614-3434-043

Parcel Numbers in the area, zoned Institutional, with residential style buildings: 226-0514-0312-033, 226-0614-3434-025

Parcel Numbers in the area, zoned Residential, with commercial style buildings: none (besides the parcel being requested to be rezoned Institutional 226-0514-0312-050)

Legal Description

LOTS 18, 19 & 20, BLK 3, WEIDEMANN 2ND ADD.

Parcel Number

226-0514-0312-050

Parking

There are a total of 31 parking stalls on the property: 23 in the front of the building and 8 in the back of the building.

Ingress/Egress

There are three different ingress/egress to the property. One is located off Sherman Ave and the other two are off Memorial Dr.



City of Fort Atkinson
City Manager's Office
101 N. Main Street
Fort Atkinson, WI 53538

November 4, 2024

NOTICE TO THE PUBLIC

OFFICIAL NOTICE IS HEREBY GIVEN the Fort Atkinson Plan Commission will hold a public hearing to review and make a recommendation to the City Council on a request for a Zoning Map Amendment for the property located at 715 Sherman Ave. E. (parcel number 226-0514-0312-050), from Single Family Residential (SR-5) to Institutional (I). This zoning change has been requested to accommodate current and future use.

Said public hearing will be held in person at the Fort Atkinson Municipal Building, 101 N. Main St. and via Zoom on Tuesday, Nov. 26, 2024 at 4:00 p.m. at the City of Fort Atkinson Plan Commission meeting. Those interested in attending this meeting should follow the below link, or dial in for audio access.

<https://us02web.zoom.us/j/82214860406?pwd=TEVyUVdQM05VNFVzb0E2TUNTU05VZlZzO9>

Meeting ID: 822 1486 0406

Passcode: 53538

Dial by your location

+1 312 626 6799

Any interested party will be given the opportunity to be heard at that time. The City Council will likely review the rezoning request at the meeting on Tuesday, Dec. 3, 2024 and again on Tuesday, Dec. 17, 2024.

The Plan Commission is seeking input from the public. For more information, please contact Building/Zoning Administrator Jedidiah Draeger at jdraeger@fortatkinsonwi.gov or (920)-397-9901. You may attend the public hearing via Zoom or submit a letter or email expressing your thoughts.

If you have special needs or circumstances which make communication or accessibility difficult at the meeting, please call (920)-397-9901 prior to the meeting date. Accommodations will, to the fullest extent possible, be made available on request to a person with a disability.

Jedidiah Draeger
Building/Zoning Administrator

Zoning Map Amendment



10/28/2024, 11:41:52 AM

Jefferson County Tax Parcels

City of Fort Atkinson Municipal Boundary 2022

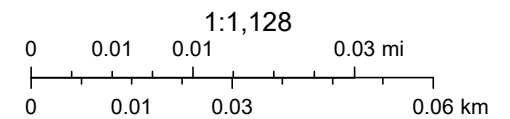
City of Fort Atkinson Base Zoning

SR-2 - Single Family Residential - 15,000sf

SR-5 - Single Family Residential - 8,000sf

I - Institutional

City of Fort Atkinson 1.5 Mile Extra-Territorial Jurisdiction



HEALTHCARE CENTER PLANNING AREA

FIGURE: 2.15

CITY OF FORT ATKINSON
FUTURES OPEN HOUSE



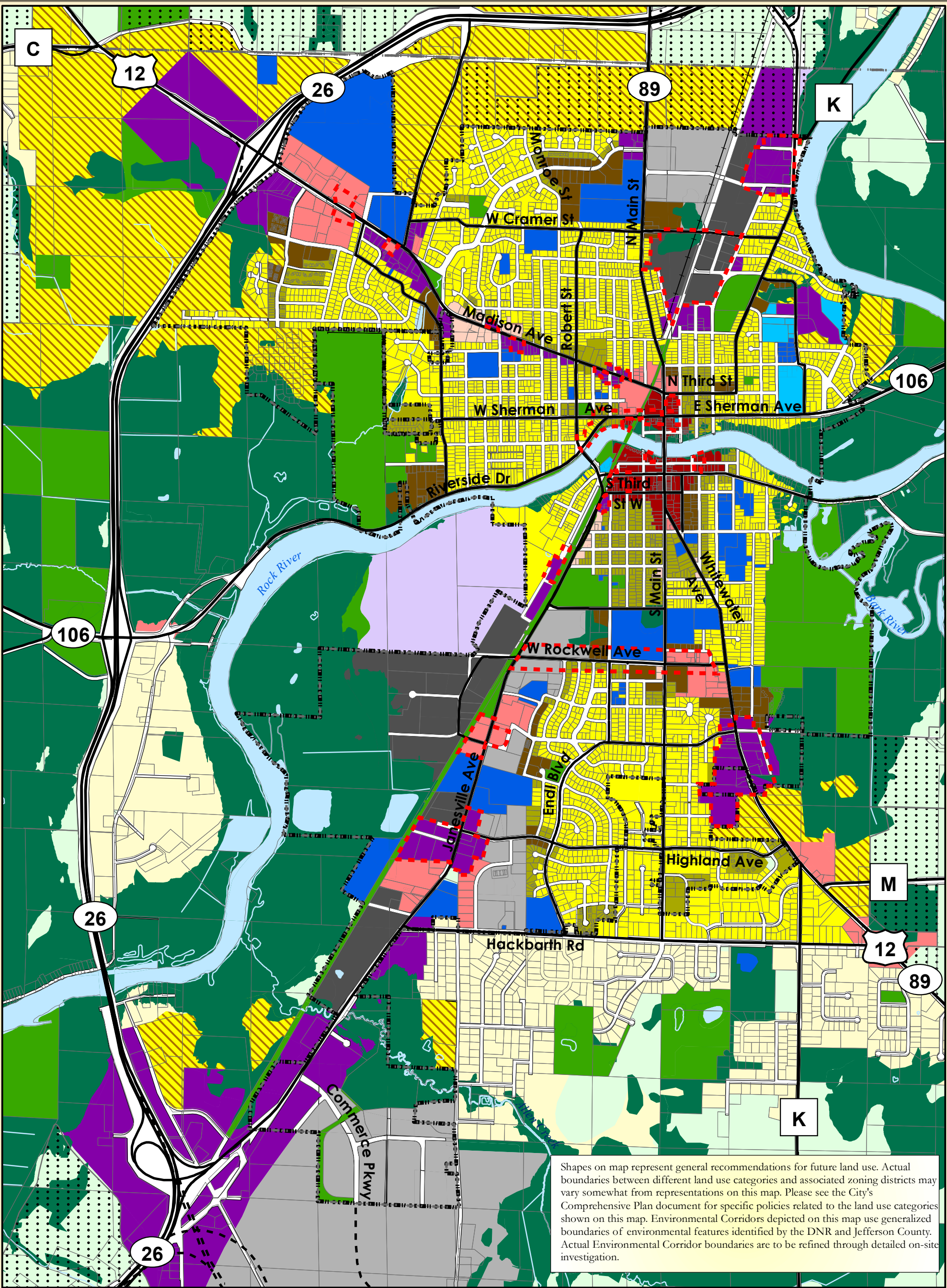
Opportunities

- Fort Atkinson Healthcare as regional marketing asset
- Healthcare expansion balanced with neighborhood preservation
- Single story healthcare building sites can expand up
- Access and wayfinding improvements
- Neighborhood preservation & senior housing development

Note: This map is not a Detailed Future Land Use Map or Future Transportation Map for zoning and other decision making. The purpose of this map is to show conceptual future growth options and facilitate public discussion.

Conceptual Land Uses

- Community Commercial
- Downtown
- Major Institutions
- Mixed-Use
- Neighborhood
- Employment
- Environmental Corridors
- Agriculture
- Existing Major Roads
- Potential Future Roads
- Main Trails (Existing & Proposed)



**City of Fort Atkinson
Comprehensive Plan**

Map 7: Future Land Use - City View

- City Boundaries
- Town Boundaries
- Parcels
- Right of Way
- Major Roads
- Previously Proposed Hwy 12 Bypass

- AG - Agriculture/Rural
- P - Parks
- EC - Environmental Corridor
- SF-U - Single Family Residential - Urban
- SF-E - Single Family Residential - Exurban
- TF - Two Family/Townhouse Residential
- MR - Manufactured Residential
- MF-R - Multi-Family Residential

- PN - Planned Neighborhood
- NC - Neighborhood Commerical
- CC - Community Commerical
- DT - Downtown
- LI - Light Industrial/Business Park
- GI - General Industrial
- CF - Community Facilities
- HF - Health Facilities
- PMU - Planned Mixed Use

- F-H - Farm-Historic
- UGA - Long Range Urban Growth Area
- Future Redevelopment Opportunity Area
- Surface Water

Sources: Jefferson County - County Land Use; Vandewalle and Associates - Fort Atkinson Land Use

0 0.125 0.25 0.5 0.75 Miles

VANDEWALLE & ASSOCIATES INC. 3/19/19
Shaping places, shaping change Amended: 6/6/23

ORDINANCE NO. ____

**AN ORDINANCE
TO AMEND THE OFFICIAL ZONING MAP OF THE CITY OF FORT ATKINSON**

NOW, THEREFORE, the City Council of the City of Fort Atkinson, Wisconsin, do ordain as follows:

Section 1. Section 15.02.03 of the City of Fort Atkinson Zoning Ordinance, adopting the Map of Standard Zoning Districts, is hereby amended to change the zoning classification of the following described property from SR-5, Single-family Residential – 5, to I, Institutional:

Lots 18, 19, and 20 of Block 3, in the Weidemann Second Addition to the City of Fort Atkinson, Jefferson County, Wisconsin, consisting of 0.68 acres of land, addressed 211 Memorial Drive, parcel number 226-0514-0312-050.

Section 2. All ordinances or parts of ordinances in conflict herewith are hereby repealed.

Section 3. This ordinance shall take effect upon passage, posting, or publication as provided by law.

Enacted by the City Council of the City of Fort Atkinson, Jefferson County, Wisconsin, this _____ day of _____, 2024.

CITY OF FORT ATKINSON

Davin Lescohier, President

ATTEST:

Michelle Ebbert, City Clerk/Treasurer/Finance Director



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to a Development Agreement between the City of Fort Atkinson and Intrepid Investments for the Ridge View Estates Subdivision (Houseman, City Manager)

BACKGROUND

City staff has been working with Intrepid Investments on a draft development agreement since the Pre-Development Agreement was approved by the City Council in May 2024. The attached draft of the Agreement represents months of negotiation over the responsibilities for various public and private infrastructure, as well as tax increment financing incentives for the multi-family residential development.

DISCUSSION

Per the Agreement, the City is responsible for the public infrastructure, and the Developer is responsible for the private infrastructure. The Developer has committed to having site plans and building elevations for review by the Plan Commission in early 2025, by March 1st at the latest. However, it will likely be earlier than that due to the anticipated construction start date of April 1, 2025 on the multi-family residential building.

The City is offering a pay-go tax increment financing package including a total of \$3,342,640 in returned tax increment between 2027 and 2041. This is based on a minimum of \$14,000,000 in added value in TID #9. If the assessed value of the multi-family project is in excess of that amount, the pay back will be accelerated, but not more than the total incentive. Additionally, if the Developer builds another multi-family building, which the site will allow, they will have an opportunity to negotiate an amendment with the City for additional TIF incentives. There will be no incentive on the owner-occupied portion of the project (north of Trillium Drive). The Developer has committed to paying the City \$18,000 per residential unit to repay the debt service for the public infrastructure.

The Developer will pay the City's new park impact fees, and the City is committing to dedicating and improving a park on the east side of the relocated Banker Road within two years of the completion of that road construction project.

FINANCIAL ANALYSIS

The attached pro forma from the City's financial advisors shows how the TID will cash flow over its life based on this development, meaning that the increment generated by the development (construction increment) and the 1% assumed inflation increment will be enough to pay for the development incentive, the external debt service, and the internal debt service for the public infrastructure.

Note that the TIF incentive is paid as the developer adds value to the District. If the value is not added, the incentive is not paid to the Developer. Pay-go incentives are generally less risky to municipalities than up-front incentives.

RECOMMENDATION

The City Council reviewed an earlier draft of this Agreement at the meeting on December 3rd. The Economic Development Commission reviewed the Agreement on December 11th and recommended that the City Council approve it subject to any final minor edits by City staff and the Developer.

Staff recommends that the City Council review and approve the attached Development Agreement between the City of Fort Atkinson and Intrepid Investments, LLC, for Ridge View Estates, subject to any final minor edits and exhibit updates by City staff and the Developer.

ATTACHMENTS

1. Developer's Agreement 12.13.24 RH
2. EXHIBIT A from Banker Road Development Plans (10-10-2024) (11x17)
3. Exhibit B View-Front EntryV2
4. Exhibit C tif9 proforma 110724

**DEVELOPMENT AGREEMENT BETWEEN THE CITY OF FORT ATKINSON AND
INTREPID INVESTMENTS, LLC FOR RIDGEVIEW SUBDIVISION**

THIS AGREEMENT is entered into by and between the City of Fort Atkinson, a municipal corporation of the State of Wisconsin located in Jefferson County (the “CITY”) and Intrepid Investments, LLC, a Wisconsin limited liability company (the “DEVELOPER”), collectively known hereinafter as the “PARTIES”.

RECITALS:

WHEREAS, the CITY owns approximately 35 acres of land along the west side of the current Banker Road, more particularly described as Parcel Nos. 226-0614-2232-020 and 226-0614-3322-000 (the “PROPERTY”); and

WHEREAS, the CITY intends to design and install the public improvements, including but not limited to all water, sewer, road, stormwater extensions, parks, trails, street lights, and stormwater retention facilities which may be necessary, all as more particularly set forth in Exhibit A attached hereto and incorporated herein by reference (the “PUBLIC IMPROVEMENTS”) on the PROPERTY; and

WHEREAS, DEVELOPER intends to develop the PROPERTY as mixed use residential property, in the form of up to two (2) multi-family buildings, the first of which shall be a minimum of eighty (80) units and three (3) stories with underground (enclosed) parking, and shall be referred to throughout this Agreement as the “FOR RENT MULTI-FAMILY DEVELOPMENT” and several owner-occupied developments (the “OWNER-OCCUPIED DEVELOPMENT”) (collectively, the “PRIVATE IMPROVEMENTS”); and

WHEREAS, the PUBLIC IMPROVEMENTS and PRIVATE IMPROVEMENTS shall collectively be referred to as the “PROJECT”; and

WHEREAS, the CITY has previously established a tax increment district known as Tax Incremental District No. 9 (the “DISTRICT”) and has formulated a repayment program for DEVELOPER’S development costs and the PUBLIC IMPROVEMENTS in the DISTRICT (the “TID PROJECT PLAN”); and

WHEREAS, the CITY and DEVELOPER acknowledge that their respective rights and obligations under this Agreement shall be applicable to them only in the event that (i) the DEVELOPER has access to the PROPERTY no later than April 1, 2025, (ii) that the CITY installs the public infrastructure identified in this Agreement no later than September 15, 2025, and (iii) that the PROJECT is completed; and

WHEREAS, the CITY and DEVELOPER acknowledge and agree that a high quality development is necessary in order to ensure that the DISTRICT is successful and pays its costs solely from the increment generated by development within the DISTRICT without resorting to general fund tax dollars.

NOW, THEREFORE, in consideration of these Recitals, which are hereby made a part of and incorporated into this Agreement, the mutual agreements, benefits and responsibilities outlined

herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the PARTIES agree as follows:

ARTICLE I- CITY OBLIGATIONS

1.01 GENERALLY. The CITY shall, except as herein provided, design, install, and maintain the PUBLIC IMPROVEMENTS on the PROPERTY. It is the intent of this Agreement that all PUBLIC IMPROVEMENTS included and described as “CITY Obligations” herein shall be installed on the PROPERTY in a good and workmanlike manner by the CITY.

1.02 THE PROJECT. The CITY and DEVELOPER shall generally proceed with the PROJECT as follows:

a. The DEVELOPER shall provide the CITY with DEVELOPER’S Plans for the FOR RENT MULTI-FAMILY DEVELOPMENT no later than March 1, 2025 (the “DEVELOPER’S Plans”) which shall include site plans and building elevations.

b. After reviewing the DEVELOPER’S Plans and no later than April 1, 2025, the CITY shall formulate the following:

- a. Screening plan, including platting the subdivision and establishing the proper zoning districts;
- b. Stormwater management plan and agreement;
- c. Any other requirements as set forth in the MUNICIPAL CODE of the CITY; and
- d. All of the requirements set forth in this Agreement.

c. The CITY shall be responsible for all costs of construction for the PUBLIC IMPROVEMENTS, including but not limited to hook-up of all utilities, infrastructure, gas/electric hook-up and installation, water and sewer installation and hook-up, survey costs, construction costs, site excavation costs, and all other costs associated with all of the PUBLIC IMPROVEMENTS. The DEVELOPER shall not be responsible for any costs of the PUBLIC IMPROVEMENTS, except that DEVELOPER shall be responsible for a portion of the costs associated with the stormwater detention pond. DEVELOPER’S portion of the costs associated with the stormwater detention pond shall not exceed Forty-Five Thousand Dollars (\$45,000.00).

d. The PUBLIC IMPROVEMENTS to be installed by the CITY, in addition to a timeline for installing the same, are outlined in Exhibit A.

e. The DEVELOPER’S Plans for the FOR RENT MULTI-FAMILY DEVELOPMENT are described on page 1 of this Agreement, and the building is shown in concept through Exhibit B. Site plans and building elevations will be reviewed by the City Plan Commission through the Site Plan Review Process prior to the issuance of building permits.

f. The CITY shall permit representatives of the DEVELOPER to have access to any part of the PROPERTY at all reasonable times to obtain data and to make various tests concerning the PROPERTY necessary to carry out this Agreement, with the exception of the north-south road to be named Hawthorne Drive. Hawthorne Drive is currently in use as an access driveway to the Fort Atkinson High School. DEVELOPER may access the Hawthorne Drive area at reasonable times

and with reasonable notice to the CITY, and the CITY will notify the School District, and the CITY will not unreasonably deny DEVELOPER'S access to Hawthorne Drive. No compensation shall be paid, nor shall any charges be rendered for the access provided for in this section.

g. The CITY shall permit representatives of the DEVELOPER to have direct access to and discussions with all consultants contracted by the CITY related to the PROJECT at all reasonable times necessary to carry out this Agreement. DEVELOPER may be responsible for reasonable costs relating to the CITY'S third-party contracted consultants when accessed and consulted relating to the PRIVATE IMPROVEMENTS. DEVELOPER shall not be responsible to pay any amounts for discussions or consultations with CITY staff.

h. The CITY represents that it will meet all CITY specifications for planned infrastructure associated with the PUBLIC IMPROVEMENTS, including but not limited to water, sewer, roads, and sidewalks.

1.03 PUBLIC IMPROVEMENTS. The CITY shall install all of the PUBLIC IMPROVEMENTS set forth on Exhibit A, including but not limited to the following:

a. The CITY shall design and install all of the water supply facilities, including an extension of water main of a size to be reasonably established by the CITY from the main already installed by the CITY into the PROPERTY together with necessary private water laterals to service the buildings for the complete development of the PROPERTY.

b. The CITY shall design and install all of the sanitary sewer facilities, including an extension of sanitary sewer main of a size to be reasonably established by the CITY from the CITY sanitary sewer interceptor to that which is already installed by the CITY.

c. The CITY shall be responsible for and cause electrical power, telephone and/or other similar telecommunications facilities, and natural gas facilities to be installed on the PROPERTY. All such services shall be located underground in accordance with applicable codes.

d. In order to minimize and control erosion, siltation, sedimentation and washing of soils during the period of construction, the CITY shall evaluate, initiate and undertake such measures as may be necessary for all PUBLIC IMPROVEMENTS.

e. The CITY shall design and install storm water drainage facilities adequate to accommodate expected surface water flow within and through the PROPERTY relating to the PUBLIC IMPROVEMENTS.

f. The CITY shall complete all landscaping and seeding, matting/mulching or sodding of CITY right-of-way to the extent shown on the PROPERTY Plans.

g. The CITY shall design and install all public streets and street improvements (if any) within the PROPERTY in addition to all water, sewer, and storm laterals that are necessary to service the PRIVATE IMPROVEMENTS. This shall include those improvements to streets abutting the development. The CITY agrees to work with the DEVELOPER to ensure that the water, sewer, and storm laterals are sized appropriately for the PRIVATE IMPROVEMENTS.

1.04 FINANCIAL INCENTIVE TO DEVELOPER FOR THE FOR RENT MULTI-FAMILY DEVELOPMENT. In consideration for the development and construction of the FOR RENT MULTI-FAMILY DEVELOPMENT by the DEVELOPER in the time and manner required herein, the CITY agrees to convey the fully improved multi-family lot(s) within the PROPERTY to the DEVELOPER for \$1.00. Additionally, the CITY agrees to a pay-go cash incentive to the DEVELOPER, which shall be calculated as Ninety Percent (90%) of the annual actual increment produced by tax revenue within the FOR RENT MULTI-FAMILY DEVELOPMENT for the first six (6) years, Eighty Percent (80%) of the same for the subsequent five (5) year period, and Seventy Percent (70%) of the same for the subsequent four (4) year period, or until such time that the total incentive of \$3,342,640.00 has been paid or the DISTRICT terminates under normal circumstances.

1.05 FINANCIAL INCENTIVE TO DEVELOPER FOR THE OWNER-OCCUPIED LOTS. In consideration for the development and construction of the OWNER-OCCUPIED DEVELOPMENT by the DEVELOPER in the time and manner required herein, the CITY agrees to convey fully improved lots within the PROPERTY to the DEVELOPER, such that DEVELOPER shall be able to connect to all PUBLIC IMPROVEMENTS without any expense. The DEVELOPER shall reimburse the CITY for each lot at the time that the building permit is issued for the lot in the amount of Eighteen Thousand Dollars (\$18,000.00) per unit. The DEVELOPER shall purchase lots to accommodate at least ten (10) residential owner-occupied units per year until all such lots have been purchased. The DEVELOPER guarantees that the owner-occupied units will create \$2,500,000 in assessed value in each year between 2027 and 2030, for a total of \$10,000,000 in assessed value.

1.06 GENERAL ADDITIONAL REQUIREMENTS. The CITY shall act upon the DEVELOPER submission of site plans for the PROPERTY and PRIVATE IMPROVEMENTS with all reasonable speed.

ARTICLE II - DEVELOPER OBLIGATIONS

2.01 PAYMENT. In consideration for the installation and maintenance of the PUBLIC IMPROVEMENTS identified in Article I, above, and Exhibit A, attached, DEVELOPER shall pay to CITY installment payments in the amount of Eighteen Thousand Dollars (\$18,000.00) per unit developed, to be paid at the time of the sale of the lot(s) for the OWNER-OCCUPIED DEVELOPMENT. The DEVELOPER and the CITY understand that the DEVELOPER may purchase multiple lots at one time.

2.02 DEVELOPMENT. The DEVELOPER agrees to proceed with the development of the PROPERTY and PRIVATE IMPROVEMENTS as outlined in Section 1.02 and the site plan.

2.03 GUARANTEE INCREMENT VALUE. Absent manifest error or mistake, the DEVELOPER agrees that the actual assessed value of the FOR RENT MULTI-FAMILY DEVELOPMENT will be Seven Million Dollars (\$7,000,000.00) for tax year 2025 and an additional Seven Million Dollars (\$7,000,000.00) for tax year 2026, for a total of Fourteen Million Dollars (\$14,000,000), which will be the guaranteed value for the MULTI-FAMILY

DEVELOPMENT throughout the life of the DISTRICT. The Developer further agrees that the actual assessed value for the OWNER-OCCUPIED DEVELOPMENT will be at least Two Million Five Hundred Thousand Dollars (\$2,500,000.00) for tax year 2027 and an additional Two Million Five Hundred Thousand Dollars (\$2,500,000.00) for every year thereafter through tax year 2030. If the assessed value does not meet the guaranteed increment value outlined in this section in any tax year, the CITY will not pay the financial incentive outlined in Section 1.04. Payments will be withheld to ensure that the CITY can pay the debt service on the PUBLIC IMPROVEMENTS provided as part of this PROJECT. The DEVELOPER will make timely property tax payments on an annual basis, and the CITY will make the annual incentive payment by September 15th of the year in which the property tax payment is made. The sample pro forma outlining the values and payments is included as Exhibit C. For example, if the 2028 property tax bill for the MULTI-FAMILY DEVELOPMENT is \$284,480 and the DEVELOPER pays that bill by January 31, 2029; then the CITY will make a \$256,032 payment to the DEVELOPER by September 15, 2029.

2.04 INSURANCE. DEVELOPER shall at its expense, obtain and carry comprehensive general liability insurance with combined single limits of at least One Million Dollars (\$1,000,000.00) for one person and at least Five Million Dollars (\$5,000,000.00) per occurrence, and at least One Million Dollars (\$1,000,000.00) property damage (or such higher amounts as the CITY shall from time to time deem reasonable). Such policy shall cover DEVELOPER and shall name as an additional insured the CITY and its agents, employees, and officials. A certificate of DEVELOPER'S insurance shall be furnished to the CITY upon execution of this Agreement naming the CITY as an additional insured, providing 30 days written notification of cancellation, naming the DEVELOPER'S insurance as Primary and Non-Contributory and waiving any rights of subrogation as to the CITY. Such policy shall provide that no act or default of any person including the CITY or its agents shall render the policy void as to the CITY or affect the CITY'S right to recover thereon. No work on the Project may begin until the insurance is provided to the CITY in the form as approved by the City Attorney.

ARTICLE III -PAYMENT OF FEES

3.01 IMPACT FEES. The CITY and DEVELOPER agree that the CITY does not have any utility or other impact fees, and as such, that the DEVELOPER shall not be responsible for any impact or connection fees as it relates to the PROPERTY, including any sewer and water connection fees; however, the DEVELOPER understands that DEVELOPER is obligated to connect the private infrastructure to the public infrastructure at DEVELOPER'S expense. The CITY shall be solely responsible for any impact or connection fees, if any. The DEVELOPER agrees to pay park impact fees as outlined in the annual Fee Schedule approved by the City Council in effect when this Agreement is executed, in installments to be paid at the time that the building permits are issued for each unit included in the OWNER-OCCUPIED DEVELOPMENT and the FOR RENT MULTI-FAMILY DEVELOPMENT. The DEVELOPER'S payment of park impact fees to the CITY will be for the purposes of the CITY installing and maintaining a park immediately adjacent to the PROPERTY with active amenities within 24 months of the installation of the relocated Banker Road, which is currently planned for construction in 2026. The CITY agrees to waive the requirements for the parkland dedication and payment in lieu of parkland dedication for the PROPERTY.

ARTICLE IV - SPECIAL PROVISIONS

4.01 WETLAND AND FLOODPLAIN CONDITIONS. It shall be an explicit condition that the PARTIES shall comply with all required regulations and shall obtain all necessary approvals in writing from the appropriate agencies relative to the wetlands and floodplain areas which may be on the PROPERTY, including a wetlands delineation report. The CITY shall be responsible for all costs associated with any report that may be required.

4.02 OTHER UTILITIES. The CITY and the DEVELOPER understand that the general Fort Atkinson area, including the PROPERTY, may experience insufficient capacity in the future for gas and electric utility service as a result of existing use and new development. Both the CITY and the DEVELOPER understand that certain gas and electric service utilities may require system upgrades to service the general Fort Atkinson area (including the PROPERTY). If utility service system upgrades are necessary for the development of improvements on any of the PROPERTY parcels, the CITY shall be solely responsible for the costs associated with any such utility service system upgrades.

ARTICLE V - INDEMNIFICATION

5.01 GENERAL INDEMNIFICATION. The DEVELOPER shall indemnify and hold the CITY harmless against and from any and all liability, judgments, costs and expenses incurred by the CITY as the result of any action by whomever or whenever brought or obtained against the CITY or the DEVELOPER, or both, which may in any manner result from or arise in the course of, out of, or as a result of the negligence of the DEVELOPER, its agents, contractors or employees (except to the extent caused by the negligence or willful misconduct of the CITY, its employees, agents or contractors), in connection with the DEVELOPER'S performance of this Agreement. The CITY shall indemnify and hold the DEVELOPER harmless against and from any and all liability, judgments, costs and expenses incurred by the DEVELOPER as the result of any action by whomever or whenever brought or obtained against the CITY or the DEVELOPER, or both, which may in any manner result from or arise in the course of, out of, or as a result of the negligence of the CITY, its agents, contractors or employees (except to the extent caused by the negligence or willful misconduct of the DEVELOPER, its employees, agents or contractors), in connection with the CITY'S performance of this Agreement.

5.02 INDEMNIFICATION FOR ENVIRONMENTAL CONTAMINATION. The CITY shall indemnify, and hold the DEVELOPER and its officers, agents and employees harmless from and against any and all losses, damages, costs, expenses, liabilities, obligations, claims or suits (including, without limitation, reasonable attorneys' fees, fines and penalties) resulting from or relating in any way to the presence of toxic or hazardous material or substances present in or on the real property dedicated or conveyed to the DEVELOPER, pursuant to, or in connection with this Agreement. For purposes of this Agreement, "toxic or hazardous material or substances" is defined as any pollutant, contaminant, waste or toxic or hazardous chemicals, wastes or substances, including, without limitation, asbestos, urea formaldehyde insulation, petroleum, PCBs, lead, air pollutants, water pollutants, soil pollutants and other substances defined as hazardous or toxic or

words of similar import under federal, state or local statute, rule, regulation or order of any government entity having jurisdiction over the control of such wastes or substances.

5.03 INDEMNIFICATION CLAIMS. Upon either the CITY or the DEVELOPER becoming aware of the occurrence of any event or the existence of any state of facts in respect of which such party has or will have a claim for indemnification under this Agreement (“Claim”), as soon as reasonably practicable thereafter:

a. The indemnified party shall provide the indemnifying party notice of the losses, damages, costs, expenses, liabilities, obligations, claims or suits (including, without limitation, reasonable attorney’s fees, punitive damages, fines, penalties, and consequential damages) as and when reasonably apprehended. Notwithstanding anything to the contrary contained herein, the indemnified party’s failure to timely notify the indemnifying party shall not prevent or in any way impair recovery by such party unless the indemnifying party is materially prejudiced as a result of such failure;

b. Subject to paragraphs (c) through (f) below, the indemnifying party diligently, at its own expense, shall control and shall be responsible for the defense, negotiation and/or settlement of the Claim, including the diligent performance of any remediation associated therewith;

c. The indemnified party may at its own expense hire counsel or consultants to monitor the Claim;

d. The indemnifying party shall not, without the prior written consent of the indemnified party, which consent shall not be unreasonably delayed, withheld or conditioned, settle any Claim;

e. The indemnifying party shall lose its right to defend, negotiate and settle any Claim if, in the reasonable judgment of the indemnified party, it fails to diligently defend, negotiate or settle such Claim. In the event that the indemnifying party has lost its right to defend, negotiate or settle any Claim: (i) the indemnified party shall have the right, without prejudice to its right of indemnification hereunder, at the indemnifying party’s cost and expense, to defend, negotiate and settle any Claim, and (ii) the indemnifying party shall pay such reasonable costs and expenses incurred by the indemnified party within twenty (20) days of receipt of written notice from the indemnified party;

f. If the indemnifying party does not timely assume responsibility for any Claim, the indemnified party shall have the right, without prejudice to its right of indemnification hereunder, at the sole cost and expense of the indemnifying party, to assume control of the defense, negotiation and/or settlement of the Claim, and may engage counsel or other agents, consultants, and contractors to contest, defend, settle or otherwise dispose of such Claim, including, without limitation, hiring any environmental consultant or contractor to perform any remediation necessary to address the Property or the toxic or hazardous materials or substances at the Property.

ARTICLE VI - DEFAULT

6.01 DEFAULT.

a. The occurrence of any one or more of the following events shall constitute a default by the DEVELOPER:

- (i) the DEVELOPER fails to pay any amounts when due under this Agreement and further fails to pay such amounts on or before fifteen (15) days following written notice of such failure; or
- (ii) the DEVELOPER materially breaches or fails to perform timely or observe timely any of its covenants or obligations under this Agreement (other than relating to the payment of money), and such failure shall continue for thirty (30) days following notice thereof from the CITY (or such longer period of time as is otherwise expressly set forth herein or as is reasonably necessary to cure the default as long as the DEVELOPER has commenced the cure of the default within the thirty (30) day period, is diligently pursuing the cure of the default and as long as the default is cured not later than one hundred twenty (120) days following the notice thereof from the CITY or such longer period of time as is reasonably agreed to by the CITY); or
- (iii) The DEVELOPER makes a general assignment for the benefit of creditors or to an agent authorized to liquidate any substantial amount of its assets; or
- (iv) The DEVELOPER becomes the subject of an “order for relief” within the meaning of the United States Bankruptcy Code, or files a petition in bankruptcy, for reorganization or to effect a plan or other arrangement with creditors; or
- (v) The DEVELOPER has a petition or application filed against it in bankruptcy or any similar proceeding, or has such a proceeding commenced against it and such petition, application or proceeding shall remain undismissed for a period of ninety (90) days or the DEVELOPER shall file an answer to such a petition or application, admitting the material allegations thereof; or
- (vi) The DEVELOPER applies to a court for the appointment of a receiver or custodian for any of its assets or properties, with or without consent, and such receiver shall not be discharged within ninety (90) days after his appointment; or
- (vii) The DEVELOPER adopts a plan of complete liquidation of its assets.

b. The occurrence of one or more of the following events shall constitute a default by the CITY:

- (i) The CITY fails to install the PUBLIC IMPROVEMENTS; or
- (ii) The CITY shall be deemed to be in default in the event it materially breaches or fails to perform timely or observe timely any of its covenants or obligations under this Agreement, and such failure shall continue for thirty (30) days following notice thereof from the DEVELOPER (or such longer period of time as is otherwise expressly set forth herein or as is reasonably necessary to cure the default as long as the CITY has commenced the cure of the default within the thirty (30) day period, is diligently pursuing the cure of the default and as long as the default is cured not later than one hundred twenty (120) days following the notice thereof from the DEVELOPER or such longer period of time as is reasonably agreed to by the DEVELOPER).

c. Upon the occurrence of any default by either party and following the notice requirements set forth above, without further demand or action of any kind by the non-defaulting party and except as expressly set forth below, the non-defaulting party may, at its option, pursue any or all rights and remedies available at law or in equity.

d. No remedy shall be exclusive of any other remedy and each and every remedy shall be cumulative and shall be in addition to every other remedy given under this Agreement, and/or now or hereafter existing at law or in equity. No failure or delay on the part of any party in exercising any right or remedy shall operate as a waiver thereof nor shall any single or partial exercise of any right preclude other or further exercise thereof or the exercise of any other right or remedy.

e. In the event of the default by either party, all reasonable fees, cost and expenses incurred by the non-defaulting party, including reasonable attorney's fees, in connection with the enforcement of this Agreement shall be paid by the defaulting party, including without limitation the enforcement of the non-defaulting party's rights in any bankruptcy, reorganization or insolvency proceeding.

6.02 FORCE MAJEURE. Notwithstanding anything herein to the contrary, in the event that the DEVELOPER is delayed or hindered in or prevented from the performance of any act required hereunder by reason of strikes, lockouts, labor troubles, inability to procure materials, failure of power, restrictive governmental regulations, orders or decrees, riots, insurrection, war, acts of God, inclement weather, or other reasons beyond the DEVELOPER'S reasonable control, then performance of such act shall be excused for the period of the delay and the period for the performance of any such act shall be extended for the period of such delay.

ARTICLE VII - NOTICES

All notices required or permitted by this Agreement shall be in writing and shall be deemed to have been given (i) upon delivery to an officer or designated representative of the person entitled to such notice, if hand delivered, or (ii) two business days following deposit in the United States mail, postage prepaid, or (iii) two business days following deposit with a nationally recognized overnight commercial carrier that will certify as to the date and time of delivery, or (iv) upon transmission if by facsimile or email, and each such communication or notice shall be addressed as follows, unless and until any of such parties notifies the other in accordance with this Article of a change of address:

If to the CITY:

City of Fort Atkinson
Attn: Rebecca Houseman
101 N. Main Street
Fort Atkinson, WI 53538

AND a copy to:

City Attorney David Westrick

Rogers & Westrick
93 N. Main Street
Fort Atkinson, WI 53538

If to DEVELOPER:

Intrepid Investments, LLC
Attn: Randy Schmiedel and Kraig Sadownikow
230 Ohio Street, Suite 200
Oshkosh, WI 54902

AND a copy to:

Schloemer Law Firm, S.C.
Attn: James Danaher and Jack Rettler
143 S. Main Street, Third Floor
West Bend, WI 53095

ARTICLE VIII – GENERAL PROVISIONS

8.01 ORDINANCES AND REGULATIONS. All provisions of the CITY’S zoning, subdivision, and platting code which are not inconsistent with or in conflict with any of the provisions of this Agreement are incorporated herein by reference and all such provisions shall bind the PARTIES hereto and be a part of this Agreement as fully as if set forth herein. In the event any provision set forth in this Agreement is in conflict with any provision set forth in any other CITY code or ordinance, this Agreement shall control.

8.02 ENTIRE AGREEMENT. This written Agreement and written amendments and any referenced attachments thereto shall constitute the entire agreement between the DEVELOPER and the CITY.

8.03 AMENDMENTS. This Agreement may be amended or modified only by an instrument in writing executed by all of the PARTIES to this Agreement.

8.04 AUTHORITY. The DEVELOPER, by the undersigned, represents, certifies and warrants that the undersigned has the authority to bind the DEVELOPER as an authorized officer of the same.

8.05 NO VESTED RIGHTS GRANTED. Except as expressly provided by law or as expressly provided by this Agreement, no vested rights in connection with this PROJECT shall inure to the DEVELOPER, its heirs, successors or assigns.

8.06 NO WAIVER. No waiver of any provision of this Agreement shall be deemed to constitute a waiver of any other provision, nor shall it be deemed or constitute a continuing waiver unless expressly provided for by a duly signed and executed, written amendment by all parties to

this Agreement. The CITY'S failure to act or exercise any right under this Agreement shall not constitute the approval or a waiver of its right to act or exercise any right under this Agreement or a ratification of any wrongful or negligent act by the DEVELOPER or the acceptance of any improvement or performance on the part of the DEVELOPER.

8.07 SEVERABILITY. If any part, term or provision of this Agreement is held by a court to be illegal or otherwise unenforceable, such illegality or unenforceability shall not affect the validity of any other part, term or provision; and the right of the PARTIES will be construed as if the part, term or provision was never part of the Agreement.

8.08 TERMINATION. This Agreement and all rights and obligations hereunder shall terminate upon the earlier to occur of (i) full performance by the DEVELOPER and the CITY of all of their respective obligations under this Agreement; and (ii) upon termination of the DISTRICT. Upon such termination, the PARTIES shall execute and record a termination of the Agreement.

8.09 TIME. Time is of the essence as to completion by the PARTIES of their respective obligations and is a critical component in success of the PROJECT and the DISTRICT.

The PARTIES agree that all actions, approvals, and consents required herein, shall be acted upon promptly and with diligence, and shall not be unreasonably withheld, conditioned, or delayed.

8.10 ASSIGNMENT. This Agreement may not be assigned by the DEVELOPER without the CITY's consent, which shall not be unreasonably withheld.

8.11 EFFECTIVE DATE. This Agreement shall be binding on the PARTIES as of the date written below.

[Signature Page Follows]

IN WITNESS WHEREOF, DEVELOPER, and the CITY have caused this Agreement to be signed in duplicate originals this ____ day of _____, 2024.

CITY OF FORT ATKINSON

Rebecca Houseman
City Manager

Date

Date approved by the City Council:

INTREPID INVESTMENTS, LLC

Randy Schmiedel, Authorized Member

Date

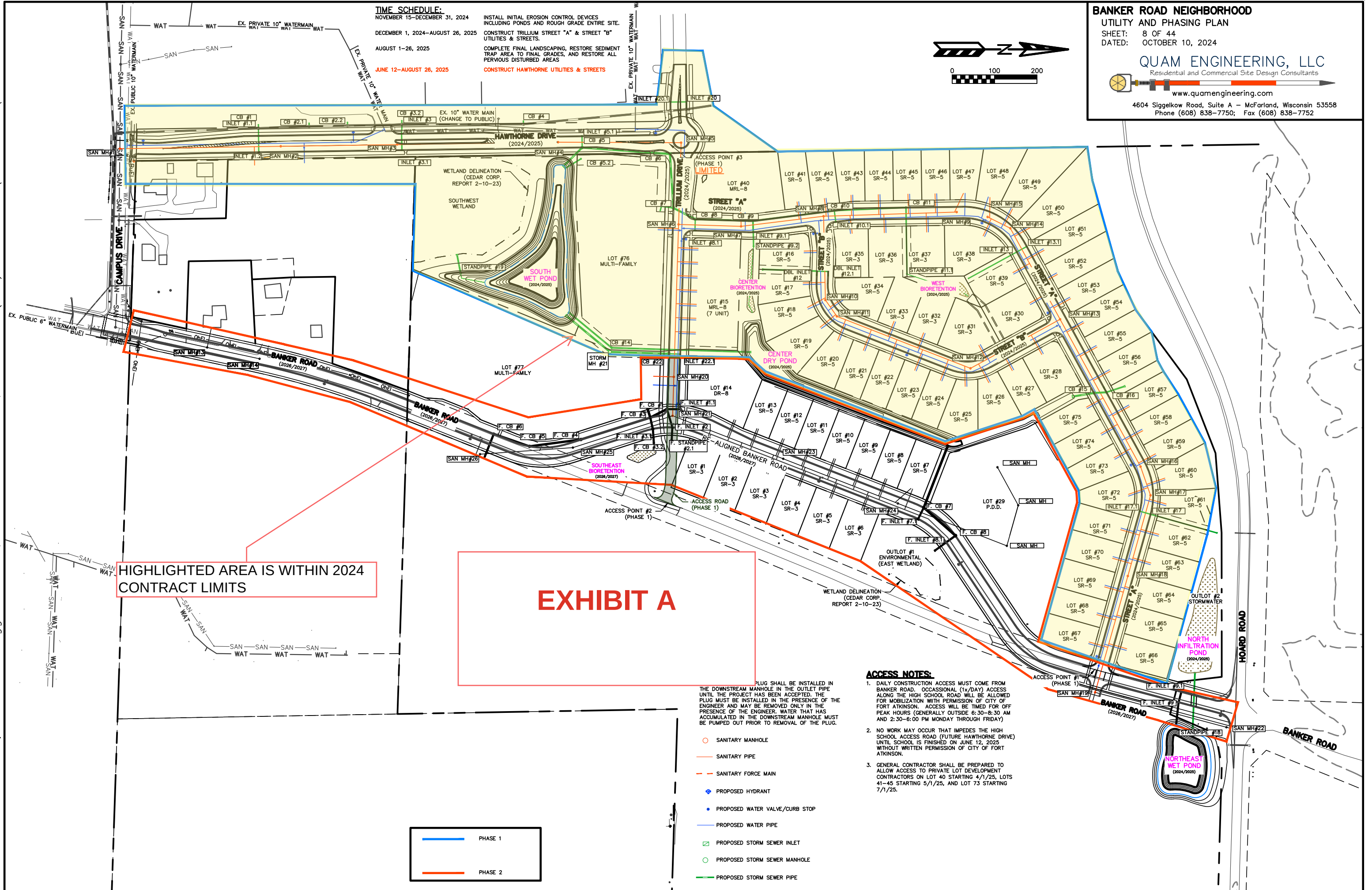
<u>TIME SCHEDULE:</u>	
NOVEMBER 15-DECEMBER 31, 2024	INSTALL INITIAL EROSION CONTROL DEVICES INCLUDING PONDS AND ROUGH GRADE ENTIRE SITE.
DECEMBER 1, 2024-AUGUST 26, 2025	CONSTRUCT TRILLIUM STREET "A" & STREET "B" UTILITIES & STREETS.
AUGUST 1-26, 2025	COMPLETE FINAL LANDSCAPING, RESTORE SEDIMENT TRAP AREA TO FINAL GRADES, AND RESTORE ALL FERVOUS DISTURBED AREAS
JUNE 12-AUGUST 26, 2025	CONSTRUCT HAWTHORNE UTILITIES & STREETS

BANKER ROAD NEIGHBORHOOD
UTILITY AND PHASING PLAN
SHEET: 8 OF 44
DATED: OCTOBER 10, 2024

QUAM ENGINEERING, LLC
Residential and Commercial Site Design Consultants

 www.quamengineering.com

4604 Siggelkow Road, Suite A – McFarland, Wisconsin 53558
Phone (608) 838-7750; Fax (608) 838-7752





Current Status 1% Inflation

City of Fort Atkinson
Tax Increment District No. 9
 Current Status 1% Inflation Model

Assumptions	
Annual Inflation During Life of TID.....	1.00%
2023 Gross Tax Rate (per \$1000 Equalized Value).....	\$20.32
Annual Adjustment to tax rate.....	0.00%
Investment rate.....	0.00%
Data above dashed line are actual	

Background Data					Revenues					Expenditures						TID Status					
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	(m)	(n)	(o)	(p)	(q)	(r)	(s)			
TIF District Valuation	Inflation Increment	Construction Increment	TIF Increment Over Base	Tax Rate	Tax Revenue	Advance Wastewater Utility	Advance from General Fund	Owner Occupied Lots	Total Revenues	Future Debt Service	Hypothetical Payment to Developers	Admin Expenses	Future Infrastructure Costs	Transfers to Adv Funds	Combined Expenditures	Annual Balance	Year End Cumulative Balance	Cost Recovery	Year		
(January 1)					(1)						(2)					(December 31)					
Base Value																					
\$23,689,600																					
\$23,689,600			\$1,133,200	\$20.32																	
\$24,822,800			\$1,133,200	\$20.32																	
\$24,822,800	\$248,228	\$7,000,000	\$8,381,428	\$20.32	\$0	\$1,000,000	\$625,000		\$1,625,000			\$15,000	\$1,625,000		\$1,640,000	(\$15,000)	(\$17,751)	2023 Audit	2023		
\$32,071,028	\$320,710	\$7,000,000	\$15,702,138	\$20.32	\$23,027			\$180,000	\$23,027			\$15,000			\$15,000	\$8,027	(\$32,751)		2024		
\$39,391,738	\$393,917	\$2,500,000	\$18,596,056	\$20.32	\$170,311			\$180,000	\$350,311	\$166,250	\$128,016	\$15,000			\$309,266	\$188,027	(\$24,724)		2025		
\$42,285,656	\$422,857	\$2,500,000	\$21,518,912	\$20.32	\$319,067			\$180,000	\$499,067	\$166,250	\$256,032	\$15,000			\$437,282	\$104,045	\$163,302		2026		
\$45,208,512	\$452,085	\$2,500,000	\$24,470,997	\$20.32	\$377,872			\$180,000	\$557,872	\$166,250	\$256,032	\$15,000			\$437,282	\$41,045	\$204,347		2027		
\$48,160,597	\$481,606	\$2,500,000	\$27,452,603	\$20.32	\$437,264			\$180,000	\$617,264	\$166,250	\$256,032	\$15,000			\$437,282	\$61,785	\$266,132		2028		
\$51,142,203	\$511,422		\$27,964,025	\$20.32	\$497,251			\$180,000	\$677,251	\$166,250	\$256,032	\$15,000		\$116,072	\$553,354	\$120,590	\$386,722		2029		
\$51,653,625	\$516,536		\$28,480,562	\$20.32	\$557,837			\$180,000	\$737,837	\$166,250	\$256,032	\$15,000		\$116,072	\$553,354	\$63,910	\$450,632		2030		
\$52,170,162	\$521,702		\$29,002,263	\$20.32	\$568,229			\$180,000	\$748,229	\$166,250	\$257,584	\$15,000		\$116,072	\$524,906	\$123,897	\$574,529		2031		
\$52,691,863	\$526,919		\$29,529,182	\$20.32	\$578,725			\$180,000	\$758,725	\$166,250	\$256,032	\$15,000		\$116,072	\$553,354	\$184,483	\$759,012		2032		
\$53,218,782	\$532,188		\$30,061,370	\$20.32	\$589,326			\$180,000	\$769,326	\$166,250	\$257,584	\$15,000		\$116,072	\$635,037	\$232,323	\$982,335		2033		
\$53,750,970	\$537,510		\$30,598,879	\$20.32	\$600,033			\$180,000	\$780,033	\$210,181	\$227,584	\$15,000		\$116,072	\$568,837	\$189,888	\$1,172,223		2034		
\$54,288,479	\$542,885		\$31,141,764	\$20.32	\$610,847			\$180,000	\$791,847	\$276,381	\$227,584	\$15,000		\$116,072	\$635,037	\$134,289	\$1,306,512		2035		
\$54,831,364	\$548,314		\$31,690,078	\$20.32	\$621,769			\$180,000	\$802,769	\$319,731	\$227,584	\$15,000		\$116,072	\$678,387	\$101,646	\$1,408,157		2036		
\$55,379,678	\$553,797		\$32,243,875	\$20.32	\$632,801			\$180,000	\$813,801	\$360,706	\$227,584	\$15,000		\$116,072	\$719,362	(\$108,515)	\$1,299,642		2037		
\$55,933,475	\$559,335		\$32,803,209	\$20.32	\$643,942			\$180,000	\$824,942	\$404,188	\$199,136	\$15,000		\$116,072	\$734,396	(\$112,626)	\$1,187,016		2038		
\$56,492,809	\$564,928		\$33,368,137	\$20.32	\$655,196			\$180,000	\$836,196	\$469,463	\$199,136	\$15,000		\$116,072	\$799,671	(\$166,870)	\$1,020,146		2039		
\$57,057,737	\$570,577		\$33,938,715	\$20.32	\$666,561			\$180,000	\$848,561	\$535,819	\$199,136	\$15,000		\$116,072	\$866,027	(\$222,084)	\$798,062		2040		
				\$20.32	\$678,041			\$180,000	\$859,041	\$598,138	\$199,136	\$15,000		\$116,072	\$928,346	(\$273,150)	\$524,912		2041		
					\$689,635			\$180,000	\$869,635	\$666,181		\$15,000		\$116,072	\$797,253	(\$30,692)	\$394,220		2042		
										\$788,288				\$116,064	\$904,352	(\$226,311)	\$167,909	Expenditures Recovered	2043		
															\$0	\$689,635	\$857,543	Expenditures Recovered	2044		
\$8,805,515					\$25,133,200					\$9,940,759	\$1,000,000	\$625,000	\$1,980,000	\$13,545,759	\$5,792,825	\$3,342,640	\$285,000	\$1,625,000	\$1,625,000	\$12,670,465	

(1) Increment per City Estimates.

(2) Hypothetical 90% PAYGO Payment 27-31, 80% 32-36, 70% 37-41

(3) Per City Estimate

City of Fort Atkinson

Tax Increment District No. 9

Multi-Family/Owner Occupied Development Profroma

Assumptions	
Annual Inflation During Life of TID.....	0.00%
2023 Gross Tax Rate (per \$1000 Equalized Value).....	\$20.32
Annual Adjustment to tax rate.....	0.00%
Investment rate.....	0.00%
Data above dashed line are actual	

Background Data					Revenues			Expenditures			TID Status			Year
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	(m)	(n)	
TIF District Valuation	Inflation Increment	Construction Increment	TIF Increment Over Base	Tax Rate	Tax Revenue	Owner Occupied Lots	Total Revenues	Future Debt Service	Hypothetical Payment to Developers	Combined Expenditures	Annual Balance	Year End Cumulative Balance	Cost Recovery	
(January 1)	(1)				(3)			(2)			(December 31)			
Base Value														
\$0														
2024	\$0	\$0	\$0	\$20.32	\$0		\$0			\$0	\$0	\$0		2024
2025	\$0	\$0	\$7,000,000	\$20.32	\$0		\$0			\$0	\$0	\$0		2025
2026	\$7,000,000	\$0	\$7,000,000	\$20.32	\$0	\$180,000	\$180,000			\$0	\$180,000	\$180,000		2026
2027	\$14,000,000	\$0	\$2,500,000	\$20.32	\$142,240	\$180,000	\$322,240		\$128,016	\$128,016	\$194,224	\$374,224		2027
2028	\$16,500,000	\$0	\$2,500,000	\$20.32	\$284,480	\$180,000	\$464,480		\$256,032	\$256,032	\$208,448	\$582,672		2028
2029	\$19,000,000	\$0	\$2,500,000	\$20.32	\$335,280	\$180,000	\$515,280		\$256,032	\$256,032	\$259,248	\$841,920		2029
2030	\$21,500,000	\$0	\$2,500,000	\$20.32	\$386,080	\$180,000	\$566,080		\$256,032	\$256,032	\$310,048	\$1,151,968		2030
2031	\$24,000,000	\$0		\$20.32	\$436,880	\$180,000	\$616,880		\$256,032	\$256,032	\$360,848	\$1,512,816		2031
2032	\$24,000,000	\$0		\$20.32	\$487,680	\$180,000	\$667,680		\$256,032	\$256,032	\$411,648	\$1,924,464		2032
2033	\$24,000,000	\$0		\$20.32	\$487,680	\$180,000	\$667,680		\$227,584	\$227,584	\$440,096	\$2,364,560		2033
2034	\$24,000,000	\$0		\$20.32	\$487,680	\$180,000	\$667,680		\$227,584	\$227,584	\$440,096	\$2,804,656		2034
2035	\$24,000,000	\$0		\$20.32	\$487,680	\$180,000	\$667,680		\$227,584	\$227,584	\$440,096	\$3,244,752		2035
2036	\$24,000,000	\$0		\$20.32	\$487,680	\$180,000	\$667,680		\$227,584	\$227,584	\$440,096	\$3,684,848		2036
2037	\$24,000,000	\$0		\$20.32	\$487,680		\$487,680		\$227,584	\$227,584	\$260,096	\$3,944,944	Expenditures Recovered	2037
2038	\$24,000,000	\$0		\$20.32	\$487,680		\$487,680		\$199,136	\$199,136	\$288,544	\$4,233,488	Expenditures Recovered	2038
2039	\$24,000,000	\$0		\$20.32	\$487,680		\$487,680		\$199,136	\$199,136	\$288,544	\$4,522,032	Expenditures Recovered	2039
2040	\$24,000,000	\$0		\$20.32	\$487,680		\$487,680		\$199,136	\$199,136	\$288,544	\$4,810,576	Expenditures Recovered	2040
2041	\$24,000,000	\$0		\$20.32	\$487,680		\$487,680		\$199,136	\$199,136	\$288,544	\$5,099,120	Expenditures Recovered	2041
2042	\$24,000,000	\$0		\$20.32	\$487,680		\$487,680			\$0	\$487,680	\$5,586,800	Expenditures Recovered	2042
2043				\$20.32	\$487,680		\$487,680			\$0	\$487,680	\$6,074,480	Expenditures Recovered	2043
2044					\$487,680		\$487,680			\$0	\$487,680	\$6,562,160	Expenditures Recovered	2044
					\$7,924,800	\$1,980,000	\$9,904,800	\$0	\$3,342,640	\$3,342,640				

Type of TID: Mixed-Use

2023 TID Inception (10/18/2022)

2038 Final Year to Incur TIF Related Costs

2043 Maximum Legal Life of TID (20 Years)

2044 Final Tax Collection Year

(1) Increment per City Estimates.

(2) Hypothetical 90% PAYGO Payment 27-31, 80% 32-36, 70% 37-41

(3) Per City Estimate

Multi-Family Development PAYGO

City of Fort Atkinson Tax Increment District No. 9 Multi-Family Development Profroma ONLY

Assumptions	
Annual Inflation During Life of TID.....	0.00%
2023 Gross Tax Rate (per \$1000 Equalized Value).....	\$20.32
Annual Adjustment to tax rate.....	0.00%
Investment rate.....	0.00%
Data above dashed line are actual	

Year	Background Data					Revenues		Expenditures			TID Status			Year
	(a)	(b)	(c)	(d)	(e)	(f)	(h)	(i)	(j)	(k)	(l)	(m)	(n)	
	TIF District Valuation (January 1)	Inflation Increment	Construction Increment (1)	TIF Increment Over Base	Tax Rate	Tax Revenue	Total Revenues	Future Debt Service	Hypothetical Payment to Developers (2)	Combined Expenditures	Annual Balance (December 31)	Year End Cumulative Balance	Cost Recovery	
	Base Value \$0													
2024	\$0	\$0		\$0	\$20.32	\$0	\$0			\$0	\$0	\$0		2024
2025	\$0	\$0	\$7,000,000	\$7,000,000	\$20.32	\$0	\$0			\$0	\$0	\$0		2025
2026	\$7,000,000	\$0	\$7,000,000	\$14,000,000	\$20.32	\$0	\$0			\$0	\$0	\$0		2026
2027	\$14,000,000	\$0		\$14,000,000	\$20.32	\$142,240	\$142,240		\$128,016	\$128,016	\$14,224	\$14,224		2027
2028	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$256,032	\$256,032	\$28,448	\$42,672		2028
2029	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$256,032	\$256,032	\$28,448	\$71,120		2029
2030	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$256,032	\$256,032	\$28,448	\$99,568		2030
2031	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$256,032	\$256,032	\$28,448	\$128,016		2031
2032	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$256,032	\$256,032	\$28,448	\$156,464		2032
2033	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$227,584	\$227,584	\$56,896	\$213,360		2033
2034	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$227,584	\$227,584	\$56,896	\$270,256		2034
2035	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$227,584	\$227,584	\$56,896	\$327,152		2035
2036	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$227,584	\$227,584	\$56,896	\$384,048		2036
2037	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$227,584	\$227,584	\$56,896	\$440,944		2037
2038	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$199,136	\$199,136	\$85,344	\$526,288		2038
2039	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$199,136	\$199,136	\$85,344	\$611,632		2039
2040	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$199,136	\$199,136	\$85,344	\$696,976		2040
2041	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480		\$199,136	\$199,136	\$85,344	\$782,320		2041
2042	\$14,000,000	\$0		\$14,000,000	\$20.32	\$284,480	\$284,480			\$0	\$284,480	\$1,066,800	Expenditures Recovered	2042
2043					\$20.32	\$284,480	\$284,480			\$0	\$284,480	\$1,351,280	Expenditures Recovered	2043
2044						\$284,480	\$284,480			\$0	\$284,480	\$1,635,760	Expenditures Recovered	2044
						\$4,978,400	\$4,978,400	\$0	\$3,342,640	\$3,342,640				

Type of TID: Mixed-Use

2023 TID Inception (10/18/2022)
2038 Final Year to Incur TIF Related Costs
2043 Maximum Legal Life of TID (20 Years)
2044 Final Tax Collection Year

(1) Increment per City Estimates.
(2) Hypothetical 90% PAYGO Payment 27-31, 80% 32-36, 70% 37-41
(3) Per City Estimate



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to proposals for recruitment services for the Public Works Director position (Houseman, City Manager)

BACKGROUND

At the November 19, 2024 City Council meeting, the Council authorized the City Manager to release a request for proposals (RFP) for recruitment services for the Public Works Director position. Andy Selle, the City's Public Works Director, submitted his letter of resignation earlier in November. His last day in the office will be December 18th, and his last day with the City as a regular employee will be January 15, 2025. The deadline for proposals for recruitment services to fill this position was December 11th, and the City received 9 proposals.

DISCUSSION

Staff reviewed all proposals using cost, process, timeline, additional materials submitted, and recruitment guarantees as criteria. In addition to those criteria, staff reviewed each firm's experience with the public sector, within the field of public works, and within the Wisconsin and/or Midwest network. The top four proposals are included in this packet for review by the City Council. The remaining four proposals are included in the summary table and are available for review upon request.

Staff prepared a summary table after reviewing all nine proposals, which is attached to this memo for review. The top four proposals were from McMahon, Government Professional Solutions (GPS), Public Administration Associates LLC (PAA), and MGT Impact Solutions, LLC (formerly GovHR). These are attached for review. All four proposals included a solid outline of a recruitment process, but included enough flexibility to meet the needs of the City. All four firms included sample documents as requested through the RFP. Such sample recruitment brochures, candidate profiles, and reports would meet the needs of the City for this recruitment process. The timeline included for all four processes are similar and realistic at 3-4 months. Staff notes that the upcoming holiday season may delay an initial kick-off meeting into 2025.

McMahon and GPS did not include recruitment guarantees in their proposals. PAA and MGT both commit to running another recruitment if the hired candidate leaves the position within 12 months of the date of hire. Staff followed up with both McMahon and GPS to inquire about

a recruitment guarantee. A representative from GPS indicated that they provide an 18-month recruitment guarantee. McMahon had not responded by the time of publication.

The cost of the top four proposals range from \$13,400 (PAA) to \$25,000 plus travel expenses (MGT), as can be seen on the attached summary table.

PAA is an experienced public sector recruiting firm based in Whitewater, Wisconsin. The firm features three partners with significant local government experience in Wisconsin, including general and public works administration. PAA has a long list of associates with various experience in local government, and the proposal indicates that President/Partner Kevin Brunner and Associate Bruce Stelzner would be assigned to this project. Note that both men have been public works directors in Wisconsin and have access to networks and organizations that will be helpful in recruiting a qualified candidate.

The PAA proposal does not include background checks or emotional intelligence assessments for the final candidate(s). Staff does not see this as a significant barrier. The City's Police Department can run a background check, and staff has utilized an independent source for emotional intelligence and/or leadership assessments in the past at very reasonable rates. If it is determined during the process that interview visits to a candidate's community are necessary or desirable, staff can work with PAA to determine an appropriate solution. PAA has worked in Fort Atkinson before, most recently in the 2021 recruitment of the City Manager. Their approach is flexible and cost-effective.

Staff checked several references for PAA that were included in the materials specifically for public works director positions within the last 2 years or so. Note that the market for public sector engineers, utility managers, and public works professionals has been extremely tight during this time. All reference checks came back positive while acknowledging the challenges and additional necessary compensation to fill these positions.

FINANCIAL ANALYSIS

This recruitment was unanticipated, and therefore not included in the 2024 or 2025 budget as a planned expense. However, there will be cost savings due to the departure of the Public Works Director (as of January 15, 2025), and the City Engineer position remains vacant. Staff proposes to split the cost of these recruitment services between the general fund and the water and sewer utilities in the following way:

Recruitment Proposal Funding Sources		
Account Description	Account #	Amount Allocated
ENG - Salaries	01-54-5421-0100	\$ 4,466.67
Water Admin Salaries	03-33-0092-0000	\$ 4,466.67
Sewer Eng Salaries	02-87-0875-0300	\$ 4,466.67
	Total	\$ 13,400.00

RECOMMENDATION

Staff recommends that the City Council accept the proposal from Public Administration Associates, LLC for recruitment services for the public works director position for \$13,400, and authorize the City Manager to execute the contract and begin the recruitment process.

ATTACHMENTS

1. Public Works Director Recruitment Proposal Evaluation
2. Fort Atkinson Executive Selection Proposal - McMahon 12.3.24
3. GPS Proposal - Fort Atkinson WI 12.5.24
4. PAA Proposal for COFA PWD Combined
5. MGT PROPOSAL_Fort Atkinson_Public Works Director
6. COFA Public Works Director RFP 11.20.24

City of Fort Atkinson Public Works Director Recruitment Proposals - Summary Table

Key	Recruitment Firm	Date Submitted	Firm Location	Cost	Invoices	Timeline	Additional Materials	Recruitment Guarantee	Notes
1	McMahon	12/3/2024	Neenah, WI	\$ 18,000.00	Time and expenses, not to exceed \$18k	3-4 Months	Sample agreement, sample recruitment brochure	No	Solid process; WI experience and references
2	Government Professional Solutions (GPS)	12/5/2024	Monument, CO	\$ 22,500.00	3 invoices	14 Weeks	Sample search report, sample recruitment brochure	Yes - 18 months (per email)	On-site meetings; member of APWA; limited WI experience; travel expenses for recruiter included (per email)
3	Public Administration Associates LLC (PAA)	12/10/2024	Whitewater, WI	\$ 13,400.00	3 invoices (33/33/34)	12-14 Weeks	Sample position profile, sample reference report	Yes - 12 months	WI firm with state-wide contacts; includes assessment center; 12-step process run by former PW Directors
4	MGT Impact Solutions, LLC	12/11/2024	Tampa, FL	\$ 25,000.00	3 invoices (40/40/20)	14 Weeks	Sample recruitment brochures, sample candidate portfolios	Yes - 12 months	Optional Community Survey \$2,500; Travel costs not included; Optional assessment center \$8,500; National firm w wide reach
5	Frontall Recruitment Agency	12/11/2024	Elizabeth, NJ	\$ 50,000.00	Cost is 15% of employee's negotiated salary plus expenses up to \$50k	12-15 days	None	Yes - 60-day replacement	No direct public sector experience; no connection to field or region; not customized; no sample work products
6	Gomez Partners	12/11/2024	Oak Brook, IL	\$ 22,000.00	3 invoices (33/33/34)	10 Weeks	Sample marketing materials for MTA	Yes - 12 months	Significant work with MTA, CHA; not customized to COFA or local government
7	Angels Recruiting Agency	12/11/2024	Victorville, CA	\$ 14,900.00	Not included	4+ Months	None	Yes - 90 days	Not customized to COFA; no sample work products
8	#twiceasnice Recruiting	12/11/2024	Boston, MA	\$ 15,000.00	3 invoices (33/33/34)	4+ Weeks	Sample recruitment brochures, sample recruiting agreement	Yes - 12 months	100% remote work; travel and background checks not included
9	TransPro Consulting, LLC	12/11/2024	Spring Hill, FL	\$ 30,000.00	4 invoices (30/30/30/10)	3-5 Months	None	Yes - 12 months	Experience placing transit executives; no specific public works recruitment experience; may be in person if requested; optional transition services

PROPOSAL

December 3,
2024

PUBLIC SAFETY & MUNICIPAL MANAGEMENT
PROFESSIONAL CONSULTING SERVICES

EXECUTIVE SELECTION SERVICES



FORT ATKINSON
JEFFERSON COUNTY, WI



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McMAHON
ENGINEERS ARCHITECTS

December 3, 2024



City of Fort Atkinson
Attention: Rebecca Houseman, City Manager
101 N. Main Street
Fort Atkinson, WI 53538

Dear Ms. Houseman,

We are pleased to submit a proposal for Executive Selection for the selection of a Public Works Director for the City of Fort Atkinson. Our teams' passion for Public Management and working with Municipal Officials provides the basis for our interest in submitting this proposal. The McMahon Associates, Inc. (McMahon) team of consultants will not only meet your expectations, but we also have extensive Executive Selection experience.

McMahon's Public Safety and Municipal Management Group has national and international public sector consulting experience. Most of our clients are public sector entities: municipalities, counties, tribes, or special districts. Our team of consultants are all senior level staff and are either current or former municipal management practitioners. An important component of our approach is frequent communication with the City Administration.

Our extensive operational and strategic experience in the public management area uniquely qualifies us for a project of this nature. The team has management, operational, technical, and consulting experience with all types of municipal and public management experience.

Thank you again for the opportunity to submit this proposal. If you have any questions or desire to schedule a meeting where we can present our proposal in more detail and answer any questions, please feel free to contact me at 920-875-0501 or by email at lgosz@mcmgrp.com. We look forward to working with you on this important project!

Respectfully,
McMahon Associates, Inc.



A handwritten signature in black ink, appearing to read "Lori Gosz".

Lori Gosz
SENIOR PUBLIC SAFETY SPECIALIST



A handwritten signature in black ink, appearing to read "Jeffrey R. Roemer".

Jeffrey R. Roemer
PUBLIC SAFETY MANAGER

JRR:kmh

EXECUTIVE SELECTION SERVICES PROPOSAL

QUALIFICATIONS

McMahon provides professional, high quality public management consulting, project management and other related services to organizations throughout the United States and abroad. Our consultants have served the needs of numerous municipalities throughout the United States and remain very active with several public safety and government related organizations including:

- Wisconsin City/County Management Association
- International City/County Management Association
- Wisconsin State Fire Chiefs Association
- International Association of Fire Chiefs
- International Association of Police Chiefs
- Association of Public Safety Communications Officials
- Paramedic Systems of Wisconsin
- National Emergency Number Association
- National Police Protection Association
- Wisconsin Society of Certified Public Managers
- Wisconsin State Police Chiefs Association
- Wisconsin Association of Public Safety Communications Officials

Our consultants possess in-depth knowledge of relevant aspects of public service, which includes administration, communications, organization, labor relations, human resources, economics, and standards. This knowledge allows us to provide clients with an intellectual and objective analysis of the information received. This information is then presented in an easily understood format, allowing policy boards to make knowledgeable and informed decisions.

Project progress is measured against an established work plan, timetables, budget, and list of deliverables. Project methodology includes frequently scheduled progress meetings to discuss progress as well as new or unanticipated issues. The work plans are focused, coordinated, and logical. Project team members are also available throughout the duration of the project.

METHODOLOGY

Our approach to this project requires a clear understanding of the current City of Fort Atkinson organization, staffing, operations, administration, planning, and related concerns. The key elements of our methodology include:

- A clear understanding of the project background, complex issues involved, and the goals and objectives.
- A work plan that is comprehensive, well designed, practical and provides for ample opportunity for client input.
- Sufficient resources and a commitment to successfully completing the project within the desired time frame and at a reasonable cost.

CLIENT INPUT

To complete a comprehensive Executive Selection Process and make specific recommendations, it is critical that we receive quality information from officials, staff, and members of the City of Fort Atkinson. Accordingly, our approach includes regular meetings with the Administration, along with associated agencies that would have valuable information to communicate to the Service.

PRACTICAL RECOMMENDATIONS

Our goal is to provide you with recommendations that can be used now, and in the future, to improve the efficiency and effectiveness of the City of Fort Atkinson during this transition. These recommendations need to be based on industry standards and legal considerations.

PROJECT MANAGEMENT

A successful assessment and the provision of effective recommendations requires a special effort to ensure that all levels of the project receive adequate attention, and those findings and recommendations are thoroughly coordinated. This is accomplished by the development and adherence to a project work plan, clear management team assignments and frequent communications with City Administration.

SCOPE OF WORK

Preliminary Planning and Development of Candidate Profile

- Meet with the City Manager to discuss our recruitment approach, strategy, and methodology. During this meeting we will also discuss salary, benefits, and other terms of employment so that we can be clear to potential candidates regarding the expectations of the Public Works Director.
- Interview the members of the City Council, Department Heads and other appropriate officials and staff for input on needed Public Works Director qualifications.
- Provide a questionnaire to be completed by elected officials, staff members and other potential stakeholders asking for their ranking of key management characteristics that will be used to develop the core position profile.
- Document and develop City's expectations for the position and characteristics deemed desirable in the candidate that will be necessary to continue to provide excellence in municipal services.
- Develop a candidate profile for the Public Works Director position and a community profile to attract top quality applicants.

Advertising/Candidate Search

- Develop the Public Works Director position advertisement based on the City's candidate profile.
- Recommend effective publications and announcement networks, avoiding those we have found costly and ineffective.
- Place advertisements to obtain national exposure for the position.
- Pursue potential candidates through firm resources and networks (i.e., websites inside and outside of Wisconsin, state, regional and national contacts we have developed over the years).

Resume Review

- Serve as the point of contact between candidates and the City Manager, answering candidate's questions and providing additional information to candidates.
- Review all resumes and match qualifications as indicated on resumes to the candidate profile and position requirements.
- Summarize applicant information in an easy-to-read format for the City Manager or Search Committee to review.

SCOPE OF WORK

PRE-QUALIFY CANDIDATES

- Facilitate a meeting with the City Manager or Search Committee to review and narrow the list of applicants to ten (10) maximum for personal contact (first cut).
- McMahon will conduct virtual/telephone interviews with the first cut applicants
- Based on the virtual/telephone interviews, we will develop a summary of first cut applicants for the City Manager or Search Committee review.
- We will facilitate a meeting with the City Manager or Search Committee to narrow the list of applicants to the top three to five (3 to 5) candidates (second cut) for further consideration.

PERSONAL INTERVIEWS

- We will provide the City Manager or Search Committee with a list of appropriate interview questions and conduct a brief interview training session to discuss those questions they can and cannot ask by law, to avoid any legal entanglements.
- Schedule interviews with candidates.
- Facilitate candidate interviews and make all necessary interview arrangements.
- Review interview results with the City Manager or Search Committee after the interviews are completed.
- Offer our professional observations and assist the City Manager in reaching a consensus on a finalist through a facilitated meeting process which is designed to identify the strengths, weaknesses, and cultural fit of the finalists.

PRE-EMPLOYMENT CHECKS OF FINALIST

- Verify past employment history.
- Obtain 3 - 5 professional references of finalist (our vast network of contacts in the municipal management profession frequently allows us to obtain references beyond that which is provided by the applicant).
- Verify academic credentials of finalist.
- Conduct a criminal, internet, and financial background check of the finalist.

SCOPE OF WORK

EMPLOYMENT CONTRACT NEGOTIATIONS

- Obtain authority from the City Manager on the acceptable range of salary, benefits, and other conditions of employment to offer to the finalist.
- Negotiate the employment agreement within the parameters established by the City Manager.
- Draft the formal employment agreement for consideration by the City Manager and applicant.

EMPLOYMENT TRANSITION

- We will meet with the current City Manager and City Council (separately if desired) to discuss immediate and on-going issues in which the City is involved.
- We will work with the Public Works Director finalist to ensure that he/she understands these issues and has a prioritized list that must be addressed to have a smooth transition.

PROJECT FEE / SCHEDULE

PROJECT FEE

McMahon Associates, Inc. proposes to provide the Scope of Services described in this Proposal for the Executive Search Services as follows:

Time and Expenses Estimated at \$15,000 to \$18,000 Not to Exceed \$18,000

The breakdown of McMahon hours for the various recruitment activities are based on estimates of what we know about the engagement at this time. Hours are flexible should circumstances require. The number of candidates in the pool will also have an impact on the consultant hours allocated for the project.

- Meetings to flesh out desired candidate qualifications and management qualities, conduct survey with City stakeholders, prepare Candidate and Community Profile.
- Develop advertisement, advertising plan and place advertisements.
- Candidate Outreach – in state. Includes developing written correspondence and phone calls to potential candidates.
- Applicant screening – review all resumes, contact candidates for clarification of information provided, check candidate resumes against desired qualifications and prepare candidate summary report to Search Committee.
- Phone/Skype and on-site interviews, both 1st and 2nd rounds, includes question development, Search Committee interview training, question/exercise preparation for each round, participation in the interviews and community meet and greet.
- Prepare and negotiate Conditional Offer of Employment, Employment Agreement preparation, attend Board meeting.

Upon acceptance of this Proposal, McMahon will prepare an Agreement incorporating the Scope of Services and terms outlined here. All services will be provided in accordance with our General Terms & Conditions, dated May 10, 2024, which are included in this proposal.

Invoices will be sent every month based on the previous months' time and expenses.

PROJECT SCHEDULE

McMahon has the staff available to begin this project immediately upon award. Based on our prior experience in projects like that requested in the RFP, an administrator recruitment of this nature typically will take 3 - 4 months to complete, plus any additional transition time needed for an individual to move to the area and begin employment.

Weeks	1-4	5-8	9-12	13-16
Preliminary Planning/Development of Candidate Profile				
Advertising/Candidate Search				
Resume Review				
Pre-Qualifying Candidates				
Personal Interviews				
Pre-Employment Checks of Finalists				
Employment Contract Negotiations				
Employment Transition				

McMAHON TEAM

Personnel assigned to this project are selected from McMahon Associates, Inc. (McMahon). The Project Manager supervises the Project Team and clerical personnel support the team. The combined resources ensure that the client receives the best possible combination of professional attention.

Lori M. Gosz – Senior Public Management Specialist

Lori will act as Project Manager and is a self-motivated, results driven professional with 25 years of municipal government experience in Northeast Wisconsin. A people, process and solution-oriented leader who appreciates the needs of the local government. Her focused experience is in human resource management, data research and analysis, operational and organisational studies, compliance to federal, state, and local regulations. She has worked successfully with the Wisconsin Department of Administration, Department of Natural Resources, and Department of Transportation on grant funding and administration of numerous projects.

Ed Henschel – Public Management Specialist

Ed will assist the Project Team and is a Public Management Specialist with 40 years of municipal management experience. Prior to joining McMahon, he served as a City Manager for 30+ years, serving municipalities in Wisconsin and Michigan. He was the Executive Director of the Wisconsin City/County Management Association for 10 years. He also has 20 years of municipal consulting experience conducting municipal recruitments, consolidation studies, department operation reviews, and labor negotiations. As a consultant, he has specialized in shared service and consolidation studies as well as management reviews for a wide range of municipal departments. In 2019 he published a book entitled Municipal Shared Service and Consolidation Handbook.

Ray C. Maurer – Public Management Specialist

Ray will assist the Project Team and is an experienced and dedicated municipal parks, recreation and forestry professional with over 30 years of experience. He is a Certified Park and Recreation Professional through the National Recreation and Park Association. He is responsible for the management and administration of the City of Oshkosh Parks Department which includes parks, landscape operations, aquatics, cemeteries, zoo, special events and Senior Services. His responsibilities also include administrative direction over full time staff, development of annual and capital improvement budgets, and development of short and long-term comprehensive plans. His strong relationship building skills were instrumental in developing many public/private partnerships that have resulted in cost-saving measures

The logo consists of a horizontal bar with a blue segment on the left and a green segment on the right.

McMAHON TEAM

throughout his career. He has the ability to connect with elected officials, citizens and others to build trust and establish lasting relationships. He has extensive experience in municipal parks, recreation and forestry operations, capital project management and process improvement.

Russ M. Van Gompel – Public Management Specialist

Russ will assist the Project Team and has over 39 years of experience in local governments serving in the States of Wisconsin and Minnesota. His experience includes working in the governments of large cities to smaller units of government and includes public cooperation agreements, public private partnerships and impact fee analysis and forecasting. Russ currently serves as the Finance Director for the City of Oshkosh.

Jeffrey R. Roemer – Public Safety Manager

Jeff manages the PS&MM Division and will be a major resource for the entire project. He has over 35 years of experience in public safety and is currently Public Safety Manager of the Public Safety & Municipal Management Group for McMahon. Jeff is a certified public manager and has been providing full-time public safety management consulting for the last 24 years. He worked as a Fire Chief, Police Chief, EMS Director, and Emergency Management Director before moving into public management consulting. He has worked with over 300 public safety clients nationwide and internationally.

REFERENCES

VILLAGE OF HARRISON

Interim Village Manager

Allison Blackmer, Village President

ablackmer@harrison-wi.org

920-808-1596

VILLAGE OF MOUNT PLEASANT

Executive Selection

Mary Cole, Human Resources Director

mcole@mtpleasantwi.gov

262-664-7837

VILLAGE OF BAYSIDE

Executive Selection and Management Counsel

Andy Pederson, Village Manager

apederson@baysidewi.gov

414-206-3925

CITY OF WEYAUWEGA

Executive Selection and Management Counsel

Rich Luedke, Mayor

rluedke@cityofweyauwega-wi.gov

920-284-0110

VILLAGE OF KIMBERLY

Executive Selection

Chuck Kuen, Village President

ckuen@valleymanagment.com

920-716-4502

VILLAGE OF PALMYRA

Executive Selection, Public Safety Director

Kathleen Weiss, Village President

villpres@vi.palmyra.wi.gov

262-495-8294

TOWN OF BUCHANAN

Executive Selection and Management Counsel

Karen Lawrence, Supervisor 1

Supervisor1@townofbuchanan.wi.gov

920-734-8599

CITY OF WAUPACA

Execute Selection and Management Counsel

Aaron Jenson, City Administrator

ajenson@cityofwaupaca.org

715-258-4411

CITY OF FORT ATKINSON
Attn: Rebecca Houseman, City Manager
101 N. Main Street
Fort Atkinson, WI 53538

DATE: December 3, 2024
McM. No.
EXECUTIVE SELECTION

PROJECT DESCRIPTION

McMahon Associates, Inc. will perform Executive Selection Services for the Public Works Director position for the City of Fort Atkinson according to the Scope of Services listed in this agreement.

SCOPE OF SERVICES

McMahon Associates, Inc. (McMahon) agrees to provide the following Scope of Services for this project:

Preliminary Planning and Development of Candidate Profile

- Meet with the City Manager to discuss our recruitment approach, strategy, and methodology. During this meeting we will also discuss salary, benefits, and other terms of employment so that we can be clear to potential candidates regarding the expectations of the Public Works Director.
- Interview the members of the City Council, Department Heads and other appropriate officials and staff for input on needed Public Works Director qualifications.
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Resume Review

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- Verify academic credentials of finalist.
- Conduct a criminal, internet, and financial background check of the finalist.

CLIENT RESPONSIBILITIES

The Scope of Services and fee is based upon the understanding that City of Fort Atkinson will provide the following:

- A single source contact with whom all communication is to occur.

SPECIAL TERMS (Refer also to General Terms & Conditions, attached)

The Client agrees that the Project Description, Scope of Services, and Compensation sections contained in this Agreement, pertaining to this project or any addendum thereto, are considered confidential and proprietary, and shall not be released or otherwise made available to any third party, prior to the execution of this Agreement, without the expressed written consent of McMahon.

COMPENSATION

McMahon agrees to provide the Scope of Services described above for the following compensation:

Time and Expenses Estimated at \$15,000 to \$18,000 Not to exceed \$18,000

COMPLETION SCHEDULE

McMahon agrees to complete this project as follows:
McMahon has the staff available to begin this project immediately upon award. Based on our prior experience in projects like that of Executive Selection recruitment of this nature typically will take 3 - 4 months to complete, plus any additional transition time needed for an individual to move to the area and begin employment.

ACCEPTANCE

The General Terms & Conditions and the Scope of Services (defined in the above Agreement) are accepted, and McMahon is hereby authorized to proceed with the services. The Agreement fee is firm for acceptance within sixty (60) days from the date of this Agreement.

CITY OF FORT ATKINSON

101 N. Main Street
Fort Atkinson, WI 53538

McMAHON ASSOCIATES, INC.

1445 McMahon Drive | PO Box 1025
Neenah, WI 54956 | 54957-1025
920.751.4200 | MGMGRP.COM

Authorized Signature

Jeffrey Roemer
Safety and Municipal Management Manager

Date

Date

Attachments: General Terms and Conditions
Fee Schedule
Reimbursable Schedule

1. STANDARD OF CARE

- 1.1 **Services:** McMahon Associates, Inc. (McMahon) shall perform services consistent with the professional skill and care ordinarily provided by engineers/architects practicing in the same or similar locality under the same or similar circumstances. McMahon shall provide its services as expeditiously as is consistent with such professional skill and care and the orderly progress of the Project.
- 1.2 **Client's Representative:** McMahon intends to serve as the Client's professional representative for those services, as defined in this Agreement, and to provide advice and consultation to the Client as a professional. Any opinions of probable project costs, approvals and other decisions made by McMahon for the Client are rendered based on experience and qualifications and represent our professional judgment. This Agreement does not create, nor does it intend to create a fiduciary relationship between the parties.
- 1.3 **Warranty, Guarantees, Terms and Conditions:** McMahon does not provide a warranty or guarantee, expressed or implied, for professional services. This Agreement or contract for services is not subject to the provisions of uniform commercial codes. Similarly, McMahon will not accept those terms and conditions offered by the Client in its purchase order, requisition or notice of authorization to proceed, except as set forth herein or expressly accepted in writing. Written acknowledgment of receipt, or the actual performance of services subsequent to receipt, of any such purchase order, requisition or notice of authorization to proceed is specifically deemed not to constitute acceptance of any terms or conditions contrary to those set forth herein.

2. PAYMENT AND COMPENSATION

- 2.1 **Invoices:** McMahon will bill the Client monthly with net payment due in 30-days. Past due balances shall be subject to an interest charge of 1.0% per month. Client is responsible for interest charges on past due invoices, collection agency fees and attorney fees incurred by McMahon to collect all monies due McMahon. Client is responsible for all taxes levied on professional services and on reimbursable expenses. McMahon and Client hereby acknowledge that McMahon has and may exercise lien rights on subject property.
- 2.2 **Reimbursables:** Expenses incurred by McMahon for the project including, but not limited to, equipment rental will be billed to the Client at cost plus 10% and sub-consultants at cost plus 12%. When McMahon, after execution of an Agreement, finds that specialized equipment must be purchased to provide special services, the cost of such equipment will be added to the agreed fee for professional services only after the Client has been notified and agrees to these costs.
- 2.3 **Changes:** The stated fees and Scope of Services constitute McMahon's professional opinion of probable cost of the fees and tasks required to perform the services as defined. For those projects involving conceptual or process development services, activities often cannot be fully defined during initial planning. As the project progresses, facts uncovered may reveal a change in direction, which may alter the Scope. Changes by the Client during design may necessitate re-design efforts. McMahon will promptly inform the Client in writing of such situations so changes in this Agreement can be negotiated, as required.
- 2.4 **Delays and Uncontrollable Forces:** Costs and schedule commitments shall be subject to re-negotiation for delays caused by the Client's failure to provide specified facilities or information, or for force majeure delays caused by unpredictable occurrences, including without limitation, fires, floods, riots, strikes, unavailability of labor or materials, delays or defaults by suppliers of materials or services, process shutdowns, infectious diseases or pandemics, acts of God or the public enemy, or acts or regulations of any governmental agency. Temporary delay of services caused by any of the above, which results in additional costs beyond those outlined, may require re-negotiation of this Agreement.

3. INSURANCE

- 3.1 **Limits:** McMahon will maintain insurance coverage in the following amounts:

Worker's Compensation	Statutory
General Liability	
Bodily Injury - Per Incident/Annual Aggregate	\$1,000,000 / \$2,000,000
Automobile Liability	
Bodily Injury	\$1,000,000
Property Damage	\$1,000,000
Professional Liability Coverage	\$2,000,000

If the Client requires coverage or limits in addition to the above stated amounts, premiums for additional insurance shall be paid by the Client.

McMahon's liability to Client for any indemnity commitments, reimbursement of legal fees, or for any damages arising in any way out of performance of our contract or based on tort, breach of contract, or any other theory, is limited to ten (10) times McMahon's fee not to exceed to \$250,000.

- 3.2 **Additional Insureds:** Upon request and to the extent permitted by law, McMahon shall cause the primary and excess or umbrella policies for Commercial General Liability and Automobile Liability to include the Client as an additional insured for claims caused in whole or in part by McMahon's negligent acts or omissions. The additional insured coverage shall be primary and non-contributory to any of the Client's insurance policies and shall apply to both ongoing and completed operations.

To the extent permitted by law, Client shall cause the contractor, if any, to include McMahon as an additional insured on contractor's Commercial General Liability, Automobile Liability and Excess or Umbrella policies to include McMahon as an additional insured for claims caused in whole or in part by contractor's negligent acts or omissions. The additional insured coverage shall be primary and non-contributory to any of McMahon's insurance policies and shall apply to both ongoing and completed operations.

4. CLAIMS AND DISPUTES

- 4.1 **General:** In the event of a dispute between the Client and McMahon arising out of or related to this Agreement, the aggrieved party shall notify the other party of the dispute within a reasonable time after such dispute arises. The Client and McMahon agree to first attempt to resolve the dispute by direct negotiation.
- 4.2 **Mediation:** If an agreement cannot be reached by the Client and McMahon unresolved disputes shall be submitted to mediation per the rules of the American Arbitration Association. The Client and McMahon shall share the mediator's fee and any filing fees equally.
- 4.3 **Binding Dispute Resolution:** If the parties do not resolve a dispute through mediation the method of binding dispute resolution shall be litigation in a court of competent jurisdiction.

5. TERMINATION OR SUSPENSION

- 5.1 Client: Termination of this Agreement by the Client shall be effective upon seven (7) day written notice to McMahon. The written notice shall include the reasons and details for termination; payment is due as stated in above Section 2.
- 5.2 McMahon: If the Client defaults in any of the Agreements entered into between McMahon and the Client, or if the Client fails to carry out any of the duties contained in these Terms & Conditions, McMahon may, upon seven (7) days written notice, suspend its services without further obligation or liability to the Client unless, within such seven (7) day period, the Client remedies such violation to the reasonable satisfaction of McMahon.
- 5.3 Suspension for Non-Payment: McMahon may, after giving 48-hours' notice, suspend service under any Agreement until the Client has paid in full all amounts due for services rendered and expenses incurred.

6. COPYRIGHTS AND LICENSES

- 6.1 Instruments of Service: McMahon and its subconsultants shall be deemed the author and owner of their respective Instruments of Service (IOS), including the Drawings, Specifications, reports, and any computer modeling (BIM, etc.), and shall retain all common law, statutory and other reserved rights, including copyrights.
- 6.2 Licenses: McMahon grants to the Client a nonexclusive license to use McMahons' IOS solely and exclusively for the purposes of constructing, using, and maintaining the project, provided that the Client substantially performs its obligations under this Agreement, including prompt payment of all sums due.
- 6.3 Re-use: Use of IOS pertaining to this project by the Client for extensions of this project or on any other project shall be at the Client's sole risk and the Client agrees to defend, indemnify, and hold harmless McMahon from all claims, damages and expenses, including attorneys' fees arising out of such re-use of the IOS by the Client or by others acting through the Client.

7. AGREEMENT CONDITIONS

- 7.1 The stipulated fee is firm for acceptance by the Client within 60-days from date of Agreement publication.
- 7.2 Modifications: This Agreement, upon execution by both parties hereto, can be amended only by written instrument signed by both parties.
- 7.3 Governing Law: This Agreement shall be governed by the law of the place where the project is located, excluding that jurisdiction's choice of law rules.
- 7.4 Mutual Non-Assignment: The Client and McMahon, respectively bind themselves, their agents, successors, assigns and legal representatives to this Agreement. Neither the Client nor McMahon shall assign this Agreement without the written consent of the other.
- 7.5 Severability: The invalidity of any provision of this Agreement shall not invalidate the Agreement or its remaining provisions. If it is determined that any provision of the Agreement violates any law, or is otherwise invalid or unenforceable, then that provision shall be revised to the extent necessary to make that provision legal and enforceable. In such case the Agreement shall be construed, to the fullest extent permitted by law, to give effect to the parties' intentions and purposes in executing the Agreement.
- 7.6 Third Party: Nothing contained in this Agreement shall create a contractual relationship with, or a cause of action, in favor of a third party against McMahon.

8. MISCELLANEOUS PROVISIONS

- 8.1 Additional Client Services: The Client agrees to provide such legal, accounting and insurance counseling services as may be required for the project for the Client's purpose.
- 8.2 Means and Methods: McMahon is not responsible for direction or supervision of construction means, methods, techniques, sequence, or procedures of construction selected by contractors or subcontractors, or the safety precautions and programs incident to the work of the contractors or subcontractors.
- 8.3 Purchase Orders: In the event the Client issues a purchase order or other instrument related to McMahon's services, it is understood and agreed that such document is for Client's internal accounting purposes only and shall in no way modify, add to, or delete any of the terms and conditions of this Agreement. If the Client does issue a purchase order, or other similar instrument, it is understood and agreed that McMahon shall indicate the purchase order number on the invoice(s) sent to the Client.
- 8.4 Project Maintenance: The Client (or Owner if applicable) shall be responsible for maintenance of the structure, or portions of the structure, which have been completed and have been accepted for its intended use. All structures are subject to wear and tear, and environmental and man-made exposures. As a result, all structures require regular and frequent monitoring and maintenance to prevent damage and deterioration. Such monitoring and maintenance is the sole responsibility of the Client or Owner. McMahon shall have no responsibility for such issues or resulting damages.
- 8.5 Consequential Damages: Notwithstanding any other provision of the Agreement, neither party shall be liable to the other for any consequential damages incurred due to the fault of the other party, regardless of the nature of this fault or whether it was committed by the Client or the Design Professional, their employees, agents, subconsultants or subcontractors. Consequential damages include, but are not limited to, loss of use and loss of profit.
- 8.6 Corporate Protection: It is intended by the parties to this Agreement that McMahon's services in connection with the project shall not subject McMahon's individual employees, officers, or directors to any personal legal exposure for the risks associated with this project. Therefore, and notwithstanding anything to the contrary contained herein, the Client agrees that as the Client's sole and exclusive remedy, any claim, demand, or suit shall be directed and/or asserted only against McMahon, a Wisconsin corporation, and not against any of McMahon's employees, officers, or directors.
- 8.7 Contingency: McMahon's professional services are not a warranty or guarantee. The project will evolve and be refined over time. The Client shall provide appropriate contingency for design and construction costs consistent with the reasonable progression of the project. The Client and McMahon agree that revisions due to design clarifications or omissions which result in changes in work during the construction phase which amount to 5% or less of construction costs shall be deemed within the contingency and consistent with the professional standard of care. The Client agrees to make no claim for costs related to changes in work within this threshold. Claims in excess of this threshold shall be resolved per the dispute resolution process.
- 8.8 Project Costs Associated with Agency Plan Review: McMahon will not be responsible for additional project costs due to changes to the design, construction documents, and specifications resulting from the agency plan review process. The project schedule shall either allow for the agency plan review process to occur prior to the Bid Phase or if this review occurs after the Bid Phase the Client agrees that any additional costs would be considered part of the project contingency.
- 8.9 Hazardous Materials: McMahon shall have no responsibility for the discovery, presence, handling, removal, or disposal of, or exposure of person to, hazardous materials or toxic substance in any form at the project site.
- 8.10 Climate: Design standards which exceed the minimum requirements within current codes and regulations are excluded. If requested by the Client, climate-related design services or evaluations can be provided for additional compensation.

FEE SCHEDULE | 2024

McMahon Associates, Inc.

Effective: 01/01/2024 Revised: 09/11/2024

LABOR CLASSIFICATION	HOURLY RATE
Principal	\$205.00
Senior Project Manager	\$205.00
Project Manager	\$145.00 - \$195.00
Senior Engineer	\$185.00 - \$195.00
Engineer	\$105.00 - \$175.00
Senior Engineering Technician	\$135.00 - \$145.00
Engineering Technician	\$75.00 - \$125.00
Senior Architect	\$170.00 - \$190.00
Architect	\$145.00 - \$165.00
Senior Designer	\$120.00 - \$140.00
Designer	\$90.00 - \$110.00
Senior Land Surveyor	\$130.00 - \$170.00
Land Surveyor	\$120.00
Land Surveyor Technician	\$85.00 - \$105.00
Surveyor Apprentice	\$70.00
Erosion Control Technician	\$90.00
Senior Hydrogeologist	\$205.00
Senior Ecologist	\$195.00
Environmental Scientist	\$100.00 - \$115.00
Senior G.I.S. Analyst	\$170.00
G.I.S. Analyst	\$95.00 - \$115.00
Wetland Delineator	\$115.00
Senior Wetland Delineator	\$140.00
Municipal Planner	\$165.00
Senior Public Management Specialist	\$160.00
Public Management Specialist	\$130.00
Senior Public Safety Specialist	\$160.00
Public Safety Specialist	\$130.00
Building Inspector Specialist	\$130.00
Water / Wastewater Specialist	\$105.00 - \$135.00
Senior On-Site Project Representative	\$120.00
On-Site Project Representative	\$60.00 - \$105.00
K-12 Administrative Specialist	\$125.00
State Plan Reviewer	\$145.00
Certified Grant Specialist	\$145.00
Graphic Designer	\$110.00
Senior Administrative Assistant	\$95.00 - \$105.00
Administrative Assistant	\$85.00
Intern	\$45.00 - \$70.00
Professional Witness Services	\$370.00

This Fee Schedule is subject to revisions due to labor rate adjustments and interim staff or corporate changes.

NEENAH, WISCONSIN CORPORATE HEADQUARTERS

Street Address:
1445 McMAHON DRIVE
NEENAH, WI 54956
Mailing Address:
P.O. BOX 1025
NEENAH, WI 54957-1025
Ph 920.751.4200 | Fax 920.751.4284
Email: MCM@MCMGRP.COM
Web: WWW.MCMGRP.COM

1700 HUTCHINS ROAD
MACHESNEY PARK, IL 61115
Ph 815.636.9590 | Fax 815.636.9591
Email: McMAHON@MCMGRP.NET
Web: WWW.MCMGRP.COM

952 SOUTH STATE ROAD 2
VALPARAISO, IN 46385
Ph 219.462.7743 | Fax 219.464.8248
Email: MCM@MCMGRP-IN.COM
Web: WWW.MCMGRP.COM

REIMBURSABLE EXPENSE SCHEDULE * | 2024

McMahon Associates, Inc.

Effective: 01/01/2024

DESCRIPTION	RATE
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REIMBURSABLE EXPENSES:

Commercial Travel	1.1 of Cost
Delivery & Shipping	1.1 of Cost
Meals & Lodging	1.1 of Cost
Review & Submittal Fees	1.1 of Cost
Outside Consultants	1.12 of Cost
Photographs & Models	1.1 of Cost
Misc. Reimbursable Expenses & Project Supplies	1.1 of Cost
Terrestrial Laser Scanner	\$1,500.00

REIMBURSABLE UNITS:

Copy Charges - Black & White	\$0.08/Image
Copy Charges - Color / 8½" x 11"	\$0.45/Image
Copy Charges - Color / 8½" x 14" and 11" x 17"	\$0.75/Image
Mileage	\$0.75/Mile
Mileage - Truck/Van	\$1.05/Mile
All-Terrain Vehicle	\$100.00/Day
Global Positioning System (GPS)	\$21.00/Hour
Hand-Held Global Positioning System (GPS)	\$15.00/Hour
Robotic Total Station	\$20.00/Hour
Survey Hubs	\$0.45/Each
Survey Lath	\$0.80/Each
Survey Paint	\$6.00/Can
Survey Ribbon	\$3.00/Roll
Survey Rebars - 1¼"	\$10.00/Each
Survey Rebars - ¾"	\$3.50/Each
Survey Rebars - 5/8"	\$3.00/Each
Survey Iron Pipe - 1"	\$4.50/Each
Survey Steel Fence Post - 1"	\$7.75/Each
Control Spikes	\$1.75/Each

NEENAH, WISCONSIN
CORPORATE HEADQUARTERS

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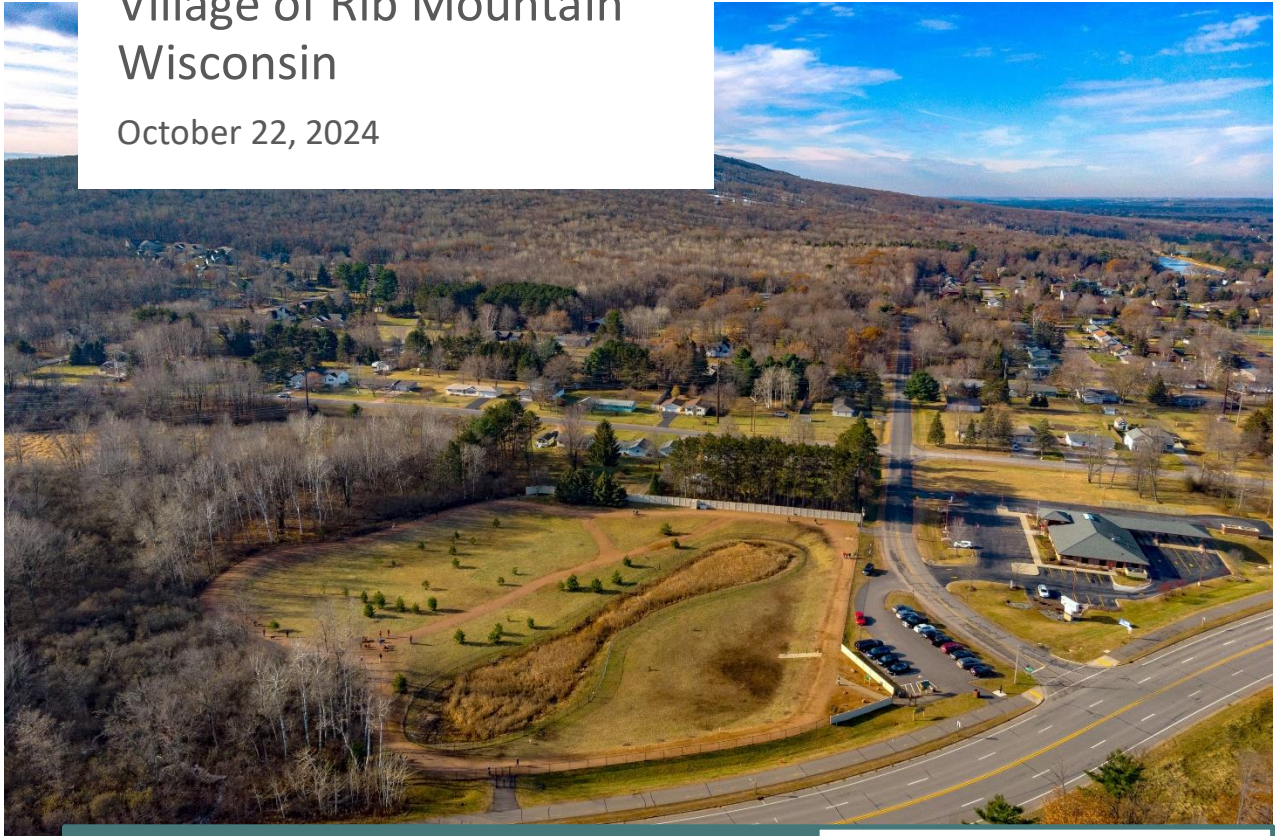
1700 HUTCHINS ROAD
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Email: MCMAHON@MCMGRP.NET
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* This schedule is not all inclusive.

Village of Rib Mountain Wisconsin

October 22, 2024



Street & Park Superintendent



The Village of Rib Mountain is seeking a dynamic candidate who demonstrates strong leadership and supervisory skills for its next Street & Park Superintendent.

WHO WE ARE

The Village of Rib Mountain (pop. 7,313) is located in Central Wisconsin in the heart of Marathon County, at the crossroads of Interstate 39, State Highway 51 and State Highway 29 East/West interchanges. The Village of Rib Mountain anchors the Southwest corner of the Wausau Standard Metropolitan Statistical Area. The Village's economy is dominated by commercial and service type businesses, most of which are located near Rib Mountain Drive which serves as the community's Main Street, the largest retail center in Northcentral Wisconsin. Rib Mountain offers residential, commercial, and recreational opportunities. The following is a video of which illustrates who we are <https://youtu.be/5opmQzeluo8?si=KV21tWPDxFdch5E0>.

OUR HISTORY

The Town of Rib Mountain was originally part of the Town of Weston. In 1905, the area west of the Wisconsin River was separated and initially renamed Erickson (after the Town Chairman), but soon renamed Flieth. The name was changed to Rib Mountain in 1930. The Town of Rib Mountain experienced fairly strong population growth, with an increase in population of 45% between 1970 and 2000. In June 2021, the Town of Rib Mountain Board of Supervisors held an informational meeting on incorporation. As a result of the meeting, residents formed an incorporation committee and circulated a petition to incorporate the entire Town. On July 11, 2023, Town of Rib Mountain became the Village of Rib Mountain.

OUR LOCAL GOVERNMENT

The Village of Rib Mountain operates under a Village Board-Village President form of government which consists of the Village President and four Village Trustees, whom all are elected at large. There are several appointed officials including the Village Administrator, Director of Community Development, Clerk, Finance Director, Water Utility Director, and Street & Park Superintendent. Village Committees include the Finance & Economic Committee, Public Safety Committee, Public Works Committee, and Pedestrian & Bicycle Safety Committee (a sub-Committee of the Public Safety Committee). Commissions include the Park Commission, Plan Commission, and Tourism Commission.

THE POSITION

The Street & Park Superintendent position is a management position responsible for planning, organizing, coordinating, and directing the operations and activities of the Public Works Department, including building maintenance, environmental, recycling, refuse, storm sewer, street, parks, and other public works projects and programs. This supervisory role is responsible for managing approximately 70 miles of roadway, six parks, and several miles of trails. The work is performed under the direction of the Village Administrator.

MANAGEMENT STYLE & ATTRIBUTES

The ideal candidate will be an effective leader who motivates others, possesses strong project management and organizational skills, displays a positive personality, strong personnel management skills, excellent verbal communication and problem solving, is a team player who exemplifies positive relationships with Department Heads, Village employees, and elected officials, and is knowledgeable in department budgeting.

EDUCATION AND EXPERIENCE

A degree in civil engineering or related field with a minimum of five years progressively responsible for public works experience, or any combination of education and experience that provides equivalent knowledge, skills, and abilities. Management skills preferred. Professional Engineering License highly desired. Must possess a valid Wisconsin Driver's License.

COMPENSATION AND BENEFITS

This position is posted with a competitive salary range of \$ 88,379 - \$106,059 with a comprehensive benefits package, including participation in the Wisconsin Retirement System, as well as health, disability, and life insurance benefits. Starting salary will be DOQ.

APPLICATION PROCESS

Interested professionals should submit application material to khackbarth@mcmgrp.com at McMahon Associates, Inc.

During the application period, interested professionals should submit the following:

- ✓ Cover Letter
- ✓ Resume
- ✓ Professional References

Qualified candidates should apply by **Friday, November 15, 2024** (open until filled) with complete application materials. All questions should be directed to Lori Gosz, McMahon Senior Public Management Specialist who can be reached by email at lgosz@mcmgrp.com.

Additional information about the Village of Rib mountain can be found on the Village website:

<https://www.ribmountainwi.gov/>

The Village of Rib mountain is an equal opportunity employer

MORE ABOUT THE COMMUNITY OF RIB MOUNTAIN...

EDUCATION

Rib Mountain is part of the Wausau School District which serves over 7,500 students 4K-Grade 12. The district offers twenty schools within 258 square miles which includes two high schools, two middle schools (grades 6, 7, and 8), thirteen elementary schools (grades K-5), two charter schools, and one virtual school.

RECREATION

Rib Mountain offers great access to the outdoors with many miles of bike trails, pedestrian trails, and Village-operated parks alongside County parks and Rib Mountain State Park. Village parks include Chellis Park, Doepeke Recreation Area, Flax Lane Tot Lot, Liberty Park, Rookery View Park, and Sandy's Bark Park. The Village recently held a Food Truck Night at Doepeke Park. The following is a video on the event. <https://youtu.be/MqP4A-9vg08?si=Lj7a-d8vXLyvuX2z>

Other area parks include the well-known Rib Mountain State Park, Granite Peak Ski Area, Nine Mile County Forest, Bluegill Bay County Park.



PUBLIC WORKS

The Village Public Works Department is responsible for maintaining the stormwater system, the streets, and the parks in our community. The department maintains nearly 80 lane miles within the Village. The department has seven (7) full-time employees which includes the Superintendent, Forman, Operator/PW Technician, Mechanic, and three (3) Operators. The department also has several seasonal employees which include Yard Waste Attendant, Landscape Maintenance, Recreation Director, Co-Activity Directors (3), Rink Maintenance, Rink Attendant, Summer/Seasonal Public Workers (mowers), and Winter Call-In Operators for snowplowing and trail maintenance.

PUBLIC SAFETY

SAFER (South Area Fire/EMS Response) provides Fire and/or EMS and rescue operations to the Village of Rib Mountain, Village of Weston, Town of Weston, Village of Kronenwetter and the Towns of Easton, Ringle, Guenther, Stettin, and Marathon.

The Village contracts with Marathon County for law enforcement services with two Sheriff Deputies assigned to Rib Mountain.



Proposal to provide Professional Executive Search Services for the Public Works Director Position



DECEMBER 5, 2024

Provided to Rebecca Houseman, City Manager of the City of Fort Atkinson, WI
By Government Professional Solutions (GPS)



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December 5, 2024

Rebecca Houseman
City Manager
101 N. Main St.
Fort Atkinson, WI 53538



Dear Rebecca Houseman,

Government Professional Solutions, LLC (GPS), welcomes the opportunity to submit our proposal for executive search services to help the City of Fort Atkinson find and hire the best candidate to serve as its next Public Works Director.

GPS offers you a distinct alternative to the traditional executive search firm. We are a government consultancy comprised of only senior level, former city managers with MPA degrees. Our services are based on best practices built from a combined 30+ years of experience in the public sector and city management. Our firm philosophy is rooted in the highest ethics and integrity, and relationships are at the core of everything we do.

We believe, and hope you will agree, that we are the best partner to guide you through this very important executive search process for several reasons:



Our ability to leverage an extensive network of public officials across the U.S. Throughout our decades of public service, we have developed and continue to grow long-lasting relationships with countless public executives, managers, and staff.



Our insight into what it takes to be successful in the Public Sector. As former city managers, we are very familiar with the types of discussions to have and questions to ask of candidates as we have been in those positions ourselves and tackled the same types of opportunities and challenges they most likely will face.



Our commitment to giving you customized and personal service of the highest quality. GPS Partner, Chris Lowe, will be the only consultant working on this project and will work closely with you to customize a search approach that best serves your specific objectives. This means you know exactly who you are working with from start to finish, that you can count on receiving senior level expertise, and that the process will be seamless.

Chris Lowe prepared this submittal and can be reached by email or phone (info below).

Thank you very much for your consideration of our firm and proposal.

Sincerely,

A handwritten signature in purple ink that reads "Bret Bauer".

Bret Bauer, Partner and Co-Founder
104 Harbor Haven St.
Gun Barrel City, TX 75156
(316) 207-0688
bbauer@governmentpros.com

A handwritten signature in black ink that reads "Chris Lowe".

Chris Lowe, Partner and Co-Founder
18605 Arrowwood Dr.
Monument, CO 80132
(785) 766-9104
clowe@governmentpros.com



Approach

Government Professional Solutions (GPS) does not operate like most national search firms. Our approach is collaborative, customized, personal, and **relationship based**. As former city managers who have served full-service cities and their elected officials, we understand first-hand how the executive search function must fit within the larger mission of the local government and the community. We are passionate about public service and we know at the core, that means our focus is about getting to know people - those in your community, and those wishing to serve your community.

City managers who know how to hire Public Sector Executives

As former city managers, we know how to get in front of top candidates. We are connected to modern, accomplished public sector executive candidates, both directly and indirectly through our extensive network of public officials. We have worked with many of them as colleagues and have personally networked with them at industry association and other events. We have served with them on boards and held leadership positions in the same organizations. We are connected to them through the university MPA programs. Most importantly, we know both the seasoned veterans AND the young up-and-coming professionals who are highly sought after by cities.

We also know the newsletters, publications, and websites these professional candidates subscribe to because we subscribe to them ourselves, and we understand which sources are trusted most.

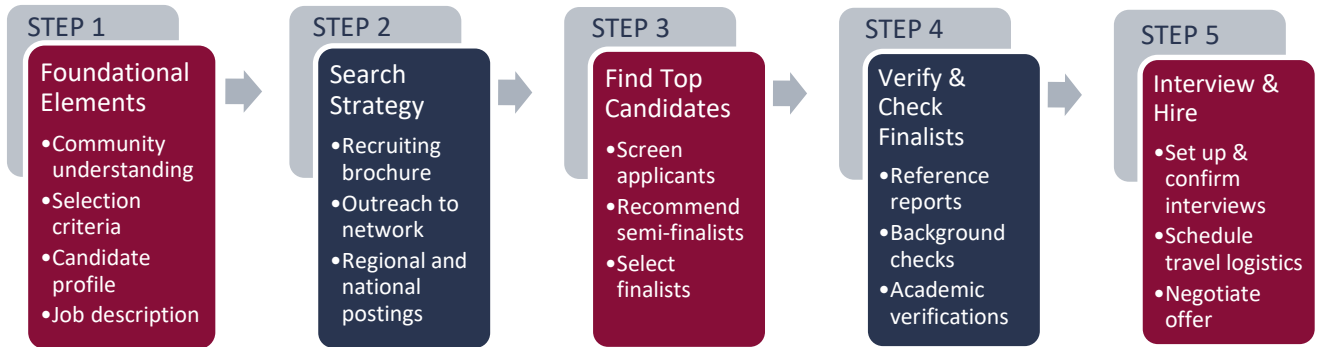
Finally, because of our lengthy and direct experience in the public sector, we are also able to screen candidates quickly and efficiently. An initial conversation by one of our senior level partners quickly yields an accurate assessment of capability and fit. This enables us to focus the majority of our energy and resources on those candidates who have the highest probability of becoming semi-finalists in the search.

A single dedicated senior level consultant by your side

Because our recruitment searches are conducted start to finish by one of our partners, you get an extremely efficient process. A single senior level person dedicated to every step of your project means no gaps or delays in information transfer among multiple staff members and consultants. It means that both you and the candidates get a very direct and responsive line of communication. And, it means you get a level of experience and personal service you know you can count on.

GPS Partner, Chris Lowe, will be the consultant on this project.

GPS will customize a search process that best serves your specific objectives and situation. Below is the general workflow we will follow



STEP 1: DEVELOP FOUNDATIONAL ELEMENTS

Understanding you and the community

The first, and most important step of our process is to spend time getting to know you and your community.

In our experience we have found that too often the process of finding the next leader for an organization is a cookie-cutter process focused on developing a community profile and quickly finding a candidate. As public executives, we understand how important it is to understand your community and to have a complete, professional, and thorough process to find top level talent for your future leaders. That is why we structure time to spend in your community to experience its amenities, economy, people, and infrastructure, and to get to know your organization and community, both individually and as a collective group.

Developing the ideal candidate profile begins with a survey sent to you, Council members, and designated staff prior to our first meeting. Members individually complete these surveys to help begin to paint the picture about what you want to see in your next Public Works Director.

We then meet on-site with you, the Council, and designated staff to discuss the required background, professional experience, and management and leadership characteristics for your position. We work with you to thoroughly understand (or help identify) the position’s requirements, current challenges, strategic priorities, and expectations.

Information obtained from these efforts, coupled with our review of any provided resources, is used to prepare selection criteria, a job position (if needed), and a candidate profile, all of which will be approved by you before recruitment begins. Spending time getting these items right is critical to ensuring an efficient and effective process to follow.

Timeframe:

1 week

Deliverables:

Community understanding

Selection criteria surveys

Job position

Candidate profile

STEP 2: DESIGN A CUSTOM SEARCH STRATEGY

We work collaboratively with you to develop a comprehensive outreach strategy to notify potential candidates about the vacancy and conduct an open recruitment that encourages applications from a talented and diverse pool of candidates. We will recommend a strategy that includes national, state, regional, and local elements.

Leveraging our network

Central to that strategy is to leverage our extensive network of public officials. Often, we know qualified candidates who are not actively seeking new employment and will not necessarily respond to an advertisement.

One of the tools we leverage is a comprehensive recruitment brochure that can accompany all networking and outreach efforts. This brochure typically includes the candidate profile defined in Step 1, a summary of challenges and priorities, and information that positions your location as a highly attractive place to live and work. *(Please see example provided in the Appendix)*

Leveraging the APWA & other professional organizations

From our decades in city leadership, when hiring a Public Works Director, we have depended on the American Public Works Association (APWA), as do the type of candidates you want for this position. Most public works executives are members, and it is the first stop for anyone in the industry looking for a new job. As 18-year members of the organization, we are highly familiar with its leadership, processes, and network. Utilizing the APWA Wisconsin Chapter would also be very important to target public works executives from within the State of Wisconsin.

We use our extensive networks at the state level to ensure we are adequately marketing to in-state candidates through the League of Wisconsin Municipalities (LWM).

Timeframe:

1-2 weeks

Deliverables:

Timeline

Recruitment
brochure

Advertisement

STEP 3: FIND TOP CANDIDATES

Upon approval of the custom search strategy and marketing tools, we promptly begin the advertising process, starting first and foremost with our network.

Application packets will be received and categorized according to the rating criteria established by you and your team to ensure that the candidate pool has the matching skills and background. You will receive weekly updates on the development of the candidate pool. Information on all applicants will be retained and organized for recordkeeping purposes and will be transmitted to you upon completion.

Each candidate submitting an application packet is sent a timely acknowledgement, including an approximate schedule for the recruitment. Throughout the process,

Timeframe:

5-6 weeks

Deliverables:

Custom
questionnaires

10-15 semi-finalist
recommendations

communications are maintained with each candidate regarding information about the recruitment progress and their status.

We will screen candidates against the position and criteria defined in Step 1 and recommend a list of 10-15 semi-finalists to you.

Two important tools we use during this process are a candidate questionnaire and a due diligence questionnaire, both customized to your unique position and situation (*please see examples of each in the appendix*). The candidate questionnaire goes to all semi-finalists and provides additional information about their background and experience. The due diligence questionnaire goes only to finalists.

We also ask semi-finalists to engage in video storytelling where they are given an opportunity to tell us about their journey in public service. This is intended to help us, and you better assess who they are as people and as leaders. This approach can help in developing a more comprehensive understanding of the candidate's ability to think on their feet as well as their personal and professional demeanor.

We will provide you with a semi-finalist report that includes copies of all marketing media, the master applicant list, as well as a cover letter, resume, completed questionnaire, and videos (if used) for each semi-finalist.

From there, we will review semi-finalist information with you and ask you to select finalists for interviews.

Timely and regular communications to candidates

Regular updates to you and your team

Semi-finalist report

STEP 4: VERIFY AND CHECK FINALISTS

When you approve a group of finalists for on-site interviews, we will begin the process of conducting reference checks, background checks, and academic verifications. A confidential reference report is prepared for each finalist to complete our understanding of his or her management and leadership characteristics and professional work performance.

For the background checks, we will collect information on the candidates in the following areas:



City/County/State Criminal



Federal District Civil Litigation



Federal District Criminal



Judgement/Tax Lien



City/County/State Civil Litigation



Sex Offender Registry



Employment Verification



Motor Vehicle Driving Record



Reference Verification



Educational Verification

Timeframe:

2 weeks

Deliverables:

Reference check results

Background check results

Academic verification results

STEP 5: INTERVIEW AND HIRE

Upon completing the candidate verifications and checks, we will work collaboratively with you to develop the final interview process.

We will provide you with a Final Candidate Report prior to commencement of interviews. This report will include a copy of the recruitment brochure and interview schedule, as well as cover letter, resume, completed questionnaires, and reference/background results for each finalist to be interviewed. It will also include our individual analysis of each candidate compared to the ideal candidate profile developed with you (e.g., our evaluation of minimum professional qualifications, responses to questionnaires, etc.). *Note: A minimum of one week is required to develop the packet of information for your review once finalists have been identified.*

Accompanying the final report will be guidelines for interviewing the finalists, suggested interview questions, and a customized interview grading tool for your interview panel(s). We will attend finalist interviews to support continuity of the process.

We will work with you to develop an interview process that is thorough and inclusive of your organization and community.

*Additional options available to you are:



Participation in deliberation of candidates.



Assistance with developing a compensation package and related employment considerations.



Assistance with employment agreement negotiation.

Finally, we will notify candidates of the final decision and will confirm final process close out items with you.

Timeframe:

2-3 weeks

Deliverables:

Interview and travel itinerary schedules

Final Candidate Report

Interview guidelines

Suggested interview questions

Interview grading tool

Candidate notifications



Experience

30+ years combined experience in city management

GPS is comprised of only senior level, former city managers with MPA degrees. Our partners share a passion for serving the public and bring a combined 30+ years of experience in leading communities. Their public service careers include serving as City Manager, Town Manager, and Assistant City Administrator throughout the country.

Resumes of Partners, Chris Lowe and Bret Bauer, are included in the appendix. Chris Lowe will be the consultant assigned to this project and will execute all tasks involved. No outside consultants are expected to be used.

18 years of successful recruiting history

RECENT RECRUITMENTS

City Manager-Junction City, KS
City Manager-DeSoto, TX
City Administrator-Grand Island, NE
Public Utilities Dir.-Grand Island, NE
Public Works Dir.-Grand Island, NE
Town Manager-Prosper, TX
City Manager-Janesville, WI
City Manager-La Grange, TX
Public Utilities Director-DeSoto, TX
Library Director-DeSoto, TX
Chief of Police-Hutto, TX

At GPS, we have been conducting executive level recruitments for 18 years. We believe the perspective we bring as former city managers and candidates, combined with the principled approach we developed based on decades of combined experience, enables us to help you find and hire the right candidate for the job the first time around.

As former city managers, we are very familiar with the types of discussions to have and questions to ask of candidates as we have been in those positions ourselves and tackled the same types of opportunities and challenges they most likely will face.

More than an executive search firm

GPS was founded with one central objective: to use our industry experience and decades of public service to help cities and counties improve their communities. Since 2006, GPS Partners Bret and Chris have been expanding their government experience and network in cities across the country to position themselves to be the best trained public servants available to serve cities and counties on a diverse range of projects, challenges, and opportunities.

Our breadth of services includes:

- Executive Search
- Budgeting
- Human Resources (Class & Comp. Studies)
- Leadership Development
- Strategic Planning
- Project Management (Interim Services)

The compass in our logo depicts our goal of providing guiding direction to our public clients and we strive to be a steady partner throughout that journey. We firmly believe in the value of **trusted relationships**, and want to be your **trusted partner**, not just another vendor.

“When we needed to hire a search firm for our next City Manager, our HR director recommended several firms. What initially attracted me to GPS was their track record of working with communities of different sizes and different areas of the country. We really wanted to find the best candidate and didn't want to limit ourselves. Next, I really loved that the two partners were both former city managers and had been through this process before on the other side. Chris and his team at GPS exceeded my expectations. First, they worked with us to create a process that worked for our City Council. They were very organized and kept us up to date on their work. Then they brought us a really strong group of candidates. And when I compared our candidate pool to some other local communities who were also going through the hiring process, I was very impressed. Finally, when it came to do the interviews and final negotiations, Chris's expertise and advice was instrumental. He helped us hire the right person and served as a liaison to make the negotiation process go more smoothly. I give Chris and GPS the absolute highest recommendation.” - Paul Benson, Council President of Janesville, Wisconsin

Demonstrated ability to complete a thorough and detailed report

We hope the steps outlined in the Approach section of this proposal have demonstrated that our process is highly thorough and detailed. Additionally, we trust the background, experience, and reputation presented about our firm, and in particular the partner assigned to this project, Chris Lowe, have demonstrated the accountability and integrity we bring to this important effort.

Likewise, we are confident the final candidate reference report we provide to you will be comprehensive and detailed, and will equip you with everything you need to carefully and thoroughly interview final candidates and make a sound and supported final decision. The report will include:

Information on each finalist:

- ➊ Cover letter and resume
- ➋ Completed questionnaires
- ➌ Reference/background results
- ➍ GPS analysis/evaluation
- ➎ Video Storytelling (if used)

Additional supporting information:

- ➊ Recruitment brochure
- ➋ Interview schedule
- ➌ Interview guidelines
- ➍ Suggested interview questions
- ➎ Customized interview grading tool

References

Owner/address/telephone contact	City of DeSoto, TX / Denae Greenly, Human Resources Director 211 East Pleasant Run Road, DeSoto, TX 75115 (972) 230-9602, dgreenly@desototexas.gov
Project name	Executive recruitment for City Manager
Project description	Performed national executive recruitment services to recruit for a City Manager to be a part of DeSoto's Executive Team.
Position or capacity on the project	GPS Partner, Bret Bauer, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	City of Grand Island, NE /Aaron Schmid, Director of Human Resources 100 East First Street, Grand Island, NE 68801 (308) 385-5444, aarons@grand-island.com
Project name	Executive recruitment for Public Utilities Director
Project description	Performed national executive recruitment services to recruit for a Public Utilities Director to be a part of Grand Island's Executive Team.
Position or capacity on the project	GPS Partner, Chris Lowe, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	City of Grand Island, NE /Aaron Schmid, Director of Human Resources 100 East First Street, Grand Island, NE 68801 (308) 385-5444, aarons@grand-island.com
Project name	Executive recruitment for Public Works Director
Project description	Performed national executive recruitment services to recruit for a Public Works Director to be a part of Grand Island's Executive Team.
Position or capacity on the project	GPS Partner, Chris Lowe, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	City of Grand Island, NE /Aaron Schmid, Director of Human Resources 100 East First Street, Grand Island, NE 68801 (308) 385-5444, aarons@grand-island.com
Project name	Executive recruitment for City Administrator

Project description	Performed national executive recruitment services to recruit for a City Administrator to be a part of Grand Island's Executive Team.
Position or capacity on the project	GPS Partner, Chris Lowe, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	Town of Prosper, TX / David Bristol, Mayor 250 W. First Street, Prosper, TX 75078 (972) 965-0446, dbristol@prospertx.gov
Project name	Executive recruitment for Town Manager
Project description	Performed national executive recruitment services to recruit for a Town Manager to be a part of Prosper's Executive Team.
Position or capacity on the project	GPS Partner, Bret Bauer, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	City of Janesville, WI / Paul Benson, Council President 18 N. Jackson Street, Janesville, WI 53548 (608) 352-8010, bensonp@ci.janesville.wi.us
Project name	Executive recruitment for City Manager
Project description	Performed national executive recruitment services to recruit for a City Manager to be a part of Janesville's Executive Team.
Position or capacity on the project	GPS Partner, Chris Lowe, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	City of La Grange, TX / Jan Dockery, Mayor 151 S. Banner Street, Elizabeth, CO 80107 (979) 968-5805, citysecretary@cityoflg.com
Project name	Executive recruitment for City Manager
Project description	Performed national executive recruitment services to recruit for a City Manager to be a part of La Grange's Executive Team.
Position or capacity on the project	GPS Partner, Bret Bauer, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	City of DeSoto, TX / Denae Greenly, Human Resources Director 211 East Pleasant Run Road, DeSoto, TX 75115 (972) 230-9602, dgreenly@desototexas.gov
Project name	Executive recruitment for Public Utilities Director
Project description	Performed national executive recruitment services to recruit for a Public Utilities Director to be a part of DeSoto's Executive Team.
Position or capacity on the project	GPS Partner, Bret Bauer, served as Project Manager for this recruitment

Related litigation, administrative proceedings, or claims	None
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Owner/address/telephone contact	City of DeSoto, TX / Denae Greenly, Human Resources Director 211 East Pleasant Run Road, DeSoto, TX 75115 (972) 230-9602, dgreenly@desototexas.gov
Project name	Executive recruitment for Library Director
Project description	Performed national executive recruitment services to recruit for a Library Director to be a part of DeSoto's Executive Team.
Position or capacity on the project	GPS Partner, Bret Bauer, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	City of Hutto, TX / Stacy Schmitt, Assistant to the City Manager 500 West Live Oak Street, Hutto, TX 78634
Project name	Executive recruitment for Chief of Police
Project description	Performed national executive recruitment services to recruit for a Chief of Police to be a part of Hutto's Executive Team.
Position or capacity on the project	GPS Partner, Bret Bauer, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	Aubrey Municipal Development District, Aubrey, TX / Jesse Auer, President 107 S. Main Street, Aubrey, TX 76227 (940) 440-9343, jauer@aubreytx.gov
Project name	Executive recruitment for Executive Director
Project description	Performed national executive recruitment services to recruit for a Executive Director to be a part of Aubrey's MDD Team.
Position or capacity on the project	GPS Partner, Bret Bauer, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	Town of Elizabeth, Colorado / Megan Vasquez, Mayor 151 S. Banner Street, Elizabeth, CO 80107 (303) 646-4166, megan.vasquez@townofelizabeth.org
Project name	Executive recruitment for Town Administrator
Project description	Performed national executive recruitment services to recruit for a Town Administrator to be a part of Elizabeth's Executive Team.
Position or capacity on the project	GPS Partner, Chris Lowe, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	City of Hutto, Texas / Warren Hutmacher, City Manager 500 W. Live Oak Street, Hutto, TX 78634 (512) 759-4015, warren.hutmacher@huttotx.gov
Project name	Executive recruitment for Public Works Director
Project description	Performed national executive recruitment services to recruit for a Public Works Director to be a part of Hutto's Executive Team.
Position or capacity on the project	GPS Partner, Bret Bauer, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Owner/address/telephone contact	City of Hutto, Texas / Warren Hutmacher, City Manager 500 W. Live Oak Street, Hutto, TX 78634 (512) 759-4015, warren.hutmacher@huttotx.gov
Project name	Executive recruitment for Chief Financial Officer
Project description	Performed national executive recruitment services to recruit for a Chief Financial Officer to be a part of Hutto's Executive Team.
Position or capacity on the project	GPS Partner, Bret Bauer, served as Project Manager for this recruitment
Related litigation, administrative proceedings, or claims	None

Testimonials

*"When we needed to hire a search firm for our next City Manager, our HR director recommended several firms. What initially attracted me to GPS was their track record of working with communities of different sizes and different areas of the country. We really wanted to find the best candidate and didn't want to limit ourselves. Next, I really loved that the two partners were both former city managers and had been through this process before on the other side. Chris and his team at GPS exceeded my expectations. First, they worked with us to create a process that worked for our City Council. They were very organized and kept us up to date on their work. Then they brought us a really strong group of candidates. And when I compared our candidate pool to some other local communities who were also going through the hiring process, I was very impressed. Finally, when it came to do the interviews and final negotiations, Chris's expertise and advice was instrumental. He helped us hire the right person and served as a liaison to make the negotiation process go more smoothly. **I give Chris and GPS the absolute highest recommendation.**" - Paul Benson, Council President of Janesville, Wisconsin*

*"Government Professional Solutions (GPS) and specifically Bret Bauer exceeded my expectations during our search for a new Town Manager. Bret brought years of experience in municipal government as well as a vast network of potential candidates to the search. Not only did he accomplish the task, he did it in a professional, expeditious and cost effective method. His attention to detail and clear sense of the urgency of the need was critical to our council and to the candidates. **I strongly recommend GPS and will utilize them if needed in the future.**" - David Bristol, Mayor of Prosper, Texas*

"As a Trustee of the Town of Elizabeth, Colorado, I am pleased and honored to write on behalf of Chris Lowe and his partner, Bret Bauer, of Government Professional Solutions. GPS was chosen to conduct the search effort for a permanent Town Administrator who could restore confidence for the staff and the community within an

atmosphere of doubt. The decision to engage Chris and Bret was easy, given their individual backgrounds in city management and boots on the ground experience. Almost immediately upon their selection, our currently serving Interim Administrator accepted a permanent position closer to his home, and the Town was once again without daily leadership. Chris offered GPS' services to serve in this role while they continued the search for a permanent Administrator. My personal view is that this was an unexpected blessing, as in this way Chris could not only utilize his professional expertise in the search effort but would also come to know the subtle nuances of our Board, the organization, and the community to identify the perfect pool of candidates. Additionally, the Board engaged GPS to conduct the search effort to fill the vacant position of Community Development Director. **Chris led us on a remarkable journey of discovery as to how to function at our highest level as a Board of Trustees, beginning with a series of strategic planning workshops to identify first: who we are as a community; and secondly: what are the values we embrace and how can we best preserve and protect them.** Chris allowed us to explore myriad ideas while sharpening the focus on how those ideas reflect our values and goals. Never had we participated in such an important exercise, and the experience established unity and helped build consensus among Board members that had earlier struggled with distrust and dissonance. Chris and Bret shepherded us through the process of evaluating the many highly qualified candidates they attracted for us to consider, and we selected someone whom I believe will be not only a neighbor but an exceedingly engaged contributor serving our community of residents and business owners. This of course signaled a conclusion to the tremendously productive time spent with Chris, but it is my hope that we will maintain our relationship with future engagements, especially with respect to strategic planning and budget workshops that were invaluable and frankly life-changing for our Board and staff. **I wholeheartedly recommend Government Professional Solutions for their firsthand professional expertise and experienced understanding of the unique challenges facing municipalities. They truly create the solutions needed for those striving to do their best for the communities in which they serve.**" - Tammy Payne, Trustee of Town of Elizabeth, Colorado

"Chris Lowe, with Government Professional Solutions, was **professional, enthusiastic, and showed great dedication to the Town's search for their next Town Administrator**, while taking on the role as the Interim Town Administrator. He provided team management skills and a hands-on approach to ensure the sustainability of the town, staff and board." - Megan Vasquez, Mayor of Town of Elizabeth, Colorado

"I'm writing this letter of recommendation on behalf of Bret Bauer, Partner & Co-Founder of Government Professional Solutions ("GPS") who I have had the pleasure of working with over the past 7 months related to our Chief Financial Officer placement with the City of Hutto, and our most recent placement for a Director of Public Works & Engineering. Bret (along with his colleague Chris Lowe) have been extremely thorough with the recruitment process from inception to negotiating and extending the offer. **Bret's experience of serving in city management roles has been extremely beneficial, as he understands the needs of city government experience for these types of placements, which is most valuable during the screening process.** This streamlines my time as the City Manager to focus on City issues, as I know we are in good hands, as Bret takes the time needed to figure out exactly the type of background and personality we are in search of for any given position, and only presents those top-notch candidates meeting our criteria. GPS creates the hiring brochure, which is necessary to initially attract potential candidates, and is meticulous in their overall screening process and always carves out time to answer any questions I might have during the process. They have great attention to detail, and a great pool of candidates. This is the reason I have continued to use GPS for other placements within the City of Hutto. **I would highly recommend Government Professional Solutions to any City or Government entity looking to recruit for executive-level positions.**" - Warren Hutmacher, City Manager of Hutto, Texas

*"As the former mayor of Gun Barrel City, Texas, it was my pleasure to work with Bret Bauer, our city manager, for over four years. Bret had the experience and background to immediately work on and solve problem areas within our city infrastructure. It took no time at all for Bret to gain the trust and admiration of the city employees. **Cities are faced daily with problems that require outside professional help. These professional(s) must have firsthand knowledge of how municipalities operate. Mr. Bauer and Mr. Lowe have that knowledge from their years of working for and with cities. GPS is the company any city can depend on for help when help is needed.**"* - Jim Braswell, Former Mayor of Gun Barrel City, Texas

*"Effective and efficient government operations is more important than ever. I've known Chris Lowe for over a decade and his ability to improve government services and achieve goals for a community is outstanding. **The consultants with GPS are highly qualified to assist you in solving problems and guiding public decision-makers toward the best paths forward for improvement.**"* - Dave Corliss, City Manager of Castle Rock, Colorado

*"In government, there are two types of leaders; those that are interested in getting the job done, and those afraid to tackle the tough problems. In my twenty plus years of work with governmental entities, I can say that Chris Lowe was among the best and most committed to getting the job done. Chris has a keen ability to find the right tool and the right path to solve a variety of problems, whether negotiation with an employee group, transition of the City to an updated or automated process or responding to a politically charged community issue. Strength of character and integrity are hallmarks of how Chris approaches his work. His research and presentations to elected officials are thorough, data driven, and effective. I have watched him build consensus around difficult problems and implement solutions that have carried his communities forward through tough challenges. **If your community has a problem in search of a solution, Chris Lowe can navigate those waters with your organization and help you find your port in a storm.**"* - Douglas B. Harris, City Attorney, Harris, Harris, & Sommer, LLC

"I had the pleasure to offer Chris Lowe the position as City Administrator for Baldwin City, Kansas early on in my term as Mayor. I felt that the experiences and energy that he could bring to our community would be extremely impactful, but I had no idea on how impactful it would ultimately be. Chris was so eager to learn so much about our community. He jumped into our utility enterprise, which included electrical generation as well as water and wastewater treatment. He handled all the challenges that those entities bring to City Management, very effectively. He developed personal relationships that last to this day. He built and developed a great team of professionals that carried out the combined vision that he and the City Council had for the community. One can drive around our community and in a very short distance, can see the enormity of the projects that have Chris's imprint. When you communicate the vision to Chris, you can be assured that he will bring that vision to life. He also is a consensus builder and works effectively to build relationships with other governmental agencies. I am proud that we had Chris in our community and so proud of the work he led to make our community even better." - Ken Wagner, Former Mayor of Baldwin City, Kansas

*"Chris Lowe has the unique ability to identify and attract key individuals in any organization and knows how to best utilize their skills to achieve the best results possible. His outstanding leadership abilities are very well-suited for any team environment, and he is a proven leader in all areas of municipal government. **I highly recommend Chris and his team to lead and guide any community forward through the unique problems that constantly present themselves.**"* - Jeff Kaiser, Former Mayor & Trustee, Town of Monument

Agreement to use City of Fort Atkinson contract

GPS is happy to execute a standard contract form provided by the City or if preferred, we can provide our standard engagement agreement. GPS further acknowledges that our firm maintains, or will acquire, the minimum or greater of the insurance limits required.

Agreement to complete project according to project schedule

The timeline at right provides a general breakdown of tasks, milestones, and timeframes to support a thorough and successful recruitment process.

This timeline is a suggestion only and we will work with you to finalize and approve an exact timeline.

SUGGESTED TIMELINE

City of Fort Atkinson Public Works Director Executive Search Services

The City will be asked to approve a final timeline before any recruitment begins, the timeline may be lengthened, if so desired





Overall cost and value of project

GPS offers a firm, fixed fee of \$22,500 to conduct a professional executive search, ***which includes all our expenses and costs.***

In other words, the only thing you will pay GPS is the agreed upon fee. This includes costs for professional graphic design, background and academic verification, and consultant travel and expenses. This means the only other costs you will be responsible for are the costs associated with the candidates' (and spouses, if invited) travel, accommodations, and meals for the interview process.

The advantage to you is you know exactly what you will pay and do not have to worry about reviewing costs associated with the project.

We will bill the fee as the phases are completed and according to the following schedule:

- \$12,500 upon execution of contract
- \$7,000 upon selection of group of semi-finalists
- \$3,000 upon completion of negotiations with final candidate



Appendix

Appendix includes:

- City of Fort Atkinson – Authorization and Price Proposal Form
- Sample City Manager search report (Final Candidate Report)
- Sample recruitment brochure
- Sample questionnaire (candidate and due diligence)
- Resumes (Chris Lowe and Bret Bauer)
- Certificate of insurance

City of Fort Atkinson
Proposal to Provide Recruitment Services For the
position of Public Works Director

I hereby certify that I am authorized to make this offer on behalf of the named company and to bind said company to this proposal. By submitting this proposal, I hereby represent that the firm identified below is fully qualified to perform the services described to achieve the organization's objectives in a professional manner.

Name of Firm	<u>Government Professional Solutions, LLC</u>
Address	<u>18605 Arrowwood Dr.</u>
City/State/Zip	<u>Monument, CO 80132</u>
Signature	<u></u>
Name (Print)	<u>Chris Lowe</u>
Title	<u>Partner</u>
Telephone Number	<u>(785) 766-9104</u>
E-Mail Address	<u>clowe@governmentpros.com</u>
Date Submitted	<u>December 5, 2024</u>

PRICE PROPOSAL

Total Cost of Activities - All costs related to travel, supplies, etc., are to be included.

Total, not-to-exceed cost: \$ 22,500.00

Final Candidate Report for



Below are the documents in this Final Candidate Report:

Ideal Candidate Profile
Recruitment Brochure
Marketing Media (Job Advertisement)
Master Applicant List (Selection Grading Criteria Matrix)
Interview Schedule
Cover Letter
Resume
Candidate Questionnaire
Due Diligence Questionnaire
Zoom Video Recording (already provided)
Background Summary
Internet Research
YouTube Research
Email Correspondence

Town of Prosper, Town Manager Candidate Profile

The Town Manager shall be someone with confidence borne from expertise and experience in Texas, possessing a calm and approachable demeanor. He/she will have outstanding leadership skills, a management style who can work as an active part of a team, be a strategic thinker and listener, is trustworthy, and dependable. He/she will be a servant leader and always demonstrate honesty, integrity, fairness, and diplomacy. The Town Manager will be friendly, humble, calm and collected, even during chaos, and will desire to immerse themselves in and be a part of this community. Someone who is an expert in being a good person.

The Town Manager will be a motivator who will work collaboratively with staff and empower them. This person will possess a positive and supportive management style who can build staff up. He/she will be the voice for staff with Council and the public. He/she will be respectful of all, mentor, set priorities, provide resources, have high expectations and ensure accountability. This person will encourage teamwork and is comfortable getting in the trenches to get the job done. While this person will be a leader of the staff he/she will also be a hands on project manager.

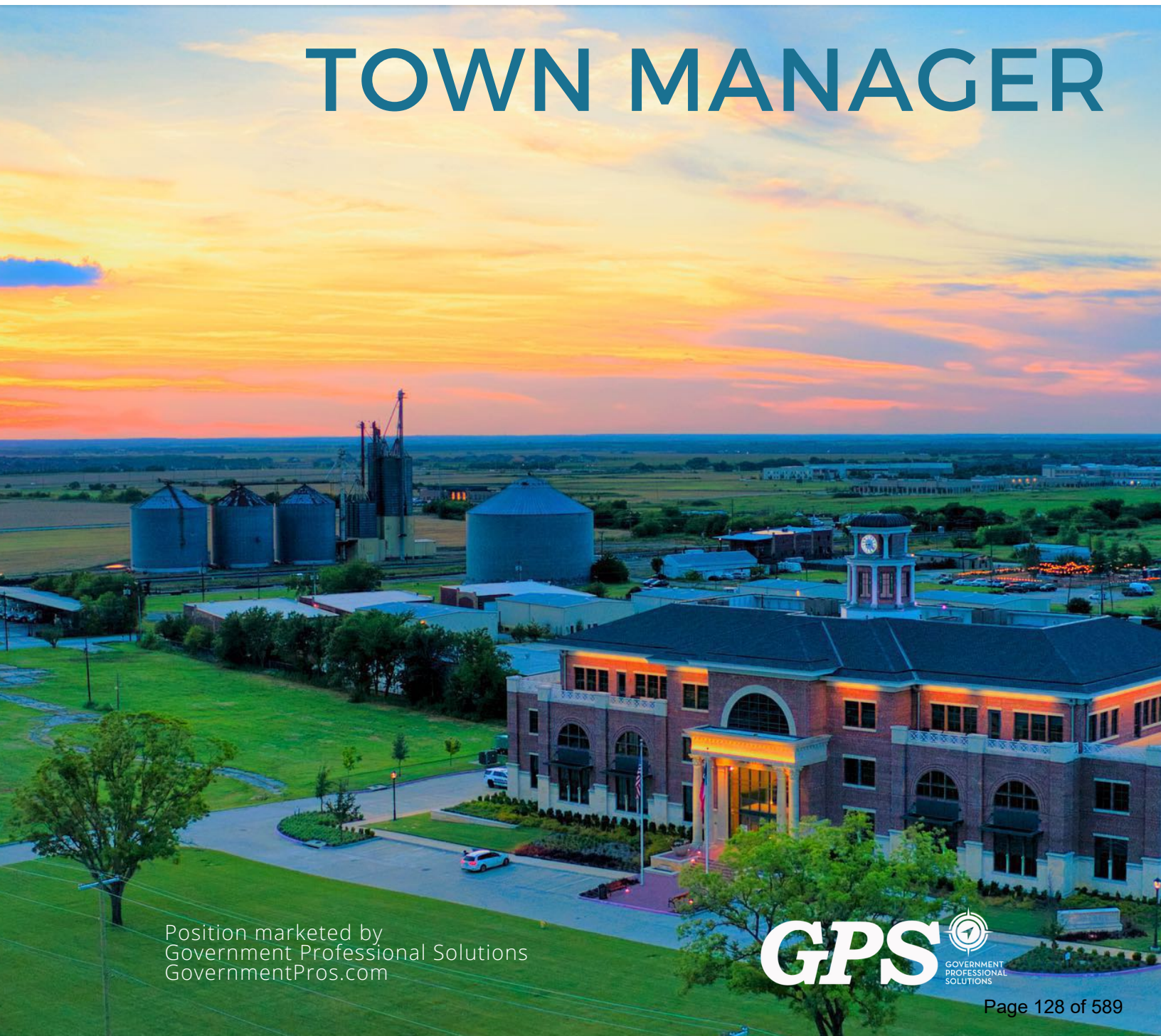
He/she will be professional, but also friendly and outgoing with a sense of humor. This person must have outstanding communication skills, both verbal and written. Will be gifted in making clear and concise presentations to the Town Council and public. The Town Manager must be able to lead and guide the Council without taking sides or playing politics, always providing their best professional recommendations. He/she will have a strong financial and budgeting background and will ensure the financial data is accurate every time, all the time. Experience managing a growth environment in residential and commercial development. Including planning, growing, and meeting infrastructure needs. He/she must have the skills to, in coordination with the economic development, develop, negotiate and implement incentive and development agreements.

The Town Manager will have a Bachelor's degree from an accredited college or university in Public Administration, Business Administration, Public Policy, or related field and a minimum of 7 years of progressively responsible management and supervisory experience as a city/town or county manager for a similar size population base or as an Assistant or Deputy in a larger community. A Master's degree in Public Administration or Business Administration or related field is preferred. Current member of ICMA and TCMA in good standing.



The Town of Prosper, Texas is hiring a

TOWN MANAGER



Position marketed by
Government Professional Solutions
GovernmentPros.com



WELCOME TO THE TOWN OF PROSPER, TEXAS

Community

The Town of Prosper is a fast growing community offering a high quality of life, where neighbors know each other and kids can play in a safe, friendly community.

With its proximity to the Dallas/Fort Worth area, the Town of Prosper has been an especially attractive place to put down family roots for CEOs and executives, and top tech and medical talent. The Town's annual growth rate has been between 9% and 13% for the past five years.

Location

North of Dallas, Prosper is located less than 30 minutes from 2 major airports: Dallas Love Field and Dallas/Fort Worth International. The Town is just 35 miles from Downtown Dallas and 55 miles from Fort Worth. Prosper's land area is 27 square miles.

Demographics

Population: 35,430, with a total buildout projection of 70,000 residents by 2040

	Median Household Income	\$153,777
	Median Earnings/Worker	\$85,560
	Median Housing Value	\$436,600
	Median Monthly Owner Cost with Mortgages	\$2,921/month
	Median Monthly Rent	\$1,482/month
	Owner-Occupied Housing	86.5%
	Prosper Residents with Health Insurance	95.4%

History

The Town of Prosper began as a farming community in Collin County in the early 1900s. In its early years, the town was also a central stop for the railroad between Dallas and Sherman. Prosper was incorporated in 1914 with a population of 500.

Entertainment and recreation

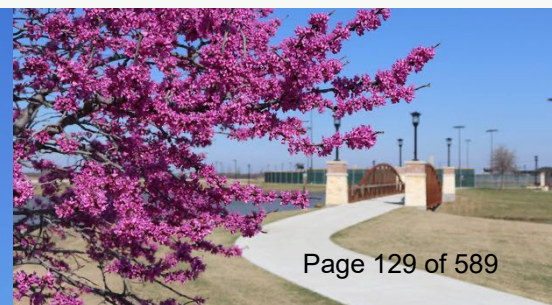
Prosper prides itself on having parks and recreation facilities that promote healthy lifestyles for all ages and enhance property values.

The Town is home to more than 350 acres of park, including open spaces, recreational venues, athletic facilities, and tennis courts. More than 30 miles of hike and bike trails weave throughout Prosper with plans for additional trails.

Frontier Community Park features a major sports complex with lighted natural and turf fields for a variety of sports. Other features include trails, pavilion, concessions, catch and release pond, splash pad, and Windmill Playground.

With Prosper's signature, historical grain silos adjacent to an impressive Town hall, inviting Food Truck Park, and welcoming outdoor space, Downtown Prosper is home to one-of-a-kind boutique stores, restaurants, and services. Downtown Masterplan was recently adopted and is currently being implemented.

Prosper also offers a wide array of nationally recognized retail stores and restaurants.



Business and Commerce

The Town of Prosper is a fast growing community with a strong pro-business mindset. The area's top employers are:

- Prosper ISD
- Lowe's
- Kroger
- Cook Children's
- Town of Prosper
- Dick's S.G./Field & Stream
- Walmart
- Longo Toyota
- Chick-fil-A
- Texas Health Resources



Education

Among Prosper residents 25 and older, 58% have earned a Bachelor's degree or higher level of education. Another 27% of the 25+ population have an Associate's degree or at least some college, and 98% are high school graduates.

Most of Prosper's geographic area is located in the boundaries of the Prosper Independent School District (PISD). Prosper ISD is located in both Collin and Denton Counties and serves students living in Prosper, Celina, McKinney, Frisco, and Aubrey.

Prosper ISD is a top rated public school system, ranking #10 on *Niche.com's* 2023 Best School Districts in Texas. As an accredited district, PISD develops and graduates motivated, academically prepared individuals with the strength of character to make contributions to a rapidly-changing society through an educational system that maintains high expectations, provides quality instruction, and establishes a safe, orderly learning environment.

Prosper ISD continues to be one of the fastest-growing school districts in Texas. In 2021-2022, the district had more than 22,000 students and more than 2,600 staff members serving 14 elementary schools, 4 middle schools, and 2 high schools. By buildout, the district is expected to have 28-30 elementary campuses, 9-10 middle schools, and 4-5 high school campuses.

Support for Prosper ISD is strong. A school bond election in May 2019 was approved by 85% of those who voted. The majority of the \$1.337 billion bond – specifically 84% – funds the building of new school facilities.

Prosper ISD is among only 250 school districts in the United States and Canada, and only 17 school districts in the State of Texas named to the College Board AP District Honor Roll. 29 Advanced Placement (AP) courses, 20 Pre-AP courses, and 10 dual credit courses are offered at the high school level.

Prosper is home to championship teams, and to Children's Health Stadium. Opened in August 2019, the \$52 million facility houses the football stadium, natatorium, and meeting facilities.

Government

The Town of Prosper is a home rule town with a mayor and six council members who are elected at large for three-year terms. The Town Manager serves as Chief Administrative Officer to Prosper and is responsible to the council.

"Prosper is a place where everyone matters." The Town of Prosper strives to be a place where every resident has a voice, where decisions are made in the best interest of everyone, and where government is open and transparent. The municipal departments each play a role enriching the Town and supporting the residents.

Prosper Community Vision

Prosper is a community committed to excellence. It is a high-quality, family-oriented community maintaining a visually aesthetic open feel with job-producing, economically sustainable commercial development directed to the Town's major transportation corridors, all while maintaining strong fiscal responsibility, and meeting the infrastructure needs of the Town.

Prosper Strategic Vision 2036

- Prosper 2036 has a small town relationship/feeling that is a family-friendly community.
- Prosper 2036 is a beautiful and safe community.
- Prosper 2036 is a high-value residential community with a quaint and cool downtown and a dynamic tollway corridor.
- Prosper 2036 has leisure experiences for all.

Fiscal Year 2021-2022 Budget Highlights

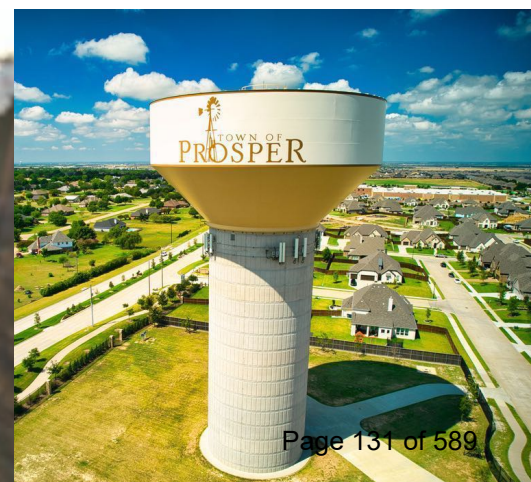
- First year accelerated implementation of \$210 million bond program (\$40 million versus \$21 million)
- \$.01 decrease in property tax rate
- No increase in utility rates for Town customers
- Continued growth in property tax and sales tax
- Continued staff additions to public safety

Fiscal Year 2022-2023 Appropriations Highlights

- Total Appropriations-Operating Budget: \$95,616,751
- General Fund: \$51,833,412
- Debt Service Fund: \$12,911,163
- Water & Sewer Fund: \$28,112,759
- Drainage Utility Fund: \$2,500,000
- Capital Improvement Fund: \$58,295,000
- Capital Dedication Levy: \$6,700,000

Current Project Highlights

- Many road projects
- Water and sewer infrastructure
- New fire stations
- Downtown Masterplan implementation
- Raymond Community Park and other park projects
- Implementing town-wide ERP systems
- Updating Comprehensive Plan



Under the direction of the Town Council, the Town Manager serves as Chief Administrative Officer of the Town and oversees the daily operations of the Town. The Town Manager is responsible to the Town Council for administration of all the affairs of the Town, with only those exceptions that are named in the Town Charter. Example duties include:

Town Council

- Attend all Town Council meetings, with the right to take part in discussion.
- Keep Town Council fully advised as to financial conditions and future needs, and make recommendations.
- Prepare agenda items for, and give presentations to Town Council and Boards and Commissions.
- Inform Town Council of all work-related activities.

Administration

- Direct and supervise administration of 347 total number of town employees, all departments, offices, and agencies, except as otherwise provided by law or the Town Charter.
- Consult and direct all Town employees in solving administrative and operational problems, and developing and implementing changes in organizational structure, policies, or procedures to meet operational and fiscal goals.
- Make reports concerning the operations of Town departments, offices, or agencies.

Economic Development

- Develop and negotiate Town economic development agreements as needed in coordination with the Prosper Economic Development Corporation.
- Oversee, through various departments, construction projects designed to enhance Town infrastructure effectiveness and support economic development projects.
- Promote Town programs, activities, services, and business opportunities.

Financial

- Oversee preparation of and recommend the annual budget and capital program, and administer the budget as adopted.
- Administer operating and capital budget duties, including establishing policies for carrying out budget directives and reviewing operating and capital budgets periodically to analyze trends.

- Assure Town operations are performed within budget; prepare cost control activities; monitor revenues and expenditures to assure sound fiscal control; and ensure efficient use of Town budget funds, personnel, materials, facilities, technology, and time.

Human Resources

- Appoint, suspend, and remove all Town employees and appointive administrative officers, except as otherwise provided by law.
- Provide guidance and support to all departments regarding employee development and furthering the organizational culture of the Town.

Planning

- Develop long and short-range plans for all Town operations.
- Identify more efficient and effective ways of accomplishing Town service delivery.
- Plan, coordinate, and direct the work of Town departments through delegation of authority and responsibility to department executive directors and directors.

Policy and Procedure

- See that all state laws and Town ordinances are effectively enforced.
- Review applicable federal, state, and local laws, ordinances, and regulations for compliance and make recommendations.
- Administer policies and procedures within the Town and ensure that appropriate linkages exist between budget goals, purchasing procedures, and funding limitations and service levels adopted to meet specific departmental and Town Council goals.
- Adhere to personnel, safety, and other policies and procedures.

Public Relations

- Develop positive relationships and coordinate Town affairs with federal, state, and local entities and agencies, civic and private groups, and residents.
- Working with staff, respond to and resolve resident and development inquiries and concerns and negotiate and resolve controversial issues.

- Bachelor's degree from an accredited college or university in Public Administration, Business Administration, Public Policy, or related field required (Master's degree preferred).
- Minimum seven years experience of progressively responsible management and supervisory experience as a city/town or county manager for a similar size population base, or as an Assistant or Deputy in a larger community.
- Current member of International City/County Management Association (ICMA) and Texas City Management Association (TCMA) in good standing.
- Strong financial and budgeting background with ability to ensure financial data is accurate every time, all the time.
- Strategic thinker.
- Experience managing a growth environment in residential and commercial development, including planning, growing, and meeting infrastructure needs.
- Skills to develop, negotiate, and implement incentive and development agreements (in coordination with economic development).
- Gifted at making clear and concise presentations to Town Council and the public.
- Outstanding communication skills, both verbal and written.
- Outstanding leadership skills.
- Servant leader who always demonstrates honesty, integrity, fairness, and diplomacy.
- Motivator who works collaboratively with and empowers staff.
- Positive and supportive management style that builds staff up, is respectful of all, provides mentoring, sets priorities, provides resources, has high expectations, and ensures accountability.
- Hands-on project manager who encourages teamwork and can work as an active part of a team.
- Able to lead and guide Town Council by providing options and building consensus; always providing the best professional recommendations.
- Calm and approachable demeanor, active listener, and remains cool and collected.
- Trustworthy and dependable.
- Professional, while also friendly and outgoing with a sense of humor.
- Desire to immerse oneself in and be a part of the community.

HOW TO APPLY

Compensation: Annual base salary will depend on qualifications but is expected to be in the range of \$230,000 to \$260,000. Position also includes a car allowance, TMRS with a 2 to 1 match as well as a generous contribution to a health, dental, vision, and life insurance package.

To apply, please email your cover letter and resume in .pdf format by Friday, November 18, 2022, 5 pm CST, to bbauer@governmentpros.com. Position is open until filled. Faxed and mailed submissions will not be considered. Direct questions to Bret Bauer at 316-207-0688 or bbauer@governmentpros.com.

For additional information about the Town of Prosper, please visit:

ProsperTX.gov

Facebook.com/prosperTX

Prosperedc.com

Prosper-isd.net

The Town of Prosper is an Equal Opportunity Employer and does not discriminate on the basis of race, color, religion, national origin, sex, age, disability, genetic information, or any other status protected by law or regulation. It is the Town's intention that all qualified applicants be given equal opportunity and that selection decisions are based on job-related factors.

Town of Prosper, Texas
Town Manager

The Town of Prosper is a fast growing community offering a high quality of life, where neighbors know each other and kids can play in a safe, friendly community.

With its proximity to the Dallas/Fort Worth area, the Town of Prosper has been an especially attractive place to put down family roots for CEOs and executives, and top tech and medical talent. The Town's annual growth rate has been between 9% and 13% for the past five years.

The Town Manager is responsible to the Prosper Town Council for maintaining and operating the Town in a professional manner and administration of all Town affairs. This position manages and directs the day-to-day operations of the Town based on the ordinances and policies established by the Town Council. The Town Manager oversees operation of the Town's departments, including Building Inspection, Communication & Community Engagement, Economic Development, Engineering, Finance, Fire, Health & Code Compliance, Human Resources, Library, Municipal Court, Parks & Recreation, Planning, Police, Public Works, Purchasing, Stormwater Management, Town Secretary, Utility Billing/Trash & Recycling, and Water Conservation. This position is responsible for a \$95.6M operating budget.

This position also works closely with community members, local school members, and is highly visible at community events.

Please use the following link to apply: [Please Click Here to Apply](#)

For more information about this position, please reach out to Bret Bauer, GPS Partner at bbauer@governmentpros.com
(316) 207-0688

Town of Prosper, Town Manager Candidate Selection Criteria (Matrix)

Evaluator: Bret Bauer

Scoring: 1-10 with 10 being the highest

Categories are weighted & equal 100

	Experience: Relevance of previous management experience & success with a similar organization	Education: Relevant Education and/or Training	Philosophy & Approach: Candidate's ability to manage and implement Council objectives	Accomplishments: Previous accomplishments demonstrating leadership, teamwork, empowering staff & innovation	Versatility: Broad organizational knowledge (including budgeting, managing growth & economic development, strategic planning & leadership development)	Longevity: Candidate's previous record of serving an organization long-term	Presentation: Candidate's overall resume/application approach (organization, legibility, literacy)	TOTAL SCORE	Semi-Finalist	Finalist
	(25%)	(15%)	(20%)	(10%)	(20%)	(5%)	(5%)			
	6.0	10.0	7.0	7.0	7.0	6.0	10.0	7.45		
	5.0	9.0	5.0	6.0	6.0	6.0	10.0	6.40		
	0.0	10.0	3.0	4.0	3.0	3.0	9.0	4.10		
	8.0	10.0	8.0	8.0	8.0	7.0	10.0	8.45		
	0.0	9.0	3.0	5.0	3.0	3.0	10.0	4.10		
	7.0	10.0	7.0	8.0	7.0	9.0	10.0	8.00		
	9.0	10.0	8.0	8.0	9.0	9.0	10.0	8.95	Yes	Yes
	7.0	10.0	8.0	7.0	8.0	7.0	10.0	8.05		
	5.0	10.0	6.0	7.0	5.0	6.0	10.0	6.75		
	4.0	10.0	4.0	5.0	3.0	6.0	10.0	5.60		
	6.0	10.0	6.0	6.0	6.0	5.0	10.0	6.95		
	6.0	9.0	4.0	4.0	4.0	9.0	9.0	6.00		
	8.0	10.0	7.0	8.0	5.0	10.0	10.0	8.00		
	6.0	9.0	6.0	7.0	6.0	7.0	9.0	6.95		
	5.0	10.0	5.0	6.0	5.0	6.0	10.0	6.45		
	0.0	9.0	3.0	4.0	3.0	5.0	10.0	4.05		
	7.0	10.0	8.0	7.0	8.0	7.0	10.0	8.05		
	6.0	9.0	6.0	7.0	8.0	9.0	10.0	7.40		
	5.0	10.0	5.0	5.0	7.0	6.0	10.0	6.60		
	0.0	0.0	0.0	0.0	0.0	3.0	9.0	0.60		
	0.0	10.0	0.0	0.0	0.0	0.0	9.0	2.45		
	8.0	10.0	7.0	8.0	8.0	7.0	10.0	8.30		
	9.0	10.0	8.0	8.0	9.0	8.0	10.0	8.90	Yes	No
	9.0	10.0	8.0	9.0	8.0	8.0	10.0	8.90		
	5.0	10.0	4.0	4.0	3.0	7.0	10.0	5.75		
	7.0	10.0	8.0	8.0	7.0	5.0	10.0	7.95		
	7.0	10.0	7.0	8.0	8.0	10.0	10.0	8.20		
	0.0	9.0	0.0	0.0	0.0	8.0	10.0	2.70		
	9.0	10.0	8.0	8.0	9.0	8.0	10.0	8.90	Yes	No
	9.0	10.0	9.0	8.0	9.0	9.0	10.0	9.10		
	5.0	9.0	5.0	7.0	5.0	6.0	10.0	6.40		
	6.0	10.0	5.0	7.0	6.0	9.0	10.0	7.15		
	5.0	10.0	6.0	5.0	6.0	6.0	10.0	6.60		
	0.0	10.0	0.0	2.0	0.0	5.0	9.0	3.00		
	7.0	10.0	7.0	7.0	8.0	8.0	10.0	7.95		
	7.0	10.0	8.0	7.0	8.0	8.0	10.0	8.10	Yes	No
	0.0	9.0	0.0	4.0	0.0	7.0	10.0	3.25		
	5.0	10.0	6.0	5.0	7.0	7.0	10.0	6.80		
	0.0	10.0	0.0	2.0	0.0	4.0	10.0	3.00		
	7.0	10.0	6.0	7.0	6.0	6.0	10.0	7.40		
	8.0	10.0	8.0	7.0	8.0	8.0	10.0	8.35		
	6.0	9.0	6.0	6.0	7.0	9.0	10.0	7.10		
	7.0	10.0	7.0	7.0	7.0	8.0	10.0	7.80		
	0.0	10.0	0.0	5.0	0.0	9.0	9.0	3.65		
	8.0	10.0	8.0	7.0	7.0	8.0	10.0	8.20		
	0.0	10.0	0.0	4.0	0.0	6.0	10.0	3.40		
	0.0	10.0	0.0	4.0	0.0	7.0	9.0	3.40		
	0.0	10.0	0.0	3.0	0.0	5.0	10.0	3.20		
	9.0	10.0	9.0	8.0	8.0	8.0	10.0	8.90	Yes	Yes
	0.0	10.0	0.0	4.0	0.0	6.0	9.0	3.35		
	0.0	10.0	0.0	3.0	0.0	4.0	10.0	3.15		
	7.0	10.0	7.0	6.0	7.0	7.0	10.0	7.60		
	8.0	10.0	8.0	7.0	8.0	8.0	10.0	8.35		
	0.0	0.0	0.0	4.0	4.0	3.0	9.0	1.80		
	9.0	10.0	7.0	8.0	8.0	8.0	10.0	8.60		
	7.0	10.0	7.0	7.0	7.0	5.0	10.0	7.65		
	7.0	9.0	6.0	7.0	7.0	7.0	10.0	7.40	Yes	No
	5.0	10.0	5.0	7.0	6.0	6.0	10.0	6.75		
	6.0	10.0	0.0	7.0	5.0	6.0	10.0	6.10		
	7.0	10.0	7.0	6.0	7.0	7.0	10.0	7.60		
	8.0	10.0	7.0	7.0	7.0	10.0	10.0	8.15		
	9.0	10.0	9.0	8.0	9.0	8.0	10.0	9.05	Yes	Yes
	7.0	9.0	7.0	6.0	7.0	5.0	10.0	7.30		
	5.0	9.0	0.0	6.0	3.0	6.0	10.0	5.20		
	7.0	10.0	8.0	6.0	7.0	7.0	10.0	7.75		
	5.0	10.0	4.0	5.0	4.0	5.0	10.0	5.95		
	6.0	10.0	5.0	5.0	5.0	6.0	10.0	6.55		
	0.0	10.0	0.0	2.0	0.0	5.0	10.0	3.05		
	7.0	10.0	8.0	8.0	8.0	7.0	10.0	8.20		
	9.0	9.0	9.0	8.0	8.0	8.0	10.0	8.70	Yes	Yes
	6.0	9.0	7.0	7.0	6.0	7.0	10.0	7.15		
	0.0	0.0	0.0	0.0	0.0	0.0	10.0	0.50		
	6.0	10.0	6.0	5.0	5.0	6.0	10.0	6.70		
	7.0	10.0	8.0	7.0	8.0	8.0	10.0	8.10		
	3.0	9.0	0.0	2.0	0.0	5.0	10.0	3.60		
	7.0	10.0	6.0	6.0	5.0	6.0	10.0	7.10		
	6.0	10.0	5.0	4.0	5.0	6.0	10.0	6.40		

Town of Prosper, TX

Town Manager Interview Schedule

Friday, January 6, 2023

Meet at Prosper City Hall Lobby - 250 W. First Street, Prosper, Texas 75078

Participating Team Members Meet at 8:30 a.m.

Time	*Town Tour/w Designated Town Staff (Meet @ Town Hall)	**Candidates Lunch/w Town Staff (PD Multi- Purpose Room)	***Presentation Exercise (Town Hall Council Chambers)	Town Council & Staff Presentation Debrief (Town Hall Council Chambers)	****Community Meet & Greet (Town Hall Lobby & Chambers)	*****Council End of Day Debrief (Town Hall Executive Conference Room)
9:00 a.m. - 11:15 a.m.	All Finalists					
11:15 a.m. - 11:30 a.m. Break						
11:30 a.m. - 12:30 p.m.		All Finalists				
12:30 p.m. - 1:00 p.m. Break						
1:00 p.m. - 2:00 p.m.			Finalist A			
2:15 p.m. - 3:15 p.m.			Finalist B			
3:15 p.m. - 3:30 p.m. Break						
3:30 p.m. - 4:30 p.m.			Finalist C			
4:45 p.m. - 5:45 p.m.			Finalist D			
5:45 p.m. - 6:15 p.m.				Staff, GPS		
6:30 p.m. - 8:00 p.m.					All Finalists	
8:00 p.m. - 8:30 p.m.						TC, GPS, ITM

NOTES: * Tour bus and routing planned by Robyn and team; Staff tour guides will be Stuart, Robyn and Hulon. (Bob to do a ride along only)

** Lunch provider / menu...**TBD**; Robyn has lead on coordination.

*** Presentation is to be 20 minutes plus Q&A time; Subject - "Describe the tools, actions and infrastructure required on the part of the Town to prepare the DNT commercial corridor for development."

***Presentations to be recorded by Leigh and posted with to TC SharePoint Site within each candidates folder; post not later than 6:00 p.m.

**** Invitation only; invitees list by TC; e-mail invite to be desinged by Communications team; **e-mail invite to go out NLT December 21st**; candidate spouses invited; use 4 high top tables in lobby (2) and chambers (2) for the candidates and let invitees move to each area to meet candidates.

*****Michelle - Post meeting with executive session for Town Manager search.

Hotel - OMNI @ The Star; Ron has called Marla for rate / reservation assistance.

Saturday, January 7, 2023

Meet at Prosper City Hall Lobby - 250 W. First Street, Prosper, Texas 75078

Participating Team Members Meet at 8:00 a.m.

Time	Meet/w Town Council (Town Hall Executive Conference Room)	Meet/w Interim Town Manager (Town Manager's Office)	*Candidates Lunch/w Town Council (Town Hall - Community Room)	**Council Interview Debrief (Town Hall Executive Conference Room)	
8:30 a.m. - 9:30 a.m.	Finalist A	Finalist D			
9:45 a.m. - 10:45 a.m.	Finalist B	Finalist A			Finalist A - [REDACTED]
11:00 a.m. - 12:15 p.m.	Finalist C	Finalist B			Finalist B - [REDACTED]
12:30 p.m. - 1:30 p.m.			All Finalists		Finalist C - [REDACTED]
2:00 p.m. - 3:00 p.m.	Finalist D	Finalist C			Finalist D - [REDACTED]
3:00 p.m. - 4:00 p.m.				TC, GPS, ITM	

NOTES: * Lunch provider / menu...**TBD**; Robyn has lead on lead on coordination.

**Michelle - Post meeting with executive session for Town Manager search.

Tuesday, January 10, 2023

Town Council Meeting - Selection of Town Manager

NOTES: Michelle - Post regular meeting with executive session for Town Manager search.

Have employment contract ready for review.

[REDACTED]

November 15, 2022

Mr. Bret Bauer
Co-Founder
Government Professional Solutions

Dear Mr. Bauer:

I am providing this letter and enclosed resume to show my interest in becoming the Town of Prosper Town Manager. I have over twenty-six years of progressive experience in city management, and I believe my background would be a positive fit for the Town of Prosper.

Currently, I am serving as the Nacogdoches City Manager and previously served for over three years as the Deputy City Manager in Denton, Texas and then over eight years as Deputy City Manager for the City of Coppell, Texas. From 2003 to 2009, I worked for the Town of Addison as the Assistant to the City Manager and then Assistant City Manager.

The following are excerpts of why I would be a good fit for Prosper:

- I currently serve as the City Manager in a diverse, full-service city of 33,000 residents that is the County seat and home to Stephen F. Austin State University (SFASU).
- The city budget is \$77 million, with 325 employees. Nacogdoches provides all city services including water, wastewater, and solid waste utilities and a general aviation airport with a flight school for SFASU.
- Prior to Nacogdoches, I served for 24 years in cities located in Dallas-Fort Worth. The most recent was with the City of Denton, which is a fast-growing, full-service, municipality of over 136,000 residents, 1700 employees, and \$1.2 billion operating and capital budget.
- My experience with economic development in fast-growing DFW and delivering excellent city services to a sophisticated and demanding citizenry.
- Years of experience working to bring reinvestment and activities to historic downtowns and working with Main Street and CVB groups.
- My expertise in capital planning and delivery with strategic planning for future growth.
- Working with several Mayors and City Councils over the years and having fostered a cohesive and positive Council-Manager-Staff rapport.
- My resourcefulness and collaboration with the business community, other cities, counties, school districts, universities, non-profits, Councils of Governments, transit authorities, and state agencies.
- Having an enjoyment and personal yearning for civic involvement and volunteerism.
- I deliver organizational excellence by building a city staff that responds with a sense of urgency, is solutions-oriented, is responsive to the City Council and resident's needs.

My philosophy is that municipal service delivery is customer-centric, while promoting a positive organizational culture that cares for each other and fosters professional and personal development.

The challenges cities face is enormous, the high-service demands, economic development growth, and infrastructure needs all with limited resources. I believe that my background working in close knit communities, my personality and work ethic, has prepared me to lead the Town of Prosper into the future.

Enclosed, you will find my resume so that you and the City Council can learn more about my background, work experiences, and qualifications. I welcome the opportunity to discuss further the Prosper Town Manager's position. Please do not hesitate to contact me at [REDACTED]. Thank you for your time and consideration.

[REDACTED]

[REDACTED]

[REDACTED]

SUMMARY OF QUALIFICATIONS

- A purposeful leader with over 26 years of service in municipal government, with twenty-two years of executive/senior leadership.
- An approachable and community-centered person with an emphasis on customer responsiveness.
- An open communicator that has developed an excellent rapport with Mayors & City Council Members, other government policymakers, community, and business leaders.
- Municipal government experience serving in areas including:
 - Budget/Finance -Policy implementation -Public/Private/Non-profit partnerships
 - HR/Employment relations -Parks & Recreation -Public Safety -Communications
 - Organizational leadership -Economic development -Strategic planning
 - Town & Gown relations -Planning & Development -Public Works/Utilities/Engineering
- Exceptional in a collaborative environment with an emphasis on leadership development and mentoring.
- Enjoys spending time with family, physical fitness, a foodie, travel, and music, all with a sense of humor.

PROFESSIONAL EXPERIENCE

CITY MANAGER

AUGUST 2020 - PRESENT

CITY OF NACOGDOCHES, TX (POPULATION 33,000)

- Serving as the Chief Executive Officer for a diverse, full-service organization with 325 employees, \$77 million annual budget.
- One of two City Council appointed employees.
- Provides the direction and leadership for all operational aspects of a complex organization.
- A change agent that develops a culture of excellence for residents, customers, business, and fellow employees.
- The final negotiator for economic development recruitments and retention projects.
- Redirected organization and resources towards City Council priorities and initiatives.
- Advanced the strategic review for long-term development for the city and historic downtown.
- Established an emphasis towards community connectedness and collaboration.

Key accomplishments:

- Directed the concept of establishing organizational core values.
- A fully integrated executive team with positive chemistry and shared leadership model with the CMO.
- Maximized City's financial resources towards re-staffing of key positions in Police, HR, Finance, Engineering, and Planning to enhance operations.
- Refocused resources towards the prioritization for infrastructure investment, neighborhood services, public safety, and quality of life.
- Increased sense of urgency on transparency in staff reporting, delivery of projects, increased citizen responsiveness, and service delivery.
- Negotiated Chapter 380 agreements for a new flight school at the Airport, new housing subdivision, and water park amenities.
- Re-established and fostered positive relationships with community partners: Stephen Austin State University, Nacogdoches ISD, TXDOT, Nacogdoches County, United Way, and Chamber of Commerce.
- Established listening and speaking tours to share city initiatives with the community and city employees.
- Directed the formulation of the City's first Capital Improvement Plan.
- Directed the initiation process for a Comprehensive Land Use Plan and Downtown Master Plan.
- Encouraged the initiation for private investment of downtown buildings and directed the support for evening and weekend entertainment activities.
- Maximized opportunities to re-establish special events with an emphasis towards community spirit and fun.

DEPUTY CITY MANAGER
ASSISTANT CITY MANAGER

APRIL 2019 – AUGUST 2020
MAY 2017 – APRIL 2019

CITY OF DENTON, TX (POPULATION 136,000):

Core Responsibilities include the following:

- Second in charge of a large, fast-growing, full-service, and diverse organization with approximately 1,700 employees and a \$1.2 Billion annual budget.
- Collaborated closely with City Council. Maximized a flow of communication between City Council, CMO, and operating departments.
- Supervised the Water/Wastewater Utilities, Solid Waste, Public Works, Engineering/Capital Projects, Fleet Services, Airport, and Transportation.
- Directed and assisted in the management and oversight of all operational aspects within the city.
- Strategized organizational needs to develop action plans to change organizational culture, enhance service delivery, and correct customer service deficiencies.
- Participated in economic development recruitment and negotiation efforts for major commercial and residential projects within the city.
- Served as the Staff liaison to City Boards and City Council Committees

Key accomplishments:

- Served as a lead in the City's COVID-19 Pandemic response.
- Served as a key participant in the city's largest General Obligation bond program (\$221M) in November 2019.
- Contributed as a negotiator in the city's largest economic development deal: Hunter & Cole Ranch
- Formulated a culture of accountability, customer service, transparency, and a sense of urgency for the city.
- Re-established and fostered positive relationships with key partners: University of North Texas, Texas Woman's University, Denton ISD, North Central Texas Council of Governments, TXDOT, and Denton County.
- Reformatted the Capital Improvement Program into a communicative, understandable, and accountable format.
- Led the negotiations for the Civil Service Meet & Confer agreement between the city and the Denton Police Officers Association.
- Negotiated professional contracts for engineering, architectural services, and pre-construction services.
- Established a Mid-Level Management Development Series that was co-facilitated by City Department Directors.
- Restructured departments to better serve citizens, eliminated duplicative efforts and outdated practices.
- Utilized business-based principles to recommend the elimination of unsustainable programs in Solid Waste.
- Established better relations with downtown businesses and new service delivery models.

DEPUTY CITY MANAGER

JANUARY 2009 – MAY 2017

CITY OF COPPELL, TX (POPULATION 40,000)

- Served as second in command of a medium-sized, diverse organization that comprises approximately 425 employees and a \$110 Million annual budget.
- Directed all City Departments which included: Human Resources, Engineering/Public Works, Parks & Recreation, Information Services, Finance, Police, Fire, Library, and Planning until July 2012. From July 2012 until May 2017 directed half of the organization with the hiring of a second Deputy City Manager.
- Led and participated in several quality of life and private development projects and efforts within the city.

Key accomplishments:

- Implemented and communicated the Coppel 2030 Vision goals and objectives.
- Advanced the city's re-imaging campaign through the Bold Vision/Big Impact Initiative.
- Resolved citizen complaints and other service issues.
- Collaborated for the successful deployment of a combined public safety dispatch system that serves the Metrocrest cities (NTECC).

- Implemented and deployed several enterprise-wide technology systems.
- Recruited and mentored executive-level employees.
- Recommended and implemented policy directives towards all city operations.
- Collaborated in the sales tax re-authorization referendums.
- Re-engineered the City's Information Technology Department.
- Assisted in the formulation of a combined public safety radio system and fire training facility.
- Spearheaded the City's *Living Well in Coppell* wellness initiative.
- Managed the contract transit services for seniors and disabled citizens.
- Oversaw the successful implementation of city facility and infrastructure construction projects.
- Directed the City's Annual Employee Conference.

ASSISTANT CITY MANAGER/CITY SECRETARY

OCTOBER 2006 TO JANUARY 2009

ASSISTANT TO THE CITY MANAGER

SEPTEMBER 2003 TO SEPTEMBER 2006

TOWN OF ADDISON, TX (POPULATION 15,000)

- Managed the Parks & Recreation, Visitor Services, Conference Centre, and Municipal Court Departments including the Town's top-rated Internship Program.
- Managed municipal elections, council agenda postings, minutes, and public information requests.
- Coordinated the Addison Citizens Advisory Committee process.
- Developed and managed the Town Manager's and City Council operating budgets.
- Acted as the staff liaison to the Dallas Area Rapid Transit (DART).
- Performed all legislative affairs for the Town.
- Responsible for the bi-annual Citizen Academy program.
- Project manager for public affairs campaign to secure passenger rail service into Addison.

ASSISTANT DIRECTOR – COMMUNITY SERVICES

JUNE 1999 – SEPTEMBER 2003

CITY OF HURST, TX (POPULATION 35,000)

- Reported to the Deputy City Manager.
- Oversaw the day-to-day functions within the Department.
- Prepared all staff reports for City Council, Library, Historical, and Park Boards.
- Developed and monitored the Community Services Department annual budget.
- Oversaw the Community Development 4B sales tax and miscellaneous project funds.
- Conducted project and contract management for departmental projects.

MANAGEMENT ANALYST

FEBRUARY 1998 TO MAY 1999

INTERIM PURCHASING MANAGER

OCTOBER 1997 TO FEBRUARY 1998

FLEET ANALYST

MARCH 1996 TO OCTOBER 1997

CITY OF CARROLLTON, TX (POPULATION 105,000)

- Coordinated entire City budget process.
- Conducted reports related to cost accounting, water/sewer rates, and cost of service studies.
- Supervised Purchasing Division staff and operations.
- Developed and managed equipment replacement schedule and coordinated equipment bid specifications and procurement and administered Alternative Fuels Program for compliance.

ADMINISTRATIVE INTERN

JANUARY 1995 – SEPTEMBER 1995

CITY OF LUFKIN, TX

- Conducted special projects for the City Manager's Office and other departments.

EDUCATION

PROFESSIONAL AND COMMUNITY ACTIVITIES

Professional Memberships:

- International City/County Management Association (ICMA)
- Texas City Management Association (TCMA)
- East Texas City Management Association (ETCMA)
- Texas Municipal League (TML)

Professional Activities:

- UMANT President (2002); Vice-President (2001); Treasurer (2000); Membership Co-Chair (1999)
- ICMA Workplace Diversity Conference Scholarship Recipient (2001)
- ICMA Emerging Leaders Task Force (2005)
- Graduate of the Senior Executive Institute (SEI) Program at the University of Virginia, July 2006
- ICMA Local Government Management Fellow, Board Member (2006-2019)
- Leadership ICMA Graduate, September 2007
- TCMA Committees: Public Relations, Membership, Mentoring, and Professional Development
- NTCMA At-Large Board Member (2005-07 and 2017-2019)
- 2012 Recipient of the UMANT Joy Sansom Mentor Award
- Participant in the Commandant's National Security Program at the US Army War College, July 2013
- Graduate of the North Texas Commission's Leadership North Texas Class VII
- 2016 Recipient of the Alumnus of the Year University of North Texas, Master of Public Administration

Community Involvement:

- Nacogdoches Rotary Club Member (2020-present)
- Nacogdoches Booster Club Member (2020-present)
- Nacogdoches Charitable Foundation (2021-present)
- Dallas ISD: Site-Based Committee: Anne Frank Elementary, DISD (2003-09)
- Coppell YMCA Board of Managers (2012 to 2017)
- Coppell Rotary Club Member (2010 to 2019)
 - Club Secretary (2012-13), President-Elect (2013-14), President (2014-15)
- Coppell ISD:
 - Mentor to students at Austin Elementary (2011 to 2017)
 - Facilities Visioning Committee: (2015)
 - School Bond Committee: (2015-2016)
 - Band Volunteer: (2016 to 2018)
 - Site-Based Committee: Coppell High School (2016-2018)
- University of North Texas
 - Public Administration Advisory Board (PAAB), Member (2010-2022)
 - Public Administration Advisory Board, Chair (2013-2016)
 - Latino Alumni Network Leadership Group (2019-present)

Candidate Questionnaire

Town Manager

Town of Prosper, Texas



Candidate Information

Full Name (First, Middle, Last):

[REDACTED]

Phone/Email Information

Cell: [REDACTED]

Nicknames:

N/A

Home: [REDACTED]

Email: [REDACTED]

Please answer each of the following questions completely and thoroughly.

1. How many employees and what size budget do you oversee?

There are 325 employees at the City of Nacogdoches.

The current budget size is a total of \$82,357,000.

(Operational funds: \$51,956,000; Capital \$30,401,000)

2. Please explain why you left your last three positions.

I left Addison to become the Deputy City Manager in Coppell. I left Coppell to become the Assistant City Manager in Denton. I left Denton to become the City Manager in Nacogdoches.

3. Are there any gaps in your employment history? *No, there are no gaps in my employment history.*

If so, please explain in detail. N/A.

4. What is your proudest professional accomplishment?

Becoming a first-time City Manager in Nacogdoches which is also the community of my undergraduate alma mater and where I chose to get into the city management profession.

5. Briefly describe your experience and skills in developing/maintaining community partnerships.

At every leadership position where I have worked, I have developed a good rapport with the local entities such as the school district, the County, the universities, and Chambers of Commerce. My approach is to learn who are the active groups to engage and reach out proactively to understand their mission, their names and faces, and stay connected. I join civic and business organizations, maintain active memberships, and serve in leadership roles. I serve on various community boards/committees, enjoy volunteering, and speak at events when called upon.

6. Briefly describe your experience and skills in economic and community development.

In Coppell, Denton, and Nacogdoches I have played an influential role in economic development and community development. Each of these communities had different funding structures for these efforts.

Coppell: We relied on sales tax rebates, tax abatements, and land banking for incentivizing economic development. We created a robust tax base as Coppell landed several high-profile businesses in the city. This increased the tax base significantly which leveraged the use of the 4B sales tax for crime control, street maintenance, and parks & recreation amenities. Coppell through the use of land banking created Old Town Coppell which is their version of a small downtown setting with Charleston style homes, a performing art center, a farmer's market, city facilities, a central park, cottage style businesses, and successful restaurants. The 4B sales tax was expanded to allow the full renovation and expansion of the city's park system for active and passive recreation use. I worked directly with the Billingsley Company in the formation and operation of the Cypress Water Municipal Management District which is a 940-acre master planned community of multi-family, retail, office, a lake amenity, and DART rail stop.

Denton: In Denton, we relied on sales tax rebates, tax abatements, tax increment financing (TIF), and impact fee credits for economic development. Staff also incorporated an expedited development review process where developers paid extra fees for a quicker turnaround. We worked closely with UNT and TWU on small area plans to ensure that adjacent neighborhoods were enhanced and protected from student traffic and parking. We boosted historic downtown Denton through the promotion of weekend and evening activities with pubs, restaurants, and the music scene. We worked collaboratively with business owners and the County on a Downtown Master Plan to plan for the future while respecting the historic characteristics of the area and adjacent neighborhoods. A downtown TIF was created to bank revenues for future capital projects which could include a parking garage.

The continual construction on Denton streets and other major roadways such as I-35, SH 380 required staff to work with TXDOT to ensure proactive messaging was clear and timely. As a result, businesses and commuters affected by construction could be informed of travel disruptions. An entire communications plan and team was created just for informing the public and businesses regarding construction. We facilitated a bond committee that reviewed and recommended projects to the City Council. In November 2019, the citizens of Denton overwhelmingly approved a \$221M bond program for street repairs, public safety facilities, and parks.

The city also embarked on a large economic development project by the combining of the Hunter and Cole Ranches into a 6500-acre master planned community. This involved the formation of a municipal management district (MMD) to ultimately build 15,000 single family homes, 5,000 multi-family units, 400 acres of commercial, and 100 acres of industrial developments. We negotiated land banking for the future expansion of city facilities, cash commitments from the developer held in escrow for their pro-rata share of building city facilities, open and recreational space for the public, and guaranteed impact fee rates for utility expansions.

Nacogdoches: In Nacogdoches, the city relies on an economic development fund that has accumulated monies from contributions from the General, Utilities, and Solid Waste funds. The City's economic development efforts are served by the Nacogdoches Economic Development Corporation (NEDCO). NEDCO's President and the City Manager work closely as they occupy office space in City Hall. Nacogdoches does not have a 4B sales tax.

During my time as the City Manager, we have revamped the economic development policies to make it more transparent and protect these funds from unrelated uses. The city negotiated a public private partnership for the creation of a new undergraduate degree aviation program between the city and the airport, with Stephen F. Austin State University, and HCH Aviation LLC to build a state-of-the-art hangar, purchase multiple planes, and a simulator. The city created a housing incentive program to encourage single family development by offering a rebate for each home built after the City issued the certificate of occupancy. The program is zero-risk to the city and designed to bridge the cost gap of public infrastructure that serves the development. The city renegotiated a past incentive agreement with a

water park operator to ensure that performance measures were incorporated to guarantee amenities are built as promised to the public. We are currently in three-way negotiations with a large land owner in the County to voluntarily annex so that a prospective industrial user can obtain city utilities for their future development. This development deal once completed will be a major contributor to the City's tax base and a large utility user.

Upon my arrival in late 2020, the staff has embarked on strategic community planning and investing in infrastructure for the future. The city is currently working on an update to the Comprehensive Land Use Plan and Downtown Master Plan. The Comp Plan scope is also comprised of an Interstate 69 corridor study and housing analysis. The Downtown Plan will ensure that the historic downtown is preserved while taking a critical look at housing, pedestrian access, landscaping, traffic flows, parking, lighting, and other infrastructure needs. The city is very fortunate to have the Hotel Fredonia, a full-service hotel, as an anchor in Downtown. The hotel has been successful from its complete renovation as a result of the Qualified Hotel Project incentive program that allows the city's portion of the hotel tax and the state's hotel tax and sales tax to be rebated to the hotel for a 10-year period.

Over the course of the last 18 months, the city created its first Capital Improvement Program that identified a full review of its capital needs for the next 10-12 years. The City Council held several dedicated workshops to review this material in preparation to address deferred infrastructure investments. The plan is a proposed General Obligation bond program in November 2023 and the issuance of revenue bonds in 2024.

7. Briefly describe your experience and skills in preparing, monitoring, and adhering to a budget.

My entire career in city management has involved working with the budget. In the executive roles I have had over the past 16 plus years, I have relied on the finance and/or budget staff to organize and coordinate the budget. We have established internal service funds to address fleet and other capital equipment needs. While budgeting is done on an annual basis, it is imperative to financially plan 3-5 years into the future. This demonstrates the long-term effects of decisions especially given the stringent revenue caps for cities.

Based on the priorities set by City Council, I work to ensure these are well communicated to the departments at the budget kickoff. The departments are informed of the nature of the revenue situation in advance as they prepare their budgets for the following year. The budget team, City Manager's Office, and departments collaborate on establishing the recommended budgets for the City Council. Council budget workshops are scheduled to allow departments to present a brief overview of the budget by sharing their goals and accomplishments, the issues facing the department, and next year's budget requests. This provides the Council a review of operations to ensure transparency and accountability of the departments.

Regarding the monitoring and adherence of the budget, the city has adopted a number of financial policies. While the City Manager has broad authority, I fully respect and adhere to these policies to ensure there is integrity in our systems and processes. For example, we will never fall below our 25% fund balance policy. In fact, I prefer to maintain extra cushion for contingency purposes. Budget to actual reports is reviewed monthly by Finance and available to the CMO and departments. If there is an outlier, the Finance Director will report it. On a quarterly basis the City Council is sent a recap of the budget and budget amendments are taken to City Council for their approval. All expenditure items taken before the City Council are scrutinized and approved by Finance prior to action being taken. The Annual Comprehensive Financial Report (ACFR) is completed in a timely manner with little to no management findings. The outside auditing firm will validate cash balances from bank records and financial reports.

In summary, my recommended budgets to City Council are balanced as we budget conservatively for revenues and budget aggressively for expenditures. We will live within our means, we maintain healthy reserves, and we do not use one-time monies for recurring expenditures and hope for the best.

8. Briefly describe your experience in providing written and verbal communication to employees and elected/appointed officials?

In my role as City Manager and past positions, I have presented quite often to a myriad of groups as a representative of the city. On a regular basis I send out written communications to our employees. As part of an employee newsletter, I write a "Manager's Message". I enjoy meeting with employees to share what is happening in the community and organization. I have a monthly Manager's meeting which is comprised of 25+ management staff for them to share about any ongoing issues and projects within their operations. As part of the recent Police Chief recruitment, I met with over 50 police department employees to seek their input on the attributes of a new chief. I personally met one on one with employees and surveyed them to get more specific feedback as well.

I meet privately with the Mayor and City Council to review any issues they may need addressing and/or provide them updates. I have extensive experience presenting items before City Council and do present on a regular basis depending on the matter. I speak regularly to community groups, civic organizations, and sit on panels representing the city. The City Manager's Office produces a weekly Friday Update which is a brief recap of recent activities for the week and an outlook for upcoming activities and events.

9. What do you feel are your greatest strengths as a public servant?

Problem solving skills and my quest to find workable solutions to issues.

I am a participatory manager.

I employ a shared leadership style.

10. What areas do you perceive you need to be working on to become a better leader?

I can be impatient at times.

I can lose sight to celebrate successes and mourn our losses.

I should try to have more fun at work and do need to let my guard down at times.

11. Describe your philosophy and approach to building a strong team environment?

As the new Town Manager, I would take the time to learn the organization and develop relationships across all levels. It is important to establish a rapport with the staff and develop a sense of trust.

I encourage an organizational culture that is servant minded, that exceeds expectations and delivers on its commitments. We establish core values and/or guiding principles (our non-negotiables) where everyone regardless of stature is treated with dignity and respect.

I want to be surrounded with people who have the aptitude to learn but more importantly have the positive attitude to serve others. I provide the team with the tools and resources to allow them to do their jobs well. This can be accomplished by taking the time to vision and to think strategically and broadly. Then work towards building the support systems to set the goals, objectives, and outcomes for success.

I am approachable and a good listener so others feel welcome to seek assistance and bring issues when they arise. I challenge people to make decisions and recommendations while also holding them accountable, and incorporate teachable moments when decisions do not go the right way.

Finally, I prefer to work in an environment where we as a group can get to know each other on a personal level. We would learn together and from each other through group book readings, attending trainings/seminars, and enjoying each other's company by socializing together during and after work hours. I enjoy fostering a mentor/mentee relationship as we all can learn from each other through our interactions and experiences.

12. Briefly describe the role of City/Town Manager's in this day in age?

Today's municipal organizations are very complex with many issues happening at once and subject matter experts on staff dealing with these issues. The Manager needs to be less technical and more conceptual with their skillset. The Manager needs to be adaptive to a constantly changing environment, as they seek input and options on difficult issues, and work to build consensus on competing interests in a political environment without being political. The Manager has to be a skilled communicator that tailors the message to resonate with their audience.

Also, in a small/medium size organization, the Town Manager is the culture leader by setting the tone for the organization. The Manager influences the organizational culture and how employees are treated and services are delivered to the community. If the tone set by the Manager is incongruent with culture of the organization, then there needs to be alignment or there could be difficult times ahead.

13. As a part of our overall application process, we may conduct social media, online presence, news, blogs, or similar inquiries or reviews, using Google or similar search engines. Is there any information you have not disclosed, addressed, in this or any other document relating to this search, or which you have not discussed, shared or disclosed with the GPS search consultant, that someone may construe as negative or consequential as it relates to the position for which you have applied?

No, there is nothing that I am aware of that has not been disclosed.

14. The established salary range for this position is \$230,000 - \$260,000, with a great benefit package. Do you have any concerns about agreeing to a salary in this range? *There are no concerns on my part.*

15. How did you hear about this position? (Please be specific)

I saw the posting in the ICMA weekly newsletter and contacted Mr. Bauer to inquire more information. Around the same time, I was contacted by colleagues in the DFW area about the posting. Before I considered applying, I did reach out to Bob Scott to hear more about the organization and he was very complimentary.

16. Have you interviewed, over the past six (6) months, with any other employers, or are you a finalist in any recruitment processes for similar position at this time? If yes, what is the status of any current search processes in which you are involved?

I was a finalist for the City Manager in Addison, Texas but was not named. I am not involved in any other searches.

Due Diligence Questionnaire

Town Manager

Town of Prosper, TX



Candidate Information

Full Name (First, Middle, Last): [REDACTED]	Phone Information
Nicknames: N/A	Cell: [REDACTED]
	Home: [REDACTED]
	Office: [REDACTED]

Please answer each of the following questions completely and thoroughly.

- Have you been subject to a formal charge regarding a conflict of interest, violation of ethical conduct, malfeasance, or misfeasance in the performance of duties? **No** If so, please explain the circumstances.
- Have you ever been the subject of an investigation, or censured by a grand jury, board of inquiry or similar body? **No**
If so, please provide details, explain the circumstances and final outcome.
- Have you been subject to any disciplinary actions, including suspension, probation, or demotion in your adult working career? **No**
If so, please provide relevant details, explain the circumstances and the final outcome.
- Has any organization, corporation, institution, or former employer dismissed, or asked you to resign for any reason, or from any position? **No** If so, please provide relevant details, and explain the circumstances. **N/A**
- If you have been in your current, or most recent organization, for less than two years, please describe why you are interested in a career move at this time? **N/A**
- Have you ever filed for bankruptcy, or taken similar adverse financial action, that may limit your ability to be in a position of fiduciary responsibility, including being bonded? **No**
- Is there anything, in your personal or professional background history that our Firm, an employer or citizen could possibly, or perceive, view, or interpret as factually or potentially embarrassing to anyone? **No**
Would, or could, this information impair your ability to perform the essential duties of this job if discovered at a later time? **No** If so, please explain, provide details of the circumstances and current disposition. **N/A**
- Please list all your social media outlets and the usernames for those social media outlets.
Facebook: [REDACTED]
Twitter: [REDACTED]
Snapchat: [REDACTED]

Instagram: [REDACTED]

LinkedIn: [REDACTED]

Pinterest: [REDACTED]

Nextdoor: [REDACTED]

Reddit: [REDACTED]

9. Do you understand that we may disqualify your candidacy from this search if valid, verifiable, and reliable information emerges, contrary to any information you provide us during this process? **Yes**



www.sfasu.edu

Leading the way: Career in city management brings ██████ back to Nac

When ██████ walked the SFA commencement stage in 1995, he had a small U-Haul trailer packed and connected to his Chevy Blazer, and he was ready to drive back to the DFW area and begin his career. He wasn't sure he would ever return to Nacogdoches, but he was positive about the career he wanted to pursue.

"As a 20 year old, I knew I wanted to work in city management," ██████ said.

██████ confidence was based on his interactions with Dr. Richard Herzog, an SFA faculty member who encouraged him to consider a career in public administration and introduced him to the Lufkin city manager in neighboring Angelina County.

██████ went on to work for several Texas cities, including Denton, Coppell, Addison, Hurst and Carrollton. He earned a master's degree in public administration from the University of North Texas and became involved in professional organizations that include the International City/County Management Association and the Texas City Management Association. And, in the midst of a pandemic, he returned to Nacogdoches as city manager in August 2020.

"Coming back to Nacogdoches has been so rewarding," ██████ said. "I was excited and humbled that the city council had the confidence to appoint me as city manager. Everyone I have met has been friendly and extremely supportive. I am proud of what has been accomplished in our community and on campus during the past 25 years. It has blown me away."

In addition to his academic coursework, ██████ said his participation in the Student Activities Association served as valuable career preparation.

"Having a leadership position during my junior and senior years allowed me to work with fellow students and faculty members to coordinate bringing concerts and other entertainment options to campus," he explained. "The opportunities taught me the collaborative nature of working with other employees and volunteers to meet expectations and execute a successful event."

██████ said the challenges cities face are enormous, with high service-delivery demands and minimal and declining resources. But the day-to-day stresses of the job prepared him well for his first months in Nacogdoches, when in addition to the COVID-19 pandemic, he led the city through hurricane preparation in August and two of the largest winter-weather events in recorded history.

"Regardless of how much you plan, each day is never the same," he said. "We have emergency plans in place to deal with inclement weather, and with Hurricane Laura and the snowfalls and winter storms."

However, ██████ said COVID-19 was a different story.

"Through the devastation of the pandemic, we've learned that good and effective leadership is vital in making it through tough times," he said. "Local governments have finite resources, so working across jurisdictional boundaries is imperative when budgets are squeezed and resources evaporate. The role of the city manager is

to be flexible in approach, clear hurdles, advocate for resources, create avenues for communication and get out of the way so that the subject matter experts can do their jobs. Along the way, the manager should be encouraging and motivating to an exhausted staff, because all of this work is in addition to everyone's normal duties. I can't imagine myself in any other career."

Once again [REDACTED] is using the skills he learned at SFA to ensure that the city, the university, the Nacogdoches Independent School District and Nacogdoches County bring collaboration to a new level to accomplish goals that may previously have seemed out of reach.

"The leaders of each of these entities are meeting regularly and have formed great friendships," he said. "We have set a positive tone and will work together to better our community. I have no doubt that, as a group, we can accomplish so much more than we could on our own."

One of those goals in 2021 is to bring back, within the safe parameters of health guidelines, many of the special events and festivals for which Nacogdoches is known.

"I know many people are ready to get out and travel again, so I encourage alumni to come and see what is going on in Nacogdoches and the exciting changes that are happening on the SFA campus. That charm and hospitality of our community has never been more appealing."

YouTube Links for



-
1. 






CHRIS LOWE

J.D., M.P.A.

Partner and Co-Founder

SUMMARY

Chris Lowe is a dynamic leader and creative problem-solver with a deep affinity for public service. He draws upon 15 years of experience in city management and over 20 years in the public sector to help guide public clients through myriad opportunities and challenges, from economic development and funding, to human resources and utility management.

EDUCATION

Juris Doctor, Marquette University, Milwaukee, WI

Master of Public Administration (MPA), Bowie State University, Bowie, MD

Bachelor of Arts, Political Science and Government, University of Kansas, Lawrence, KS

CONTACT

(785) 766-9104

clowe@governmentpros.com

LINKEDIN:

<https://www.linkedin.com/in/chris-lowe-823bb4173/>

ASSOCIATIONS

International City/County Manager's Association (ICMA)
Government Finance Officers Association (GFOA)

SPECIFIC EXPERIENCE

Executive Recruitment & Human Resources

- Personally recruited and hired more than 50 employees, including executives and department heads
- Conducted classification and compensation studies
- Developed and implemented performance measurement programs
- Developed and implemented compliant personnel policies, procedures manuals, and employee handbooks
- Negotiated collective bargaining agreements with unions

Budgeting & Finance

- Developed and managed more than \$75 million in municipality annual budgets
- Supervised competitive bond sales to finance public infrastructure improvements
- Led efforts to refinance bonded indebtedness, saving millions in debt service
- Created and implemented accounting manuals and investment policies

Community Strategic Planning

- Created full scope community strategic plans
- Conducted council retreats with goal setting priorities
- Led extensive community engagement efforts
- Conducted numerous stakeholder interviews

Economic Development

- Developed public private partnerships and negotiated economic development agreements, resulting in new community services, financial savings, and local business expansion
- Secured grant funding for various community improvements, from city lighting to transportation infrastructure
- Administered multi-million capital improvement programs



BRET BAUER

M.P.A.

Partner and Co-Founder

SUMMARY

Bret Bauer brings more than 15 years of public sector experience and best practices to his work with public clients. Serving in city management roles in Missouri, Kansas and Texas gave Bret significant experience in utility and budget management, human resources, and economic and community development. Bret's ethics and integrity have also earned him widespread recognition and trust.

EDUCATION

**Master of Public Administration (MPA),
Bachelor of Science, Criminal Justice**
Wichita State University, Wichita, KS

CONTACT

(316) 207-0688

bbauer@governmentpros.com

LINKEDIN:

<https://www.linkedin.com/in/bret-bauer-mpa-icma-cm-b89ab3b3/>

ASSOCIATIONS

International City/County Manager's Association (ICMA)
Government Finance Officers Association (GFOA)
Texas City Managers Association (TCMA), Ethics Committee 2019-2020, Membership Committee 2017-2019
East Texas City Managers Association (ETCMA), Board VP 2019-2020

SPECIFIC EXPERIENCE

Executive Recruitment & Human Resources

- Personally recruited and hired more than 25 employees, including executives and department heads
- Conducted classification and compensation studies
- Developed and managed training exercises for county staff and residents on emergency preparedness and the National Incident Management System
- Conducted ethics training

Budgeting & Finance

- Managed multi-million-dollar municipal budgets, both departmental and annual
- Developed capital improvement programs and strategic plans
- Managed and oversaw payroll processes

Community Strategic Planning

- Created full scope community strategic plans
- Led extensive community engagement efforts
- Conducted multiple stakeholder interviews
- Conducted council retreats with goal setting priorities

Economic & Community Development

- Led numerous economic development successes in new development and redevelopment
- Led successful negotiations with developers

Project & Program Management

- Managed and oversaw Public Works and Parks Departments
- Streamlined departments to operate more efficiently and effectively, including a Build/Code Enforcement department

Utility Management

- Developed, maintained, and managed National Pollutant Discharge Elimination System permits
- Recommended to serve on the Kansas Municipal Energy Agency



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
06/14/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER SECURITY SERVICE INSURANCE/PHS 65815020 The Hartford Business Service Center 3600 Wiseman Blvd San Antonio, TX 78251	CONTACT NAME: PHONE (866) 467-8730 (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS:
INSURED Government Professional Solutions, LLC 104 HARBOR HAVEN ST GUN BARREL CITY TX 75156-4319	INSURER(S) AFFORDING COVERAGE INSURER A : Hartford Underwriters Insurance Company INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/Y YYY)	LIMITS
A	COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR ☒ General Liability			65 SBA AG7X1Y	07/13/2024	07/13/2025	EACH OCCURRENCE \$1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC OTHER:	DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000					
		MED EXP (Any one person) \$10,000					
		PERSONAL & ADV INJURY \$1,000,000					
		GENERAL AGGREGATE \$2,000,000					
						PRODUCTS - COMP/OP AGG \$2,000,000	
A	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ ALL OWNED AUTOS ☒ HIRED AUTOS ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS			65 SBA AG7X1Y	07/13/2024	07/13/2025	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000
		BODILY INJURY (Per person)					
		BODILY INJURY (Per accident)					
		PROPERTY DAMAGE (Per accident)					
A	☒ UMBRELLA LIAB ☒ EXCESS LIAB ☐ DED ☐ RETENTION \$ 10,000			65 SBA AG7X1Y	07/13/2024	07/13/2025	EACH OCCURRENCE \$1,000,000
		AGGREGATE \$1,000,000					
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N ☐	N/A	65 SBA AG7X1Y	07/13/2024	07/13/2025	☐ PER STATUTE ☐ OTH-ER
		E.L. EACH ACCIDENT					
		E.L. DISEASE - EA EMPLOYEE					
		E.L. DISEASE - POLICY LIMIT					
A	Professional Liability			65 SBA AG7X1Y	07/13/2024	07/13/2025	Each Claim Limit \$100,000 Aggregate Limit \$100,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Those usual to the Insured's Operations.

CERTIFICATE HOLDERFor Informational Purposes
104 HARBOR HAVEN ST
GUN BARREL CITY TX 75156-4319**CANCELLATION**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Susan L. Castaneda

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Public Works Director Executive Search Proposal

Public Administration Associates, LLC





Public Administration Associates

Public Administration Associates

1155 W. South Street

Whitewater, WI 53190

262.903.9509

www.public-administration.com

kevin.brunner1013@gmail.com

December 8, 2024

City Manager Rebecca Houseman
City of Fort Atkinson
Municipal Building
101 N. Main Street
Fort Atkinson, WI 53538

Dear City Manager Houseman,

Pursuant to your request, I am herewith submitting a proposal to assist the City of Fort Atkinson in the recruitment / selection of a new Public Works Director. Public Administration Associates (PAA) has worked with over 200 different Wisconsin municipalities on the executive recruitment/selection of their chief administrative officers and department directors. We would be quite honored and privileged to work again with Fort Atkinson on this important executive search. In the last two years, we have assisted the cities of Jefferson, Menomonie, Ripon and Shawano as well as the villages of Bellevue, Germantown and Menomonee Falls on the searches for their next public works directors, so we are very familiar with and attuned to this particular department director position in Wisconsin and its municipal market dynamics.

Since 1998, Public Administration Associates (PAA) has conducted over 450 executive searches for Wisconsin communities. What follows is information about our company and the assistance that we would bring to the City. Please feel free to visit our website at www.public-administration.com.

We really appreciate our past association with the City of Fort Atkinson. We believe that we can add significant value to the search for a new Fort Atkinson Public Works Director; by including PAA Associate Bruce Stelzner as one of our consultants and I will team with Mr. Stelzner and be the City's chief point of contact with PAA. We have worked together on our most recent DPW Director searches and both of us are former public works directors.

Thank you for your consideration.

Sincerely,

Kevin M. Brunner

Kevin M. Brunner, President



Public Administration Associates

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1. About Public Administration Associates

SINCE 1998

Taking Local Government
to New Heights...

Public Administration Associates, LLC (PAA) is recognized among the most trusted, skilled and effective local government consultants in Wisconsin and the Midwest. Our consultants are highly skilled practitioners who get the job done through unparalleled commitment to public service, the highest standards of service to its clients and the efficient use of client time and resources. PAA has built a sterling reputation earned from 20 plus years of municipal consulting and a combined 300+ years of public management experience.

Next Generation of PAA Leadership

PAA was organized in April 1998 by partners William Frueh, Denise Frueh, and Dr. Stephen Hintz. Kevin Brunner is now President of PAA and the Fruehs and Hintz are PAA Associates along with approximately twelve other local government professionals who are affiliated with PAA and work on a project-to-project basis. In 2020, Kevin Brunner was joined by David Bretl and Christopher Swartz as partners of the firm. Brunner currently serves as the firm's president while Bretl serves as vice-president and Swartz as its secretary/treasurer.





Kevin Brunner

President/Partner

Kevin Brunner has over thirty-five years of experience in serving Wisconsin local governments. He served as the manager/administrator in Saukville, Monona, De Pere, and Whitewater and worked as an assistant administrator for the City of Appleton and Kenosha County. He retired from public service as the Director of Central Services/Public Works for Walworth County. Brunner was the recipient of the 2007 Wisconsin City/County Manager of the Year and 2012 Service Innovation awards, both from the Wisconsin City/County Management Association (WCMA). Brunner is a past president of the WCMA and served on the League of Wisconsin Municipalities and Alliance of Cities Boards of Directors. He received his BA in Political Science and Criminal Justice from Carthage College (Magna Cum Laude and Rhodes Scholar Nominee); MPA from Michigan State University and is a graduate of the University of Virginia Senior Executive Institute. He achieved credentialed manager (ICMA-CM) status from the International City/County Management Association during his city management career. He has served on numerous public and non-profit boards and is currently chair of the Geneva Lake Conservancy. Brunner has been actively consulting since 2014.



David Bretl

Vice President/Partner

David Bretl has as served local governments in Wisconsin for the past twenty-nine years. He retired in early 2020 from his position as County Administrator and Corporation Counsel for Walworth County, a combined position that he held since 2003. He has joined PAA as a partner in January 2020 but has been working as a consultant with the firm since 2018. During his eighteen years at Walworth County, Dave was involved in the two board downsizings, the replacement of most of the County's facilities and the consolidation of six departments. Dave has moderated the county's Intergovernmental Cooperation Council (a collaborative effort among municipal,

county and town governments) since 2008 and serves as an advisor to Leadership Walworth, a program designed to develop public, non-profit, and private sector leaders. In 2005 he helped organize a county-wide private-public economic development initiative, WCEDA (Walworth County Economic Development Alliance, Inc.). In 2015 that organization honored him by establishing the Dave Bretl Community Betterment Award.

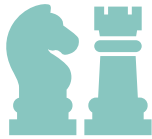


Chris Swartz

Secretary-Treasurer/Partner

Chris Swartz has served as a municipal manager in Wisconsin for over 30 years, most recently as Village Manager for the Village of Shorewood (2004-2017), Administrator for the Village of Sussex (1990-2004) and Clerk-Treasurer Administrative Coordinator Village of East Troy (1986-1990). He started his career as a researcher for the Citizens Governmental Research Bureau/Public Policy Forum (1983-1985). He retired from Shorewood in 2017 as a credentialed manager as designated by the International City Management Association ICMA). Swartz has a Master of Science degree in Urban Affairs from the University of Wisconsin-Milwaukee (1983) and an undergraduate degree from University of Wisconsin-Stevens Point. Swartz has been recognized for his innovative approach to economic development, strategic and financial planning, organizational development and intergovernmental cooperation. He is known as a mentor to emerging public administration leaders through his tenure as an adjunct professor within the Masters of Public Administration (MPA) graduate program at the University of Wisconsin-Milwaukee. Swartz has been formally recognized for his lifetime achievements, including Wisconsin City/County Management Association "Meritorious Service Award" (2015), James R. Ryan Lifetime Achievement Award from the Public Policy Forum (2017) and Wisconsin Economic Development Association Fredrick C. Pearce Lifetime Achievement award (2017).

Comprehensive Government Consulting Services



Executive Recruitment

Assisting municipalities in the recruitment and selection of management personnel including managers, administrators and department/division heads.



Interim Management Services

Providing skilled and experienced administrators on a full-time or part-time basis for a limited period of time.



Organization & Management Studies

Analyzing municipal organizations, operations, and management structure and procedures using best practice standards. Specializing in organizational assessments, public works, and public safety.



Classification & Compensation Studies

Analyzing and developing of classification and compensation plans using internal and external equity standards.



Economic Development Services

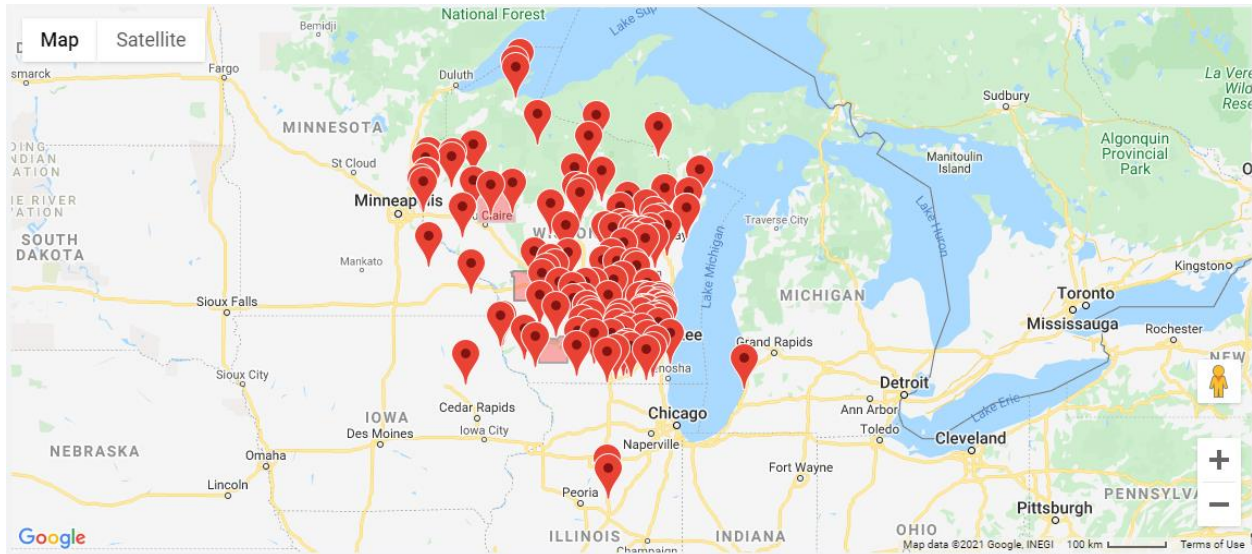
Assisting communities establish and implement economic development projects and programs, including downtown revitalization initiatives, redevelopment and tax incremental financing, business improvement district plans, brownfields initiatives, and business and industrial park planning and development.



Strategic Planning & Implementation

Performing community needs assessments, preparation of plans, strategies for implementation of community plans, site planning/development review assistance, and assisting communities in development of boundary agreements and cooperative plans.

PAA Executive Recruitment Clients



Over 400 Municipal Administrator Searches Since 1998

The number beside the municipality name is the number of times PAA has assisted the municipality. State of Wisconsin unless otherwise noted. View the [interactive map](#) on our website for the work that we have performed for these communities.

Cities

Abbotsford (2)	Elkhorn	Marquette, IA	Park Falls(2)
Adams (2)	Elroy (3)	Marshfield (2)	Pine Island, MN
Algoma	Evansville (3)	Mauston (3)	Platteville (5)
Amery	Fond du Lac	Menominee, MI	Prairie du Chien (2)
Antigo (4)	Fort Atkinson (2)	Menomonie (2)	Princeton (2)
Ashland (2)	Fox Lake (3)	Mequon	Portage
Baraboo (3)	Franklin	Menasha	Port Washington (2)
Berlin (3)	Geneseo, IL	Merrill	Racine
Brillion	Glendale	Middleton (2)	Reedsburg (2)
Chilton (2)	Hartford	Milton (2)	Rhineland
Chippewa Falls (2)	Hillsboro (3)	Mineral Point	Rice Lake
Clintonville (2)	Horicon (2)	Minonk, IL (3)	Richland Center
Columbus (5)	Hudson(3)	Monona (3)	Ripon (3)
Crystal River, FL	Independence, IA	Monroe (3)	Shawano (5)
Cudahy	Jefferson (5)	New Holstein	South Haven, MI
Delavan (2)	Kewaunee	New Lisbon	St. Croix Falls
DePere (3)	Lake Elmo, MN	New London (3)	St. Francis
Durand (3)	Lake Geneva (2)	Niagara	Sturgeon Bay (5)
Eagle River	Lake Mills	Oak Park Heights, MN	Thorp
El Paso, IL	Lancaster (4)	Oconto (2)	Tomah (2)
	Marinette (2)	Omro (2)	Two Rivers

Verona (3)
Washburn (3)
Waukesha
Waupaca
Waupun (2)
Wautoma
Wauwatosa (2)
Weyauwega (3)
Whitewater (3)

Villages

Allouez (2)
Ashwaubenon
Bayside (3)
Bellevue (2)
Belleville(3)
Black Earth
Bonduel
Brown Deer
Clinton (2)
Colfax
Cross Plains (2)
Darien
Deerfield(2)
DeForest (2)
Denmark (2)
East Troy
Edgar
Egg Harbor (2)
Elkhart Lake
Elm Grove
Ephraim
Fox Point (2)
Germantown(2)

Grafton (2)
Greendale (2)
Greenville
Hales Corners
Hammond
Hartland (3)
Howard (3)
Johnson Creek (3)
Kewaskum
Lisbon
Little Chute (5)
Lodi (3)
Marathon City
Marshall (3)
Maple Bluff
McFarland (2)
Menomonee Falls
Merton
New Glarus (4)
North Fond du Lac (3)
Oregon (2)
Osceola (4)
Paddock Lake (2)
Palmyra
Pardeeville
Pewaukee
Port Edwards
Poynette
Prairie du Sac
Pulaski
Rothschild (2)
Sherwood
Shorewood Hills (3)
Slinger (2)
Somerset
Spring Green

Suamico (3)
Stanley
Sussex
Thiensville (2)
Turtle Lake
Twin Lakes (2)
Union Grove (2)
Vernon
Waterford
Waunakee
W. Milwaukee (3)
Weston

Williams Bay (2)
Wind Point (4)
Winneconne (4)
Whitefish Bay (3)
Wrightstown (3)

Towns

Algoma (4)
Beloit
Buchanan (5)
Cedarburg (2)
Clayton
Empire
Fox Crossing (Menasha)
(4)
Gibraltar (2)
Grand Chute (4)
Greenville (2)
La Pointe (3)
Lawrence (2)
Ledgeview
Little Suamico
Linn

Lisbon
Oconto
Osceola
Rib Mountain
Richfield (2)
Sevastopol
Troy(2)
Washington
Weston

Counties

Ashland
Chippewa (3)
Dodge (2)
Door
Grant
Green Lake (2)
Kewaunee
Iowa
Monroe
Oconto (2)
Pepin
Polk (3)
Price
Richland
Sauk
Sawyer
Shawano
Trempeleau
Vernon
Wabasha, MN (2)
Washburn (2)
Waushara

2. PAA Consultants (Associates)



Dr. Stephen Hintz - Associate

Associate Stephen Hintz served on the faculty of the University of Wisconsin Oshkosh from 1972 to 2001 where he taught personnel, budgeting, and municipal management in the Master of Public Administration program. For twenty years, he served as executive secretary of the Wisconsin City/County Management Association. Hintz holds a Ph.D. in political science from Yale University. He has been consulting with municipalities on recruitment and management issues since 1980. In 1998, Hintz was elected to the Oshkosh Common Council and was the Mayor of Oshkosh from 2002 to 2004. In 2001, he received the prestigious Sweeney Academic Award from the International City/County Management Association for his lifelong work in promoting public administration.

Dr. Hintz works on executive recruitment and general management studies for PAA.



William Frueh - Associate

Associate William Frueh has served local and state governments since 1962, as a City Manager in Council Bluffs, Iowa; Newton, New Jersey; Shawnee, Oklahoma and retired in 1996 after 20 years as the city manager of Oshkosh, Wisconsin. He also served as the Director of Economic and Community Affairs for the State of Oklahoma. Oshkosh Citizens and the Oshkosh Northwestern newspaper named Frueh as one of the ten people in Oshkosh who most influenced the development of Oshkosh during the twentieth century. Frueh received his bachelor's degree in Civil Engineering from Iowa State University and has experience as a City Engineer and Public Works Director. He has been actively consulting since 1996 and is a Life Member of both the International City/County Management Association and WCMA.

Mr. Frueh works on executive recruitment and public works-related management studies for PAA.



Denise Frueh - Business Manager/Associate

Denise Frueh received both her bachelor's and master's degrees in Business Administration from the University of Wisconsin. She has over 20 years of experience in serving municipal governments, as Deputy Assessor for the City of Oshkosh, WI and as a consultant to local governments. In addition to serving as the business manager for Public Administration Associates, she has been actively consulting since 1996 on numerous executive searches and administrative studies for Midwest municipalities in Wisconsin, Illinois, Minnesota and Iowa.



Dave Tebo – Associate

Dave Tebo served as a Municipal Administrator in Wisconsin for 25 years, most recently in the Village of Poynette (1994-2000) and Town of Greenville (2000-2017). Tebo has a master's degree in Public Affairs & Administration from UW-Madison and a bachelor's in Urban & Regional Studies from UW-Oshkosh. Dave is a Credentialed Manager (CM) by the International City Management Association (ICMA) and Certified Public Manager (CPM) by the State of Wisconsin. He is experienced in all local government management duties including: budgeting, financial analysis, human resources, community development, planning and economic development. Project areas that Dave had in-depth experience and success with in Greenville include: Land Use Planning, Sustainability, Land Stewardship (Creation of Two DATCP recognized Agricultural Enterprise Areas), Grant writing for Trail Construction and Administration (\$3 million in trail projects over the last 15 years), and Economic Development (TID Development and work with Fox Cities Regional Partnership). Tebo's work in Greenville was featured in the book *The New Public Service-Serving, Not Steering* by Janet and Robert Denhardt in 2007.

Mr. Tebo works on interim management assignments, executive recruitment and classification/compensation studies for PAA.



Shawn Murphy – Associate

Shawn Murphy has held positions in state and local government for over 30 years with 26 years' experience as a Municipal Administrator. After obtaining his Bachelor Degree in Business Administration from the University of Wisconsin-Eau Claire in 1986 and Master's Degree in Public Administration from the University of Wisconsin-Milwaukee in 1990, Murphy began his career as a Budget & Program Coordinator for the Wisconsin Department of Transportation. Murphy served as Assistant Village Manager in Whitefish Bay from 1992-1997; Village Administrator in Prairie du Sac from 1997 to 2007; City Administrator in Verona from 2007 to 2010 and City Administrator in Portage from 2012 to 2023. Murphy has a strong track record of collaboration and was involved in the formation of the North Shore Fire Department, the reformation of a joint Police Department between Prairie du Sac and Sauk City; worked closely with the Sauk Prairie School District to create the Sauk Prairie Recreation Commission that includes 6 municipalities and was involved in the creation of a joint municipal court commission that includes 4 municipalities. Murphy was an active member of the Wisconsin City/County Managers Association (WCMA) and the International City Manager's Association serving on numerous committees. In 2023 Murphy received a lifetime achievement award from the WCMA.

Murphy works on interim management assignments and executive recruitment projects for PAA.



Sue McDade – Associate

Sue McDade has over 30 years of experience as a local government recreation and facilities administrator. She is currently the Community Services Director in Waunakee, Wisconsin, a fast-growing north Madison suburb. Responsibilities include recreational programming, supervision of the community center (including a fitness center, gymnasium, community room and senior center), and development of the park system, currently consisting of over 200 acres of park land. McDade obtained a master's degree in Recreation and Park Administration from Penn State University. She is a past president of the Wisconsin Park and Recreation Association (WPRA), serving from 2014-2016. She is the recipient of numerous Wisconsin and regional honors and awards, including the prestigious WPRA Professional Award of Merit in 2010. McDade teaches courses in the Recreation Management Program at Madison Area Technical College.

Ms. McDade works on executive recruitment and park and recreation-related management studies for PAA.



Anthony Brown - Associate

Anthony Brown is the current City Administrator for the City of Port Washington, WI. Anthony has over a decade worth of experience serving Wisconsin local governments. He has served in different municipal management capacities in southeast Wisconsin and the Fox Valley. Mr. Brown is recognized as a functional, hands-on servant leader, who believes in empowering employees to become leaders. He is experienced in all local government management duties including budgeting, financial management, human resources, community and economic development, strategic planning, and performance management. Anthony has a master's degree in Public Administration with an emphasis on municipal management and a Bachelor of Arts in Political Science with an emphasis on law studies from the University of Wisconsin-Milwaukee. In addition, Anthony has sought additional educational opportunities by graduating from the Government Finance Officers Association (GFOA) Budget Academy, obtaining his Lean Six Sigma Yellow and Green Belt Certification, and getting accredited through the Congress for New Urbanism (CNU).

Brown works on executive search and general consulting projects for PAA.

Tim Franz - Associate

Timothy Franz is the retired fire chief of the Oshkosh Fire Department and has been in the fire service for over 30 years. Franz has an associate's degree in fire protection from Fox Valley Technical College and a bachelor's degree in fire science from the University of Cincinnati. He also is a graduate of the National Fire Academy Executive Fire Officer Program. Franz is a past president of the Wisconsin State Fire Chiefs' Association and has served as a consultant on various fire and emergency management studies. Recently, he has worked on the Fire/EMS studies for Verona,



Sevastopol, Door County, Buchanan, five Oconto County Townships, Little Chute, Platteville, Sturgeon Bay and Park Falls with PAA.

Franz works on Fire/EMS-related studies and Fire Chief executive search projects as well as Fire/EMS compliance audits for PAA.



James Austad - Associate

James Austad is an instructor in the Fire Protection Program at Fox Valley Technical College. He is a 28-year veteran of the fire service, spending 22 years with the Oshkosh Fire Department. He was the battalion chief in charge of the emergency medical services division of the Oshkosh Fire Department. Austad received an associate's degree in fire protection from Fox Valley Technical College, a bachelor's degree in business management from Silver Lake College, and a master's degree in public administration from the University of Wisconsin Oshkosh. He also is a graduate of the National Fire Academy Executive Officer Program. Austad has recently worked on the PAA Fire/EMS Studies for Sevastopol, Door County, Buchanan, Oconto Township, Sturgeon Bay, Little Chute, Platteville and Park Falls.

Austad works on Fire/EMS-related studies and Fire Chief executive search projects as well as Fire/EMS compliance audits for PAA.



Darrell Hofland - Associate

Darrell Hofland has 35 years of municipal management experience in Wisconsin, most recently as City Administrator for Sheboygan (2016-2020), Village Administrator for Grafton (1990-2016), Village Administrator for Little Chute (1986-1990), and Administrative Assistant to the Mayor for Appleton (1985-1986). Mr. Hofland was the first recipient of the Meritorious Service Award in 2000 by the Wisconsin City/County Management Association and Wisconsin's first Credentialed Manager by the International City/County Management Association. He is experienced in all local government management duties including budgeting, financial management, human resources, community and economic development, strategic planning, and performance management. His academic credentials include attainment of a Master's Degree in Public Administration from American University with a concentration in Financial Management and a Bachelor of Arts Degree in Political Science and Psychology from University of Iowa. He is also a graduate of the Senior Executive Institute of the University of Virginia's Weldon Cooper Center for Public Service.

Hofland works on executive recruitment, interim management assignments and municipal strategic planning projects for PAA.



Dr. Mamadou Coulibaly - Associate

Associate Dr. Mamadou Coulibaly is a specialist in the application of Geographic Information Systems (GIS). Coulibaly is an Associate Professor of Geography at the University of Wisconsin-Oshkosh where he teaches and conducts research on information processing, data analysis, mapping, and solutions to environmental and socioeconomic problems. He received his Ph.D. from the Southern Illinois University at Carbondale in 2004. Coulibaly has worked on mapping for PAA on a number of Fire/EMS Studies including Lodi, Little Chute, Platteville and Park Falls.

Dr. Coulibaly works on a wide variety of management studies for PAA.



Bruce Stelzner – Associate

Bruce Stelzner has over 30 years of experience in Wisconsin local government. Stelzner has served as a County Highway Commissioner, Public Works Superintendent and Business Park Administrator. His responsibilities have included administration, management, design, and construction of public works/ utilities; highways and bridges; public infrastructure, personnel management, asset management, fleet management, building and grounds management. Stelzner has served as the State Director for the National Association of County Engineers and President of the Wisconsin County Highway Association. Stelzner has served as the Chairman, Co-Chair or member of many national, State, and Local committees including the NACo Transportation Steering Committee, FHWA State Transportation Innovation Council, Wisconsin Regional Planning/MPO, Wisconsin Local Roads and Streets Council and many other boards and commissions.

Stelzner works on interim management assignments and public works-related management studies for PAA.

3. PAA's Approach to Executive Recruitment

Our primary objectives are (1) to attract the highest number of professionally qualified, experienced and diverse applicants and (2) to facilitate a selection process that is thorough, professional and timely, resulting in the selection of the candidate who best meets the requirements of the City.

We believe that the City Manager, appropriate City Council members and key City staff should be actively involved in the selection process at all stages of the process and that our primary role is to provide progressively more detailed information about candidates to assist the City Manager and others in selecting semi-finalists, finalists, and the final choice. While we certainly review applicants very carefully, it is not our role to select final candidates.

We believe that the process consists both of recruiting—the City officials involved will be actively selling themselves to potential candidates—and selecting—the City Manager, City Council members and City reviewing applicants for the best possible choice. Too often municipalities only consider the selection part.

We believe that the City staff has a large stake in the process. We recommend that department heads and other staff have an opportunity to meet and talk with each of the finalists. However, we fully recognize that the final decision rests with the City Manager and/or City Council depending on your local hiring practices and protocol.

Finally, we believe that the process should be conducted in a planned, deliberate, and timely fashion. Specific preferences of the City should be accommodated in the design of the process, not as the process unfolds.

4. Our Proposed Process for Fort Atkinson

The following is our 12-step process that describes the scope of activities to be performed by Public Administration Associates, LLC during a typical municipal executive recruitment and selection process. We can readily adapt the process that we utilize to a schedule as may be requested by the City.

PAA Associate Bruce Stelzner and PAA President Kevin Brunner will lead this executive search process for the Fort Atkinson Public Works Director position. Brunner will be PAA's chief point of contact with Stelzner lending his assistance when needed and appropriate given his experience working with Brunner on previous Public Works Director searches.

Activities to be Performed by PAA Consultants for Fort Atkinson

1. Meet with the City Manager and Other Relevant City Officials as Appropriate (these initial meetings/discussions will be conducted virtually to reduce overall project costs to the City and will include those elected and appointed City officials that are determined to be part of the search process) to discuss the characteristics desired in the next Fort Atkinson Public Works Director as well as the process of recruitment; review the current Fort Atkinson Public Works Director job description and prepare needed revisions; prepare and present a salary market analysis for the position; prepare the position announcements; develop the requested comprehensive recruiting plan; determine recruitment procedures and the interview and selection processes, and determine the respective time schedules;

These meetings are important to establish the qualifications and qualities that the City of Fort Atkinson wants in the next Public Works Director and to determine the respective recruitment procedures and schedules.

2. Place advertisements in appropriate publications and on-line sources, including the American Public Works Association (APWA); Wisconsin Chapter-American Public Works Association (WAPWA); International City/County Management Association (ICMA), Illinois City/County Management Association (ILCMA), League of Wisconsin Municipalities, Wisconsin City/County Management Association (WCMA), Emerging Local Governmental Leaders Group (ELGL), League of Minnesota Cities, Strategic Government Resources (SGR), universities with State and nationally recognized civil engineering programs including the University of Wisconsin-Madison; University of Wisconsin-Milwaukee; University of Wisconsin-Platteville, Milwaukee School of Engineering (MSOE); Marquette University; Northern Illinois University and the University of Wisconsin-Stout; also contact and encourage personally known qualified individuals to apply;

APWA, WAPWA, the Minnesota League of Cities, Strategic Government Resources and the League of Wisconsin Municipalities are the premier channels for reaching qualified applicants for the Fort Atkinson Public Works Director position in our opinion.

3. Produce a one to two-minute video with the City to promote the position via social media (primarily YouTube and LinkedIn) to prospective applicants. Since we started the video posting of our client's position announcements several years ago, we have experienced a 35% increase in the number of applicants. PAA will assist in writing the script for the video and the City of Fort Atkinson will assist in providing readily available still photography and/or video content of City activities, events and facilities. City Manager Houseman will be videotaped as part of this video to promote the position. Here are two links to recent video job announcements (for the Ripon and Jefferson Public Works Director executive searches) we distribute via social media as examples.



**City of Ripon, WI
Director of Public Works**

youtu.be/Co5T_wBBBQ?si=2yPbX6T96XlTnPgt



**City of Jefferson, WI
Director of Public Works**

youtube.com/watch?v=W2l8EqkMePQ&t=20s

PAA will also produce a digital Fort Atkinson Public Works Director Position Profiles that will be used in the direct marketing of the position to targeted candidates identified by PAA and the

City. Several examples of these PAA Position Profiles are included as attachments to this proposal.

4. Receive applications and acknowledge receipt. We will download all application materials onto a Google Drive file and will share that with the City Manager and/or City Clerk so that a full and complete record of all submitted information is fully maintained for municipal recordkeeping and open records purposes.

5. Review applications and provide a “Mini-Resume” Candidates Report to the City Manager that will include a rating of the candidates as “fully qualified”, “partially qualified” or “unqualified” for the Public Works Director position;

6. PAA will recommend a short list of 4-6 qualified and skilled semi-finalists for the position to the City Manager with a written profile report on each noting the candidates’ strengths and weaknesses.

This will be the most important and time-consuming part of the recruitment process. Semi-finalists must supply references that are from elected officials and staff superiors, peers, and subordinates with whom the applicant has worked. If references are not appropriate, semi-finalists must supply additional references. Questions are asked about accomplishments, strengths, skills, interpersonal relationships, and needed areas of improvement. This information is critical in evaluating the candidates and preparing the requested candidate profile reports.

7. Contact semi-finalists recommended by PAA and approved by the City Manager for further consideration;

Semi-finalists will have electronic video interviews conducted by PAA and the City Manager. If desired as an alternative, candidate could also produce videos answering questions selected by the City Manager from previously vetted questions used by PAA in previous Public Works Director searches.

8. Review semi-finalists with the City Manager for selection of candidates to be interviewed on site in Fort Atkinson.

The City Manager will review the candidate video interviews, PAA candidate reports and submitted application materials. At this stage, all the candidates should be technically qualified to be the next Fort Atkinson Public Works Director. The primary value of the semi-finalist interview is to determine the "fit" with the City Manager and other City Staff before committing the candidates to come for final interviews/assessment activities in Fort Atkinson.

9. Work with the City Manager to arrange for the interviews and the on-site candidate assessment center in Fort Atkinson.

10. Facilitate the final candidate interview /assessment center process, including arranging the schedule, coordinating plans with candidates, providing sample interview questions, conducting selected assessment center activities, observing the interviews, facilitating the selection of the first choice, and seeing that the interviews run smoothly.

While there are a variety of approaches to the interview process, PAA normally recommends a one day “assessment center” type process. All the finalists on individual schedules tour Fort Atkinson and meet with the City DPW leadership team and appropriate administrative staff. These meetings are important for both the candidates and City staff. Other activities for the City Manager to consider as part of the scope of this assessment center process are a community mock project presentation, an in-basket exercise, a leaderless group discussion, an emotional intelligence or leadership assessment and a psychological review.

Towards the end of the day, the City Manager and other appropriate City staff and elected officials interview each final candidate for approximately one hour. In addition, it is suggested that each finalist participate in a writing exercise to determine writing skills.

There are other approaches to the interview/assessment center process. PAA will work with the City to determine the process that is most suitable for the City.

11. Provide assistance in the negotiation of an employment agreement (if required or desired).

Normally, PAA receives instructions from the City Manager regarding the negotiation of an employment agreement or employment letter for review and approval by the City Council Board at its next meeting. If an employment agreement is not required or desired by the City for this position, we are prepared to work with the City Manager and/or the City Attorney on the offer of employment and act as the go-between the City and the selected candidate.

12. Prepare digital letters for the City Manager’s signature thanking all applicants and notifying them of the final result.

5. Project Costs

We strive to make our costs affordable to the municipal clients that we serve. We know that in Wisconsin, with local government levy limits and expenditure restraints, that municipalities must be ever cost-conscious.

Total Cost-Public Works Director Only-**\$13,400**

Included in the above are all marketing costs (estimated at \$2,400) and direct consultant fees and expenses. Not included in our in the quoted costs above are any aptitude/psychological tests, emotional intelligence or leadership assessments; post-offer background checks and/or interview visits to the candidate's community of residence if desired or requested. If requested by the City, PAA will facilitate this work and just pass-through these costs to the City (PAA does not apply any mark-up to them).

PAA will bill the City for one-third of the quoted lump sum amount at the execution of the contract for executive search services with the City; one-third at the midpoint in the search process (selection of semi-finalists-step 6) and will bill the remainder of any other costs incurred on behalf of the City after the new Public Works Director has been hired (employment contract or offer of employment approved by the City).

6. Fort Atkinson Recruitment/Selection Schedule

Typically, a municipal management search of this type will take approximately 12-14 weeks from start to when the new employee begins his or her new duties, however, PAA will work closely with the City of Fort Atkinson to maintain a schedule that will get the new public works director on board as soon as possible.

The following is an outline of PAA's typical recruitment/selection process; however, we would want to modify this schedule after our initial consultation with City officials to, again, get a person on board as soon as possible.

WEEKS	1-2	3-6	7-11	12-14
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Project Discovery and DPW Director Job Description Review/Qualifications Discernment Process				
Ad Placement, Video Production, Position Announcement				
Application Reception				
Application Review, Assessment, Presentation to City (Search Mid-Point)				
Contact Semi-finalists				
Review Semi-finalists				
Candidate Assessment Center in Fort Atkinson/Interviews with City Officials				
Negotiations with Selected Candidate				

**New Public Works Director on
Board in Fort Atkinson**

7. Our Commitment to Fort Atkinson

Public Administration Associates, LLC will commit whatever time and effort is necessary to fully and successfully complete all tasks described in this proposal.

Public Administration Associates, LLC provides the following guarantees:

- If the initial search is not successful, PAA will conduct one additional search process until the Fort Atkinson Public Works Director position is filled with the understanding that PAA will be reimbursed for any additional out-of-pocket marketing costs that it might incur for the second position posting.
- If the candidate selected either resigns or is terminated for cause within the first twelve months of employment, PAA will conduct a new search and waive its consultation fee. We have had to only honor this guarantee three times for the 400+ municipal executive searches that we have conducted over the past 25 years (that is a success rate of over 99%). As such, we are very confident in our recruitment/selection processes that we employ.

8. PAA References (Recent Wisconsin Public Works Director Searches)

- Mark Fitzgerald, Village of Menomonee Falls, 262-532-4200 (O), mfitzgerald@menomonee-falls.org
- Tim Freitag, Administrator, City of Jefferson, 920-674-7700 (O), TFreitag@jeffersonwis.com
- Randy Knaack, Mayor, City of Menomonie, 715-232-2369 ext. 100, rknaack@menomonie-wi.gov

- Steve Kreklow, Administrator, Village of Germantown, 262-250-4775, skreklow@germantownwi.gov
- Ben Krumenauer, Administrator, Village of Bellevue, 920-410-5563 (O), bkrumenauer@villageofbellevuewi.gov
- Adam Sonntag, Administrator, City of Ripon, 920-748-4916 (C), asonntag@cityofripon.com
- Eddie Sheppard, Administrator, City of Shawano, 785-760-5455 (C), esheppard@cityofshawano.com

Quotes from three recent municipal clients:

"PAA consultants exceeded our expectations in every area of recruiting and hiring our new city administrator. They were invested in creating an inclusive and successful process for our staff, community, and the candidates. Their high degree of professionalism, knowledge, and communication skills were demonstrated throughout the project. We could not be more pleased. There is no hesitation in recommending them to any community."

Mayor Anissa Welch, City of Milton

"Thanks to Public Administration Associates, LLC, we were able to secure both an interim administrator who seamlessly guided us through a transitional phase and a permanent administrator who has already brought a fresh perspective and dynamic leadership to our organization. Their dedication to excellence and their unwavering support were integral to this successful outcome.

Without hesitation, I highly recommend Public Administration Associates, LLC to any organization seeking unparalleled professionalism, expertise, and results in their administrative recruitment endeavors. Their commitment to identifying the right talent is truly commendable, and their contributions have had a lasting positive impact on our organization."

Former Village President Chris Campbell, Village of Marshall

"PAA has conducted four city manager searches for Platteville during my 20+ year tenure on the City Council. They have also done consulting work for our community. I have found them to be highly capable professionals who are very networked in the city management profession and they have facilitated a highly inclusive selection process that has engaged not only our city council but the city staff and entire community. I recommend them strongly to any community who is seeking new administrative leadership."

City Council President Barbara Daus, City of Platteville

City of Fort Atkinson
Proposal to Provide Recruitment Services For the
Position of Public Works Director

I hereby certify that I am authorized to make this offer on behalf of the named company and to bind said company to this proposal. By submitting this proposal, I hereby represent that the firm identified below is fully qualified to perform the services described to achieve the organization's objectives in a professional manner.

Name of Firm Public Administration Associates

Address 1155 W. South Street

City/State/Zip Whitewater, WI 53190

Signature 

Name (Print) Kevin M. Brunner

Title President

Telephone Number 2 6 2 - 9 0 3 - 9 5 0 9

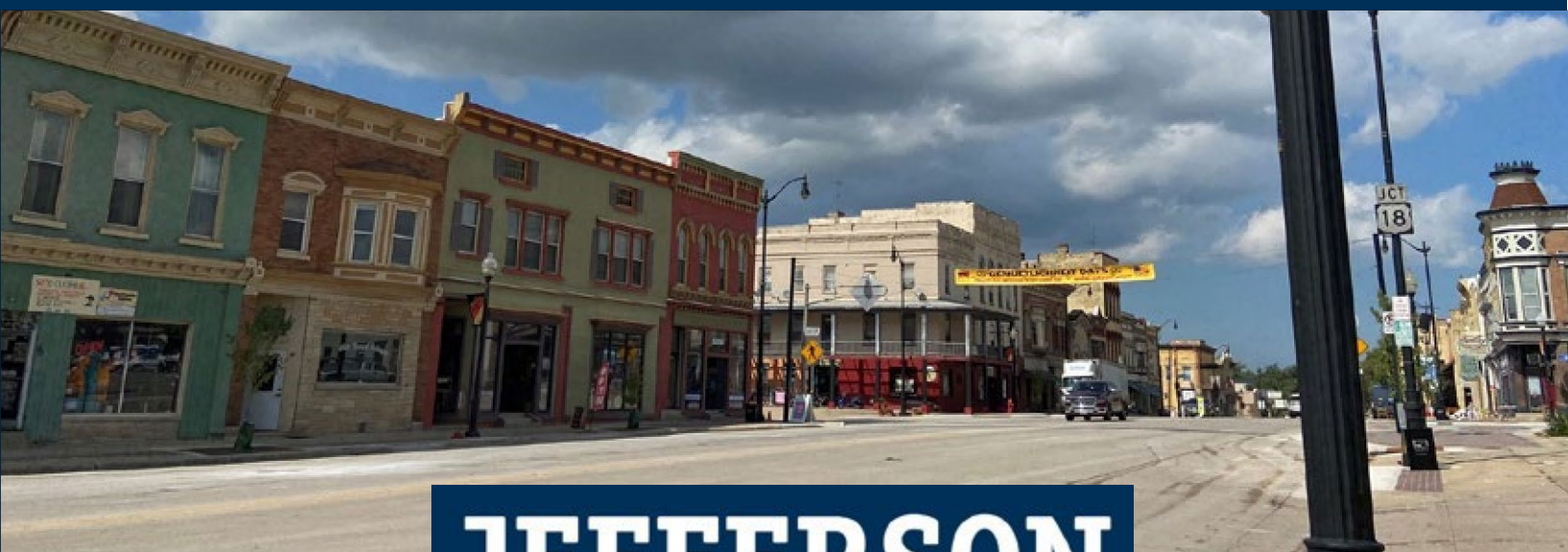
E -Mail Address kevin.brunner1013@gmail.com

Date Submitted December 10, 2024

PRICE PROPOSAL

Total Cost of Activities - All costs related to travel, supplies, etc., are to be included.

Total, not-to-exceed cost: \$13,400



JEFFERSON



Director of Public Works Position Profile



Public Administration Associates



www.jeffersonwis.com

The Community

Jefferson Township was first established in 1836 along the banks of the Rock and Crawfish Rivers. What is now the City of Jefferson operated under Town government until 1857, when the City of Jefferson was incorporated.

Jefferson's location was selected to make use of the area's waterpower and transportation opportunities provided by the Rock River. The City of Jefferson is the seat of Jefferson County. According to the U.S. Census 2020, the City of Jefferson is home to 7,793 residents which is a slight decrease from the 2010 U.S. Census figure of 7,973.

Jefferson is located only 9 miles south of Interstate 94 and has regional access to major economic and cultural centers such as Madison (25) miles, Milwaukee (35) miles and Chicago (130) miles.

Jefferson is a quaint Wisconsin community. Main Street shows off its vintage buildings and steepled churches built by German craftsmen. Two picturesque rivers flow through the middle of the city. The rivers are a focal point for both visitors and residents where they can float up, catch a concert, meal and even camp along the riverbank. The motto for the City of Jefferson is "We're going outside".

The School District of Jefferson encompasses an area of 94 square miles and operates five schools, including 3 elementary schools (PreK-5), one middle school (6-8) and one high school (9-12). The school district serves an enrollment of about 1900 students.

The Position

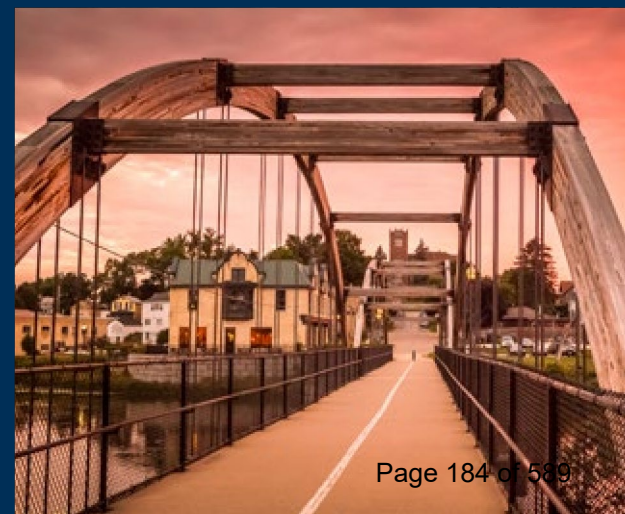
The Jefferson Director of Public Works leads the Public Works Department of the City and is responsible for the planning, directing, managing, and overseeing the activities and operations of the Department. The city government is comprised of a Mayor and Eight Alderpersons elected on a non-partisan basis. The Public Works Director/City Engineer reports to the City Administrator. The City provides a full range of public works municipal services including Yard Waste & Sanitation, Street Maintenance, Fleet, Engineering (contracted) and stormwater utility. There are 12 Full-Time and Part-time Employees currently working for the Public Works Department.

The Director of Public Works supports the work of the Common Council and City Administrator by coordinating official business and providing leadership and direction to the Department. The Director of Public Works is actively contributing to the overall management of the city as a member of the City's Senior Administrative Team. The Director advises and supports the City Administrator in consideration of general City policies, programs, and concerns and performs related work as required including the oversight of public works employees.

The Director of Public Works will administer an annual operating budget for FY 2023 that is \$2.2 M and an annual Capital Improvement Projects (CIP) budget of \$ 2.5 M.

To be successful as the Director of Public Works this individual must be able to:

- 1) Clearly and articulately provide information to the City Administrator and Common Council, other City Staff, and community stakeholders.
- 2) Possess an open and approachable demeanor in community engagement.
- 3) Serve as a role model for the Department in displaying dedication, energy, vitality, and the ability to accept new and exciting challenges, while at the same time being able to learn from and bounce back from setbacks,
- 4) Have the experience, capabilities, and confidence to assume full management responsibility for all public works services, activities and operations including administration, engineering, construction and maintenance of streets, yard waste, storm water, sanitation, fleet/facility and to be able to recommend and administer policies and procedures.



The Ideal Candidate

The City of Jefferson is seeking candidates who have demonstrated leadership in their past positions and exemplify creativity and innovation. The city desires a department leader who has the experience of leading a multi divisional department through a period of growth and challenges while possessing the strong ability to cultivate positive and productive relationships. The successful candidate will demonstrate a high level of both personal and professional integrity; open and positive communication skills with a willingness to be active and engaged in the Jefferson community, while leading by example.

The next Jefferson Director of Public Works must have excellent communications skills and be able to establish a good rapport with a wide variety of community members. Carrying oneself with a high degree of professionalism with personal integrity is a given. The city desires a candidate who fosters teamwork and who will support and encourage a positive working environment and professional development opportunities for public works staff.

The next Director must be able to work with other area stakeholders such as Wisconsin Department of Transportation, Wisconsin Department of Natural Resources, Jefferson County and others seeking additional funding for public works projects.

The Position requires advanced professional knowledge in modern theories, principles and practices of public works administration, engineering, capital project construction management, field maintenance operations, program development and administration. Requires advanced knowledge of applicable laws, codes, ordinances, and regulations governing modern and accepted public works construction, maintenance, and engineering practices. Requires advanced knowledge in the principles and practices of budget preparation and administration and the financial management of projects. Requires advanced knowledge of research and analytical methods. Requires sufficient math skills necessary to perform statistical analysis and interpret complex construction plans and maps. Requires sufficient knowledge of personal computer operations needed to properly operate common office software and used to construct relational databases that support department operations. The Position requires effective written and oral communication skills necessary to interact with a wide variety of individuals including members of the public, vendors, contractors, City staff, and elected officials.

The individual must possess or be able to obtain a valid Wisconsin license as a professional engineer within six months of employment. The individual must possess a valid Wisconsin driver's license. Possession of a commercial driver license, or the ability to obtain within one



JEFFERSON
WISCONSIN

We're going outside.



year of employment, is preferable and desirable. Residency in the nearby area is needed for emergency response.

Future Challenges and Opportunities

Jefferson's key assets include existing economic assets, natural/geographic assets, and community connections. The City's economic development vision guides redevelopment that builds off these assets. The City DPW Director Position helps implement this vision by identifying catalytic elements/projects which can act as stimulants to initiate expanded private development interest in the City of Jefferson while also considering public access to the two rivers which flow through the community, infrastructure improvements and changes, high-quality job creation, and sustainability.

Jefferson has the potential to expand its economic footprint and ability to accommodate 21st Century employers by addressing aging industrial and commercial stock and presenting companies with the potential locational and cost-saving advantages found in Jefferson. This is essential to recruiting and retaining businesses in a variety of sectors including heavy and light manufacturing, warehousing and storage, and assembly manufacturing.

Key highway interchanges and corridors bring travelers to Jefferson every day. These areas present opportunities for commercial and retail development, enticing travelers to stop and visit businesses – enhancing the quality of life for Jefferson residents, and providing new economic opportunities in the community. The City DPW Director Position assists in the identification and improvement of these key corridors to promote economic growth and stimulation.

The city has several sites that are currently underutilized and poised for infill development that will return them to productive uses while limiting the City's need to expand boundaries through annexation. This Position assists with the development of strategies that further efforts to repurpose these sites for new productive uses.

Salary Range

Starting salary range: \$92K-\$121K DOQ, plus excellent benefits.

How to Apply

Send cover letter, resume, salary history and five work-related references (one PFD) to Public Administration Associates, LLC, Attn: Bruce G. Stelzner, Associate, 18968 75th Avenue, Chippewa Falls, WI 54729; e-mail: bruce.stelzner@yahoo.com; phone 715-577-1330 by February 3, 2022.



Watch the Jefferson Director of Public Works Video Announcement.

<https://youtu.be/W2l8EqkMePQ>

Like many Wisconsin communities the City is experiencing a significant shortage of housing that appeals to varied demographics, including rehab of existing housing stock as well as new build. The City DPW Director assists community leaders with efforts to develop new markets for families, young adults, and empty nesters.

MUNICIPAL EXECUTIVE SEARCH SERVICES AGREEMENT

This Services Agreement is entered into as of this ____ day of December, 2024 by and between PUBLIC ADMINISTRATION ASSOCIATES, LLC, "PAA", and CITY OF FORT ATKINSON, "City".

Whereas, City needs assistance with professional recruitment and selection of City employees (Director of Public Works); and

Whereas, PAA has expertise in professional recruitment and selection of municipal administrators;

Therefore, the parties agree as follows:

1. **Services.** At City's request, PAA will provide those services listed under the process outlined in PAA's Proposal to the City dated December 10, 2024 and included as Exhibit A to this Agreement.

2. **Term.** PAA anticipates that this recruitment/selection process will take approximately ninety (90) days. The City shall have the right to terminate this Agreement in the event a suitable candidate has not been hired by the City within 90 days after execution of this Agreement. In the event of such termination, PAA shall be entitled to compensation for services performed in an amount equal to $\frac{1}{2}$ of the remaining balance then due under this Agreement.

3. **Payment.** For these services, City will pay PAA \$13,400 as follows:

A. One-Third (\$4,666) at the execution of this agreement;

B. One-Third (\$4,666) at the mid-point in the Director of Public Works search process (selection of semi-final candidates);

C. One-Third (\$4,666) upon the completion of services or acceptance by the City Manager and/or City Council of an employment agreement with the selected Director of Public Works.

4. **Other Direct Expenses.** In addition to the payment for the services, City will pay PAA for any special services that may be required by the City as enumerated in Exhibit A. PAA will submit

invoices for these direct expenses incurred with the final search completion billing.

5. **Professional Conduct.** PAA will provide the services to City in a professional and business-like manner, and will act in accordance with all Federal, State, and local laws, regulations, rules and ordinances. PAA will at all times endeavor to uphold and preserve the reputation of the City.

6. **Cooperation & Conduct.** Similarly, City and its representatives will act and communicate at all times in a professional manner, will provide its full cooperation to PAA in PAA's search on behalf of City, and will comply with all Federal, State, and local laws, regulations, rules and ordinances, including anti-discrimination laws, regulations, rules and ordinances.

7. **Liability Insurance.** PAA carries, and will continue to carry throughout the term of this Agreement, professional liability insurance with limits of \$1,000,000 per occurrence/\$1,000,000 aggregate.

8. **Hold Harmless & Indemnity.** City agrees to hold harmless, indemnify, and defend PAA from any and all demands, claims, causes of action, and judgments brought by candidates or third parties against PAA and/or City for City's negligent or intentional conduct resulting in damages to a candidate or third party provided, however, that the City shall not be liable for such actions to the extent they are undertaken in reliance on advice, recommendation or information provided by PAA.

Similarly, PAA agrees to hold harmless, indemnify, and defend City from any and all demands, claims, causes of action, and judgments brought by candidates or third parties against PAA and/or City for PAA's negligent or intentional conduct resulting in damages to a candidate or third party.

9. **Authorized Signatory.** The person signing this contract on behalf of City warrants and represents that she/he/they have the authority to do so.

10. **No Assignment.** Neither party may assign this contract without the written consent of the other party.

11. **Entire Agreement.** This contract contains the entire

agreement between the parties, and supersedes all prior discussions and negotiations between them. This contract may only be amended by a written contract signed by both parties.

12. **Disclosure of Attorney.** PAA discloses to City that one of PAA's partners is an attorney; however, PAA will not provide the City with legal advice. City must seek legal advice from its own counsel.

13. **Governing Law.** This agreement is governed by the laws of the State of Wisconsin.

14. **Records Retention.** PAA acknowledges that City is a governmental entity and is subject to the provisions of the Wisconsin Public Records Law (Wis. Stats. §19.31 et seq.). Most "records" as defined by the law generated in connection with this Agreement are subject to disclosure to the public upon request. City's obligation includes records prepared and maintained by contractors. Therefore, it may be necessary for City to obtain records from PAA while this Agreement is in effect, or during the required record retention period thereafter. The following provisions shall govern the retention and provision of documents relating to work under this Agreement:

a. Provision of Records by PAA. Upon request by the City, PAA shall provide to the City any and all documents in PAA's possession or control pertaining to the work performed pursuant to this Agreement which the City's record custodian determines are subject to release under the Public Records Law and have been requested by a requester. Such records shall be provided as soon as practicable and without delay, but in no event later than ten (10) business days after the request.

b. Preservation of Records. PAA shall retain copies of all documents and other records prepared by it in connection with the work under this Agreement for a period of not less than seven (7) years. The retention obligation under this paragraph shall not apply to any record after a copy of that record has been provided to City.

c. Indemnification. PAA agrees to indemnify the City and pay any and all costs, expenses, fees (including reasonable attorney fees), forfeitures, penalties and damages incurred by, or assessed against, the City which arise or result from a failure by PAA to timely provide any records to the City as

required by par. (a), above, other than documents no longer in possession of PAA and exempted from the retention requirement under par. (b). City agrees to indemnify and defend PAA and pay any and all costs, expenses, fees (including reasonable attorney fees), forfeitures, penalties and damages incurred by, or assessed against PAA which arise or result from the City's release of records provided by PAA under paragraph a, including, but not limited to the City's failure to: provide a record subject with notice when required, redact information protected by law, keep confidential the identities of employment applicants (with the exception of final applicants) or any cause of action by the subject of a record based on the release of the same by the City.

d. Survival. The obligations under this paragraph to produce and retain records, including the provisions for indemnity, shall survive the expiration or termination of this Agreement.

Dated this ____ day of December, 2024.

PUBLIC ADMINISTRATION ASSOCIATES

By *Kevin M. Brunner*

KEVIN M. BRUNNER, President
Public Administration Assoc.
1155 W South Street
Whitewater, WI 53190
kevin.brunner1013@gmail.com

CITY OF FORT ATKINSON

By _____



Proposal

DECEMBER 11, 2024

RFP

Executive Search Firm for the Recruitment and Selection of a Public Works Director

City of Fort Atkinson, Wisconsin

Submitted by:

MICHELE MORAWSKI
CLIENT SERVICES MANAGER
790 FRONTAGE ROAD
SUITE 213
NORTHFIELD, IL 60093
224.415.3791
MMORAWSKI@MGT.US

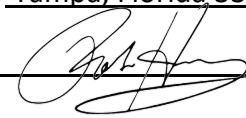
City of Fort Atkinson
Proposal to Provide Recruitment Services For the
position of Public Works Director

I hereby certify that I am authorized to make this offer on behalf of the named company and to bind said company to this proposal. By submitting this proposal, I hereby represent that the firm identified below is fully qualified to perform the services described to achieve the organization's objectives in a professional manner.

Name of Firm MGT Impact Solutions, LLC

Address 4320 West Kennedy Boulevard, Ste 200

City/State/Zip Tampa, Florida 33609

Signature 

Name (Print) Robert Holloway

Title Senior Vice President

Telephone Number 888.302.0899

E-Mail Address proposals@mgt.us

Date Submitted 12/10/24

PRICE PROPOSAL

Total Cost of Activities - All costs related to travel, supplies, etc., are to be included.

Total, not-to-exceed cost: \$ 25,000

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Introduction

December 11, 2024
Rebecca Houseman, City Manager
City of Fort Atkinson
101 N. Main St.
Fort Atkinson, WI 53538



RE: PROPOSAL FOR EXECUTIVE SEARCH FIRM FOR THE RECRUITMENT AND SELECTION OF A PUBLIC WORKS DIRECTOR

Dear Ms. Houseman:

Thank you for the opportunity to provide you with a proposal for the Public Works Director recruitment and selection process for the City of Fort Atkinson ("City"). Our proposal provides the City with firm qualifications, key experience, a detailed work plan and timeline, and associated fees to provide services that exceed expectations. We provide a tailored, personal approach to executive recruitment and selection and can adapt to your specific requirements for the position. This recruitment effort is vital to ensure effective management, strategic planning, and alignment with the city's Comprehensive Plan, Budget, and Capital Improvements Plan. MGT understands the importance of identifying a candidate who meets the technical qualifications and embodies leadership qualities that reflect the City's values and vision.

MGT Impact Solutions LLC (MGT) is a nationally respected leader in public sector management consulting and technology services with a long track record in support of state, local, and education clients. MGT takes the next step in offering integrated solutions that can accelerate our most important goal: dramatically improving lives by *advancing and lifting up the communities we serve*.

Our consultants have worked in all areas of local government leadership, including city/county management, human resources, public safety, finance, public works, parks and recreation, and utilities. This combined hands-on knowledge and experience has made MGT a proven leader in public-sector consulting.

MGT CONTACT INFORMATION

MGT HEADQUARTERS	MGT Impact Solutions, LLC 4320 West Kennedy Boulevard Tampa, Florida 33609 P: 813.327.4717 www.mgt.us FEIN: 81-0890071
PROPOSAL CONTACT	Michele Morawski, Client Services Manager 790 Frontage Road, Suite 213 Northfield, IL 60093 224.415.3791 mmorawski@mgt.us

Thank you for the opportunity to submit a proposal to the City of Fort Atkinson. Should you have questions on any aspect of this proposal, please contact **Michele Morawski** at **224.415.3791** or **mmorawski@mgt.us**.

Regards,

Patrick J. Dyer, Vice President. *Authorized to bind the firm.*





Experience and Qualifications

Impacting communities for good.

MGT brings **50 years** of experience driving positive social change and performance in education, government, nonprofits, and critical infrastructure/private industries through ***assisting clients to strengthen their foundation, change systematically, and enable resiliencies for long-lasting change.*** Since its inception, MGT has significantly grown in size and capacity – working with state and local governments and education partners. Today, we bring a team of over **900 professionals** who offer in-depth market knowledge and understanding so we can hit the ground running.

MGT is a privately held, employee-owned, and financially stable limited liability company with a deep roster of staff and a commitment to serving the public. Our clients care about addressing the world's most pressing problems, and so do we. Their “why” is our why.

What sets us apart is our ability to customize and offer individualized support but also the resources of a larger infrastructure to enable flexibility in impacting to-scale. Throughout our history, MGT has successfully delivered more than **30,000 projects** through a thoughtful balance of balancing the “immediate” needs while changing systems to plan for future resilience and success.

Our Commitment

MGT embraces the most complex challenges on the leadership agenda with deep commitment, agility, and local expertise to make a measurable and profound impact. Simply stated, **We are impacting communities for good.**

MGT | FIRST LOOK

Name: MGT Impact Solutions, LLC (MGT)

Locations: Headquarters in Tampa, FL; branch offices nationwide.

Cooperative Contracts:

ASC 20-7359, 24-7484

OMNIA LS4612

TIPS 220601, 220802, 230105

TXShare 2024-019

Structure: Privately held, employee-owned, client-driven Limited Liability Company.

Lines of Business: Strategy and Implementation, Performance and Operations, IT Infrastructure, and Cyber Security and Resilience for public sector and commercial companies.



50
years

900
consultants

30,000
projects

A Social Impact Commitment

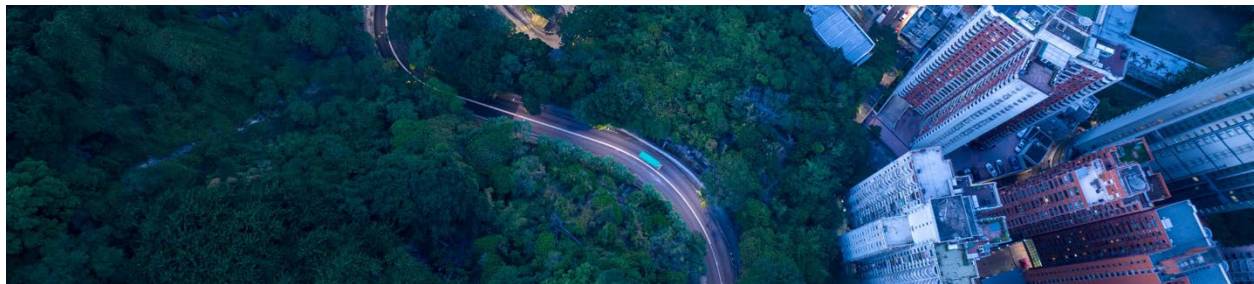
DEFINED BY **IMPACT**

MGT is committed to advancing community resilience and equity through every engagement. By supporting the City of Fort Atkinson in recruiting a Public Works Director, we aim to empower a leader who will enhance the quality of life for all residents. Infrastructure impacts every member of the community, from clean water access to reliable transportation and environmental stewardship. A strong Public Works Department enables equitable service delivery, sustainable growth, and innovation in public systems.

We view this recruitment as an opportunity to not only address immediate operational needs but also to set the stage for transformational change that benefits Fort Atkinson's residents today and for generations to come.

MGT's Expertise

Our firm includes more than **900 professionals**, structured into the following primary groups, along with various internal infrastructure groups to support our operations and growth.



Strategy & Implementation

Working alongside an organization's C-suite, we help leaders co-create strategy through organizational reviews and data analytics to create actionable roadmaps for success.



IT Infrastructure & Digital

We provide engineering expertise to modernize IT infrastructure and ensure your technology implementation is properly designed, integrated, modernized, and maintained.



Cyber Security & Resilience

From real-time, 24/7 monitoring to proactive threat detection and rapid incident response, we can give you the tools to heighten your network's security posture and keep it there.



Performance & Operations

Bridging the gap between strategy and enduring change, we support efficient revenue allocation, promote economic development, and create fairness in hiring and contracting systems.



Our MGT Vision

To achieve our mission of being the social impact and performance leader in our industry, we are continuously improving to earn the privilege of being selected as our client's partner of choice in the mission-critical domains we impact. By elevating education systems, managing and securing critical networks, solving complex human capital and fiscal problems, and advancing equity as a performance imperative, we can impact communities for good through client partnership.

We deliver these solutions through our "three-point stance" of technology, education, and performance offerings. With our long-term vision of creating profound social impact through client performance, we seek out the "best of the best" to join us in our work supporting clients' top priorities.

Markets we serve:

- Higher Education
- Prek-12
- Government
- Nonprofits
- Commercial Industries

PEOPLE	PURPOSE	PERFORMANCE
 We believe in the power of connecting people and ideas which solve mission-critical, complex challenges to foster a trusted connection with our clients...for life.	 We are led by a transformative movement, fueled by people, innovation, and solutions designed to provide enduring opportunities for prosperity and well-being.	 We partner with clients to advance learning outcomes, reduce operational costs, recover revenue, improve workflows, and provide resilient and hardened technology networks and infrastructure.

MGT's Differentiator: Full Suite of Services

Cyber & Network Solutions

Our Cyber Security and Network Security Solutions team offers a deep technical engineering bench of seasoned, certified experts working in the “security trenches” in complex IT environments. For the Managed Detection and Response (MDR) solution, our Security Operations Center (SOC) doesn’t sleep so our clients can. Our flagship, best-in-class managed firewall services are unparalleled. We detect, respond, and recover from cyber incidents proactively and harden our clients’ security posture.

 **100 in-house certified engineers**
24x7 NOC and SOC

Human Capital Solutions

Our experts are former local government and school leaders who understand the challenges facing today’s public sector organizations. We offer consulting, recruiting, and staffing solutions that include a full suite of human resources and management studies, executive recruitment services, and interim, managed, and outsourced staffing options. Our experts can assess your organizational culture and permanent and temporary staffing needs and evaluate your systems and structures, all to maximize efficiency and effectiveness.

 **1,725+ interim employees placed**
1,500+ executive recruitments
500+ consulting studies
In 48 states!

Education Solutions

We create recommendations for our educational clients that are reliable, actionable, and based on proven research and a thorough understanding of each district or system’s program needs and long-term goals. Our team is led by former state education commissioners, district superintendents, school board members, principals, and teachers. Our partnerships have allowed clients to reinvest hundreds of millions of dollars back into the classroom.

 **50 million students served**
38 state DOEs as clients

Financial Solutions

Public agencies face increasing pressure to improve effectiveness and efficiency while operating in a transparent and sustainable manner. We partner with government organizations, school districts, higher education institutions, and not-for-profits to help them achieve long-term success.

 **50+ years of trusted relationships**
Proprietary software

Diversity, Equity, & Inclusion (DEI) Solutions

We help public sector clients address issues and challenges related to policies and practices that adversely impact DEI. We are one of the largest providers of disparity studies and other DEI solutions designed to increase equitable and inclusive organizational outcomes.

 **225 disparity studies**
DEI assessments & training
Equity Audits

Public Affairs Solutions

Our team of former nationwide leaders in policy development and education leadership partner with our clients to provide business advisory and public opinion architecture solutions that lift up and evolve education ecosystems and impact public policy programs.

 **Global clientele**
Staff are former policymakers

Our Team

The success of a consulting engagement is founded on the qualifications of the project team and the way in which it is structured and managed.

MGT employs professionals with backgrounds in local government and the not-for-profit sector. With the City's staffing needs in mind and due to the significance of this recruitment, we have assigned our highly knowledgeable and experienced consultants, Dave DeAngelis, Lee Szymborski, or Ashley Eccles, depending on availability when a contract is awarded. They will act as your project manager and primary point of contact for this project. All project managers are supported by our Recruitment Team Leader, a recruitment coordinator, and a reference specialist. Depending on availability when a contract is awarded, MGT reserves the right to assign another project manager to ensure the recruitment is completed within an appropriate time frame.

Consultants

	DAVE DE ANGELIS Senior Consultant 847-380-3240 DDeAngelis@mgt.us	Mr. De Angelis has over 30 years of experience in local government administration and leadership. He works on executive search, general management consulting assignments, and interim administrator roles. He has proven himself to be a regional leader in intergovernmental cooperation, working across all lines of government.
	ASHLEY ECCLES Senior Consultant 847-380-3240 AEccles@mgt.us	Ashley possesses nine years of professional experience in the public sector. She has a proven track record of strategic leadership and extensive experience in navigating complex municipal landscapes as a former Assistant Village Administrator. She has led cross-functional teams and possesses a multi-faceted background specializing in Human Resources, Communications, Information Technology, and Risk Management functions.
	LEE SZYMBORSKI Senior Consultant 414-750-7799 LSzymborski@mgt.us	Mr. Szymborski brings over 30 years of local government expertise to MGT. With a recruitment background from roles in Buffalo Grove and Mequon, he joined MGT in 2014 and has since led 130+ executive searches across the Midwest, East Coast, and South. He also works with non-profits, notably the International City/County Management Association.

Proposal Inquiries



CHARLENE STEVENS

Vice President – Human
Capital Solutions
847.380.3240 x124
CStevens@mgt.us



MICHELE MORAWSKI

Client Services Manager
224.415.3791
MMorawski@mgt.us

References

A leader in local government recruitment and selection. More than one-third of the organizations served by MGT have contracted for multiple projects; we feel repeat business is the greatest testament to our commitment to customer service and client satisfaction. We encourage you to contact any of our references to learn of our professionalism, ability to meet timelines, and the expertise of our staff.

NORRIDGE, ILLINOIS (IN PROGRESS)

Joanna Skupien, Village Administrator
4000 N. Olcott Avenue | Norridge, IL 60706
jskupien@villageofnorridge.com

MGT currently provides Limited recruitment and selection services for the Director of Public Works.

GERMANTOWN, TENNESSEE

Courtney Taylor, Human Resources Director
1930 S. Germantown Road | Germantown, TN 38138
ctaylor@germantown-tn.gov

MGT provided recruitment and selection services for the Director of Public Works position in 2024.

WAUKESHA, WISCONSIN

Dr. Marquise D. Vasquez, Director of Human Resources
201 Delafield Street, 3rd Floor | Waukesha, WI 53188
mvasquez@waukesha-wi.gov

MGT provided recruitment and selection services for the following positions:

- Fire Chief, 2024
- City Administrator, 2023
- Director of Public Works, 2023
- Finance Director, 2022
- Cemetery Director - Limited, 2021
- Finance Director, 2020
- Chief of Police, 2020
- HR Director, 2019
- Director of Information Technology, 2017
- City Administrator, 2015

Similar Executive Searches

MGT has been providing Executive Search Services for 15 years. Our firm offers full-service executive recruitment and selection services customized to meet the City's individual needs. Through our firm's experience with hundreds of placements over the last decade, the MGT team provides a growing pool of highly qualified candidates who are well-suited to handle the challenges and expectations of professional positions in local government and the not-for-profit sector. MGT has extensive experience in public sector recruitment, having completed over **1,400 recruitments** in the past decade.

A list of the clients we have had the pleasure of partnering with that complements the City's recruitment request is provided on the following pages.

EXPERIENCE AND QUALIFICATIONS



Water/Utility & Public Works Client List 2021 to Present

State	Client	Position Title	Year	Population
Alaska	Soldotna	Utility Manager	2021	4,163
Arkansas	Bella Vista	Assistant Street Superintendent (Professional Outreach)	2022	29,475
Colorado	Fort Collins	Deputy Director - Light & Power Operations (Professional Outreach)	2022	165,080
	Fort Collins	Project Manager - Halligan Water Supply (Professional Outreach)	2022	165,080
	Fort Collins	Senior Specialist, Floodplain Management (Professional Outreach)	2023	165,080
	Longmont	Safety and Training Manager (Professional Outreach)	2023	100,758
Florida	Apopka	Public Services Deputy Director	2024	55,496
	Orlando	Public Works Director	2022	307,573
	Solid Waste Disposal and Recycling Authority of Broward County	Executive Director	2024	1,944,375
	Tampa Bay Water	Chief Science Officer	2021	Multi
	Tampa Bay Water	Project Management Manager (Professional Outreach)	2024	Multi
Illinois	Barrington	Director of Public Works	2022	10,455
	Cary	Director of Public Works and Engineering	2023	17,840
	Charleston	Assistant Public Works Director (Professional Outreach)	2023	20,141
	Clinton	Assistant Director of Public Works (Professional Outreach)	2023	6,982
	Crest Hill	Director of Public Works (Professional Outreach)	2024	21,169
	Danville Sanitary District	District Engineer	2024	Multi
	Fox River Water Reclamation District	Executive Director	2022	Multi
	Fox River Water Reclamation District	Technical Services Director (Limited)	2023	Multi
	Galesburg	Director of Public Works (Professional Outreach)	2023	33,706
	Glencoe	Public Works Director	2023	8,900
	Grayslake	Public Works Director/Village Engineer	2024	20,831
	La Grange	Director of Public Works	2021	15,610
	Lake County	Director of Public Works	2023	703,462
	Lincolnwood	Director of Public Works	2023	12,590
	Moline	Director of Public Works	2021	43,100
	Morton Grove	Director of Public Works	2023	23,500
	Niles	Director of Public Works	2024	30,001
	Norridge	Director of Public Works (Virtual)	2024	15,251
	Northwest Suburban Municipal Joint Action Water Agency	Executive Director	2022	Multi
	Northwest Water Commission	Executive Director (Virtual)	2022	Multi
	Olympia Fields	Director of Public Works (Professional Outreach)	2022	4,821
	Olympia Fields	Public Works Director (Professional Outreach)	2024	4,821
	Oregon	Public Works Director (Professional Outreach)	2022	3,660
	Plainfield	Director of Public Works	2022	41,734
	Solid Waste Agency of Northern Cook County	Executive Director	2021	Multi

EXPERIENCE AND QUALIFICATIONS

	Vernon Hills	Director of Public Works/Engineer	2022	25,911
	Wauconda	Public Works Director	2021	14,125
	West Chicago	Public Works Director	2021	27,221
	Westmont	Public Works Director	2022	24,767
	Winnetka	Director of Public Works (Limited)	2023	12,417
Iowa	Central Iowa Water Works	Executive Director	2024	Multi
	Dubuque	Industrial Pretreatment Coordinator (Professional Outreach)	2023	59,700
	Dubuque	Water and Resource Recovery Center Director (Professional Outreach)	2023	59,700
Maryland	Hagerstown	Water and Wastewater Engineer (Professional Outreach)	2023	40,612
Michigan	Battle Creek	Public Works Director	2022	52,721
	Ferndale	Director of Public Works	2021	20,428
	Oakland County	Director of Public Service	2021	1,251,000
	Rochester	Director of Public Works	2021	13,017
Minnesota	Blaine	Assistant Director of Public Works	2021	67,939
	Blaine	Deputy Director of Public Works	2023	67,939
	Blaine	Director of Public Works	2022	67,939
	Burnsville	Public Works Director	2023	60,000
	Vadnais Heights	Public Works Director/City Engineer (Professional Outreach)	2023	13,080
Missouri	Metropolitan St. Louis Sewer District	Executive Director/CEO	2023	Multi
	University City	Director of Public Works	2022	35,172
Nebraska	Nebraska City Utilities	Operations Superintendent	2023	7,200
North Carolina	Fayetteville	Assistant Public Services Director - Transportation (Professional Outreach)	2023	210,000
	Fayetteville	Capital Projects Program Manager (Limited)	2023	210,000
	Fayetteville	Fleet Manager	2022	210,000
	Fayetteville	Solid Waste Manager (Professional Outreach)	2023	210,000
	Fayetteville	Stormwater Manager (Limited)	2023	210,000
	Fayetteville	Street and RoW Infrastructure Maintenance Manager (Professional Outreach)	2023	210,000
	Fayetteville	Water Resources Engineer (Professional Outreach)	2023	210,000
	Holly Springs	Director of Public Works	2021	42,000
Tennessee	Germantown	Director of Public Works	2024	41,333
Virginia	Roanoke	Director of Public Works	2023	100,220
Wisconsin	Bellevue	Director of Public Works (Virtual)	2021	15,524
	Burlington	Director of Public Works	2024	10,511
	Cottage Grove	Deputy Director of Public Works & Utilities (Professional Outreach)	2022	9,740
	Cottage Grove	Public Works and Utilities Director (Virtual)	2023	9,740
	Geneva Lake Environmental Agency	Director	2021	Multi
	Lisbon	Public Works Director (Virtual)	2024	10,734
	Oak Creek	Neighborhood Preservation Officer (Virtual)	2021	35,243
	Port Washington	Water Utility Superintendent	2022	11,250
	Portage	Director of Public Works (Professional Outreach)	2021	10,500
	Portage	Utilities Manager (Professional Outreach)	2021	10,500
	Ripon	Assistant Director of Public Works (Professional Outreach)	2023	7,833
	Waukesha	Director of Public Works	2023	71,158

Why Choose MGT?

- ✓ ***Unparalleled Expertise and Level of Service.*** With executive recruitment experience in 44 states, and in communities ranging in population from 1,000 to 3,000,000, we are a leader in the field of local government recruitment and selection. More than 40% of our clients are repeat clients, and 94% of surveys show our overall performance rating as ***Outstanding*** – indicating a plan to use our services and/or highly recommend us in the future.
- ✓ ***Delivering the Best.*** We conduct comprehensive **due diligence** on candidates. Our state-of-the-art process includes extensive use of social media for candidate outreach and video interviews with potential finalist candidates, ensuring successful recruitment for the City. We will provide important information to potential candidates by developing a high quality, thorough Recruitment Brochure reflecting the knowledge we will have about your community and your organization. Before we recommend a candidate to you, **we ask probing questions** that will verify their expertise during video interviews, reference calls, and news and social media searches.
- ✓ ***A Partner from Start to Finish.*** We are your partners in this important process. We welcome you to review all the resumes we receive, and we will share our honest assessment of the candidates. Our goal is your **complete satisfaction**. We can strategize with you on a variety of approaches for meeting your recruiting needs, including evaluation of internal candidates, identification of non-traditional candidates who meet your recruitment requirements, succession planning, and mentoring options. We are committed to working with you to find the candidate that is the best fit for your position.
- ✓ ***Services for Any Budget and Any Search.*** We strive to meet the specific needs of our clients by offering several options for recruitment services to meet your budget. Our services range from Full Executive Recruitments to Virtual Recruitments and even simply Professional Outreach for those who want to reach a broader network. In the following proposal, we have provided the scope we believe **best fits your needs**.

Success Stories

"We were very impressed by how efficient they worked, their methodology, their insight, and their professionalism.

I would highly recommend MGT and hope to do business with them again for our next study."





Approach/Strategy Used to Perform the Project

A detailed plan specifically designed for you.

Project Understanding

The City of Fort Atkinson seeks a qualified and visionary Public Works Director to lead its multifaceted Public Works Department, ensuring the effective management of vital city operations. This role encompasses oversight of divisions including Engineering, Public Works Operations, Utilities (stormwater, wastewater, and water), Electrical, and Building Inspection/Zoning Administration. With a newly restructured leadership framework, the City aims to secure a dynamic leader who will enhance departmental performance, foster collaboration, and advance the city's Comprehensive Plan and Capital Improvements Plan.



Success Stories

"The coordination by the consultant helped to alleviate the workload of internal staff. Consultant was willing to customize the process based on the City's needs."

MGT proposes a tailored recruitment strategy to identify a candidate who embodies technical expertise and a commitment to public service. Through a comprehensive advertising, recruitment, and selection process, MGT will ensure the City of Fort Atkinson finds a qualified leader who aligns with the city's values and strategic objectives.

PROJECT GOALS:

- Develop and execute a strategic recruitment campaign targeting highly qualified professionals with experience in public works, engineering, and municipal operations.
- Identify a candidate with proven leadership skills to foster collaboration across divisions, address operational challenges, and engage with residents and City stakeholders.
- Ensure the new Director of Public Works aligns with the city's long-term goals as outlined in its Comprehensive Plan and Capital Improvements Plan.
- Promote equitable hiring practices to build a leadership team reflective of the community it serves.

Proposed Work Plan

A typical recruitment and selection process takes approximately 175 hours to conduct. At least 50 hours is administrative, including advertisement placement, reference interviews, and due diligence on candidates. We believe our experience and ability to administer your recruitment professionally will provide you with a diverse pool of highly qualified candidates for your position search.

APPROACH/STRATEGY USED TO PERFORM THE PROJECT

Our clients are informed of the progress of their recruitment throughout the entire process. We are always available by mobile phone or email should you have a question or need information about the recruitment.

PHASE 1

POSITION ASSESSMENT, POSITION ANNOUNCEMENT, & BROCHURE

Activities

MGT treats each executive recruitment as a transparent partnership with our client. We believe in engaging with stakeholders early in each recruitment process to fully understand the challenges and opportunities inherent in the position. Understanding the organizational culture is critical to successful recruitment. We gain this insight and information through meetings (one on one and in small groups), surveys, and a review of relevant information. This information is reflected in a polished marketing piece that showcases the organization and the area it serves.

INFORMATION GATHERING

- One-on-one or group interviews with stakeholders identified by the City.
- Community forums (in-person or via video) can be used to gather input and feedback.
- Surveys can be used for department personnel and/or the community to gather feedback.
- Conversations/interviews with department heads.

A combination of the items listed above can be used to fully understand community and organizational needs and expectations for the position (this proposal includes 12 hours of meetings – additional meetings can be added for a fee of \$195/hour plus actual expenses if incurred). One organizational survey is included. A Community Survey can be conducted for \$2,500. Community Forums are conducted as an optional service.

Development of a **POSITION ANNOUNCEMENT** to be placed on websites and social media.

Development of a thorough **RECRUITMENT BROCHURE** for the City's review and approval.

Agreement on a detailed **RECRUITMENT TIMETABLE** – a typical recruitment takes between 90 to 120 days from the time you sign the contract to the appointment of the finalist candidate.

PHASE 2

ADVERTISING, CANDIDATE RECRUITMENT, & OUTREACH

Activities

We make extensive use of social media as well as traditional outreach methods to ensure a diverse and highly qualified pool of candidates. Our website is well known in the local government industry – we typically have 17,000+ visits monthly to our website and career center. Additionally, our weekly jobs listings are sent to over 8,000 subscribers.

Phase 2 will include the following:

- MGT consultants will personally identify and contact potential candidates.

APPROACH/STRATEGY USED TO PERFORM THE PROJECT

- Develop a database of potential candidates from across the country unique to the position and to the City, focusing on:
 - Leadership and management skills.
 - Size of organization.
 - Experience in addressing challenges and opportunities also outlined in Phase 1.
 - The database will range from several hundred to thousands of names. An email campaign will be sent to each potential candidate.
- Placement of the Position Announcement:
 - Public sector online Career Centers.
 - **Social media:** LinkedIn (posted on MGT Executives LinkedIn news feeds to reach over 50,000 connections), Facebook, and Instagram.
 - MGT will provide the City with a list of advertising options for approval.

PHASE 3 CANDIDATE EVALUATION & SCREENING

Activities

Phase 3 will include the following steps:

- Review and evaluation of candidates' credentials with consideration to the criteria outlined in the Recruitment Brochure.
- Candidates will be narrowed down to those that meet the qualification criteria.
- Candidate evaluation process:
 - Completion of a questionnaire explaining prior work experience.
 - Live Video Interview (45 minutes to 1 hour) conducted by consultant with each finalist candidate.
 - References provided by the candidate are contacted.
 - Internet/Social Media search conducted on each finalist candidate.

All resumes will be acknowledged and inquiries from candidates will be personally handled by MGT, ensuring the City's process is professional and well regarded by all who participate.

PHASE 4 PRESENTATION OF RECOMMENDED CANDIDATES

Activities

Phase 4 will include the following steps:

- MGT will prepare a Recruitment Report presenting the credentials of those candidates most qualified for the position.
- MGT will provide an electronic recruitment portfolio which contains the candidates' materials along with a "mini" resume for each candidate so that credentials are presented in a uniform way.
- The City will receive a log of all applicants and may review resumes if requested.

APPROACH/STRATEGY USED TO PERFORM THE PROJECT

- Report will arrive in advance of the Recruitment Report Presentation.

MGT will meet with the City to review the recruitment report and provide additional information on the candidates.

PHASE 5 INTERVIEWING PROCESS & BACKGROUND SCREENING

Activities

Phase 5 will include MGT completing the following steps:

- Develop the first and second round interview questions for the City's review and comment.
- Coordinate candidate travel and accommodations.
- Provide the City with an electronic file that includes:
 - Candidates' credentials.
 - Set of questions with room for interviewers to make notes.
 - Evaluation sheets to assist interviewers in assessing the candidate's skills and abilities.

Background screening will be conducted along with additional references contacted:

MGT BACKGROUND SCREENING

✓ Social Security Trace & Verification	✓ County/Statewide Criminal
✓ US Federal Criminal Search	✓ Civil Search
✓ Enhanced Verified National Criminal	✓ Bankruptcy, Liens, and Judgements
– National Sex Offender Registry	✓ Motor Vehicle Record
– Most Wanted Lists: Federal Bureau of Investigation (FBI), Drug Enforcement Agency (DEA), Bureau of Alcohol, Tobacco, Firearms and Explosives (ATF), Interpol	✓ Education Verification – All Degrees Earned
– Office of Foreign Assets Control (OFAC) Terrorist Database Search	Optional: Credit Report – Transunion with score (based on position and state laws)
– Office of the Inspector General (OIG), General Services Administration (GSA), System for Award Management (SAM), Food and Drug Administration (FDA)	Optional:
– All felonies and misdemeanors reported to the National Database	– Professional License Verification
	– Drug Screen
	– Employment Verification

MGT will work with you to develop an interview schedule for the candidates and coordinate travel and accommodations. MGT consultants will be present for all the interviews, serving as a resource and facilitator.

APPROACH/STRATEGY USED TO PERFORM THE PROJECT

MGT will coordinate a 2-Step Interview process. The first-round interviews will include four to five candidates. The second-round interviews will include two or three candidates. MGT will supply interview questions and an evaluation form.

In addition to a structured interview, the schedule can incorporate:

- Tour of the City’s facilities.
- Interviews with senior staff.

PHASE 6
APPOINTMENT OF CANDIDATE

Activities

- MGT will assist you as much as requested with the salary and benefit negotiations and drafting of an employment agreement, if appropriate.
- MGT will notify all applicants of the final appointment, providing professional background information on the successful candidate.

Project Timeline

Based on our experience in conducting similar projects, we anticipate the proposed project can be completed within 14 weeks of project initiation as illustrated in **Exhibit 1**.

Exhibit 1. Proposed Schedule

WORK PLAN TASKS	WEEK													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Phase 1: Position Assessment, Position Announcement, & Brochure														
Phase 2: Advertising, Candidate Recruitment, & Outreach														
Phase 3: Candidate Evaluation & Screening														
Phase 4: Presentation of Recommended Candidates														
Phase 5: Interviewing Process & Background Screening														
Phase 6: Appointment of Candidate														

Commitment to Diversity, Equity, & Inclusion in Recruitments

MGT is a leader in diversity, equity, and inclusion (DEI) consulting services, strategic planning, and organization transformation. MGT’s experience working in diverse communities across the United States and working with organizations seeking to change organization culture is critical to the success of all our projects. We have a track record of building awareness, solutions, and

APPROACH/STRATEGY USED TO PERFORM THE PROJECT

direction for systemic change by generating transformative ideas and solutions, information, and practices into operational strategies, which help us stand out in all our projects.

MGT is also one of the original and premier disparity research firms in the country. Disparity studies were the first instance of bringing principles of diversity, equity, and inclusion into the public sector, through the procurement process, and since 1990, **MGT has conducted more than 230 public sector disparity studies**. These studies are designed to improve procurement departments, promote and advance equity, and improve economic outcomes for diverse communities that have been historically marginalized by analyzing policies, practices, and programs to increase the utilization of minority- and women-owned businesses. Clients that have conducted a disparity study are in the unique position to increase and improve systematic equity through procurement and contracting, which can ultimately promote economic empowerment by creating strong business and employment pipelines in communities of color.

MGT also has a long-standing commitment to DEI. Since the firm's inception they have supported, with their time and financial resources, organizations that advance underrepresented populations in local government. These include the National Forum for Black Public Administrators, the Local Government Hispanic Network, The League of Women in Government, and CivicPride. Our Team Members have moderated and spoken on DEI topics at the International City and County Management Association conference and state conferences. Our employees and consultants have undergone Implicit Bias Training, and we are frequent speakers on incorporating equity and inclusion into all levels of local government. Additionally, we provide a list of DEI resources on the homepage of the website at mgt.us.

MGT has formally partnered with the National Forum for Black Public Administrators' consulting arm, i4x, and in several recruitment and selection processes throughout the country including Toledo, OH; Fort Collins, CO; Ann Arbor, MI; Oakland, MI; and Arlington, TX. Our partnership reflects our mutual commitment to advancing DEI values and increasing the diversity of local government leaders at the highest levels of local government organizations.

MGT's Recommendations to RECRUIT and Retain Top Talent

RESPONSIVE: ROLL OUT THE WELCOME MAT! Candidates may struggle with relocating for a new position as well as being concerned about the "fit" with a new team. It is important to include costs for your top candidate(s) to travel to your location for the final interview process. Our team will work with you to create a welcoming, informative experience for both you and the candidate(s).

ENCOURAGING: Employee development is a must-have in today's market. Candidates appreciate their employer investing in them as much as they are investing themselves in the job. Consider "up and coming" candidates who may lack one or two preferred skills and assign a mentor or invest in a course to encourage their professional development. A mentor/training program will also help establish a peer-to-peer connection and make them feel more comfortable about the transition to a new job.

COMPETITIVE: Our team will guide you in offering a competitive market rate compensation and competitive benefits package attractive to today's candidates. Competitive employers must include relocation expenses and should consider signing bonuses and temporary housing.

RESOURCEFUL: Review your job description – do you need public sector experience? Are the years' experience you list essential, or can that be preferred? Consider a more resourceful

APPROACH/STRATEGY USED TO PERFORM THE PROJECT

approach when reviewing candidates' experience. Carefully assess requirements such as Certified Public Accountant (CPA), Professional Engineer, and others that will limit your talent pool – consider using the word “ideally” or “preferably.”

UNDERSTANDING: These past few years have, without a doubt, changed the work environment. Competitive employers have recognized this and are offering flexible/hybrid/remote work options. Those positions that offer this type of flexibility consistently receive a better candidate response rate.

INNOVATIVE: Think about what is unique and attractive about your community and organization and highlight that in your recruitment efforts. Talk about organizational culture and what your values are with respect to your employees. MGT will assist you in being as innovative as possible in your outreach.

TRANSPARENT: Some states now mandate listing salary ranges in any job advertisements or postings. More and more companies are showing at least a salary range in their postings to promote pay transparency and equity. Post the salary range you will use for hiring – it is public information. If we make it too difficult for candidates to find out the salary, they will move on to the next opportunity.



Cost Proposal

*Defined by Impact. Driven by People.
Dedicated to the Community.*

We take pride in customizing our client's needs — and we will work with you to ensure our fees are aligned with your expectations and budget.

Full Scope Recruitment

Summary of Costs	Price
Recruitment Fee	\$21,500
Recruitment Expenses (not to exceed) Expenses include candidate due diligence efforts	\$1,500
Advertising <i>*Advertising costs over \$2,000 will be placed only with client approval. If less than \$2,500, Client is only billed for actual cost.</i>	\$2,000*
TOTAL:	\$25,000**

***Consultant travel expenses are not included in the price proposal. If the consultant is requested to travel to the client, travel costs will be estimated at time of request. Only actual expenses will be billed to the City for reimbursement.*

Possible in-person meetings could include:

- Recruitment brochure interview process
- Presentation of recommended candidates
- Interview Process

Any additional consultant visits requested by the City (beyond the three visits listed above) will be billed at \$195/hour. The additional visits may also result in an increase in the travel expenses billed.

*This fee does not include travel and accommodation for candidates interviewed.

Payment for Fees & Services

1st Invoice: Contract Award (40% of the Recruitment Fee).

2nd Invoice: Presentation of Candidates (40% of the Recruitment Fee & expenses incurred to date).

Final Invoice: Completion of Recruitment (20% of the Recruitment Fee plus all remaining expenses).

Payment of invoices is due within 30 days of receipt.

Our Guarantee – Full Scope Recruitment

MGT is committed to assisting our clients in the selection and appointment of a suitable candidate. In today's competitive hiring market, it is critical to move expeditiously to interview candidates and make key hiring decisions; failure to do so may result in the loss of desirable candidates. If the client has not responded to multiple requests for decisions and/or guidance within six weeks of candidates being presented for interview or following finalist interviews, MGT may choose to cancel the contract and bill the client for work completed to date.

It is MGT's goal to provide the client with well-qualified candidates for their hiring needs. If the client rejects the list of qualified candidates and/or fails to negotiate in good faith and come to terms for hiring a candidate and instead chooses to readvertise the opportunity, MGT reserves the right to charge additional consulting fees commensurate with the additional work requested.

Upon appointment of a candidate, MGT provides the following guarantee: should the selected and appointed candidate, at the request of the City or the employee's own determination, leave the employ of the City within the first 12 months of appointment, we will, if desired, conduct one additional recruitment for the cost of expenses and announcements. Reimbursable expenses may be incurred should the recruitment process require the consultant to travel to the City. To engage in this guarantee, the request must be made within six months of the employee's departure.

Optional Assessment Center

Qualified Assessors to Identify Your Needs.

If requested, as part of the selection process MGT will perform an Assessment Center for candidates selected for interview. An Assessment Center is a useful tool for identifying and evaluating the strengths, areas for improvement, skills, and abilities of the candidates. MGT consultants will prepare all the related documents and scoring sheets for any three of the following exercises to be completed on the day of the Assessment Center:

- In-Basket Exercise
- Written/Oral Presentation Exercise
- Leaderless Group Exercise
- Structured Interview
- Budget Analysis Exercise
- Personnel Issues Exercise
- Other exercise of the City's choosing

Optional Assessment Center Fee: **\$8,500***

**The fee assumes the Assessment Center will be held on one day and be limited to no more than five candidates. For each additional candidate, the fee will increase by \$750.*

The fee includes the preparation of the Assessment Center material and a written report outlining the findings of the Assessment Center as reported by the Assessors. We will assist the City in selecting three professionals from outside the organization to serve as Assessors in evaluating each candidate's strengths and weaknesses. The City will be responsible for paying a \$750 stipend to each Assessor (and possible mileage or other transportation costs for the assessors).

The fee does not include lodging, travel, and meal expenses for the MGT facilitator(s) to be on-site for the Assessment Center. Actual expenses will be billed in addition to the fee. If the City chooses to add the Assessment Center option, the fees and expenses for this will be billed separately.



Optional Services

The Nation's Recruitment Leader.

Having a solid plan in place is the only way to reach your long-term vision and goals, and we want to see you thrive. Our variety of services can be personalized to make the most of your strengths and give you an extra layer of support where you need it. We offer the following additional service offerings:

GOVTEMPSUSA

Need an Interim? GovTempsUSA, a division of MGT, specializes in the temporary placement of positions in local government. The firm offers short-term assignments in addition to long-term and outsourced arrangements. Our placement professionals at GovTempsUSA have typically enjoyed distinguished careers in local government and displayed a commitment to public service throughout their careers.

RECORDED ONE-WAY VIDEO INTERVIEW OF CANDIDATES

Candidates we recommend for your consideration can complete a one-way video interview with three to five questions that will be recorded and which you can review electronically at your convenience. This can occur prior to making your decision on which candidates to invite for an interview at a cost of \$100 per candidate.

LEADERSHIP/PERSONALITY TESTING

MGT has experience working with a wide variety of leadership and personality assessment tools, depending on the qualities and experiences the City is seeking in their candidates. These include but are not limited to Luminaspark, Caliper, DISC, and others. Depending on the evaluation type, selected fees can range between \$100 to \$500 per candidate.

360° EVALUATION

As a service to the City, we offer the option of providing you with a proposal for a 360° performance evaluation for the appointed position at six months into their employment. This evaluation will include seeking feedback from both elected officials and department directors, along with any other stakeholder the City feels would be relevant and beneficial. This input will be obtained on a confidential basis with comments known only to the consultant. If you are interested in this option, MGT will prepare a proposal for this service.



Additional Materials

- Sample Brochures
- Sample Recruitment Portfolio



Germantown, Tennessee
PUBLIC WORKS DIRECTOR

MGT

Germantown, Tennessee

Public Works Director



The City of Germantown is a vibrant, welcoming community, the community of choice, offering outstanding quality of life for all generations. The government is resilient and fiscally sound, providing top-quality public safety and services responsive to community requirements. Engaged residents honor the past, treasure the present and responsibly shape Germantown's future.

ABOUT GERMANTOWN:

Germantown, where tradition meets innovation and Southern charm defines our community. Whether you're a long-time resident or new to the area, you will share a sense of pride in the community.

With a population of 41,333 and a medium household income of \$140,429, Germantown is a thriving city that blends graciousness with forward-thinking vision. Its exceptional offerings include award winning schools, top notch public safety services and a cultural-hub- the Germantown Performing Arts Center. Dining, retail, parks and recreation – Germantown has it all. Its culinary scene caters to every palate, and parks are where the community comes together for relaxation.

OUR COMMUNITY VALUES:

- A culture of excellence and kindness
- Community strength, health and sustainability
- Excellence in education
- Innovation, creativity and continuous improvement
- Lifestyle opportunities as part of the fabric of everyday life
- Local and regional partnerships
- Modern and reliable public infrastructure
- Natural and designed beauty and strategic growth

Germantown has one of the best school systems in Tennessee and is a point of pride in the community. The Germantown Municipal School District ensures that education excels, celebrating diversity and providing a welcoming environment for every child.

Safety is paramount in Germantown, with first responders ensuring a secure environment and a cardiac arrest survival rate four times higher than the national average. Germantown also has one of the lowest crime rates in Tennessee for communities its size.

Excellence is not just a goal; it's a way of life in Germantown. It's a vibrant community, where every day is an opportunity to connect, thrive and experience the best of Southern living.

As part of the Memphis metropolitan area Germantown is an easy 30- minute drive to professional sports teams including the NBA Memphis Grizzlies and the Memphis Red Birds (St Louis Cardinals AAA team) and Elvis Presley's Graceland and the rhythm and blues of Beale Street.



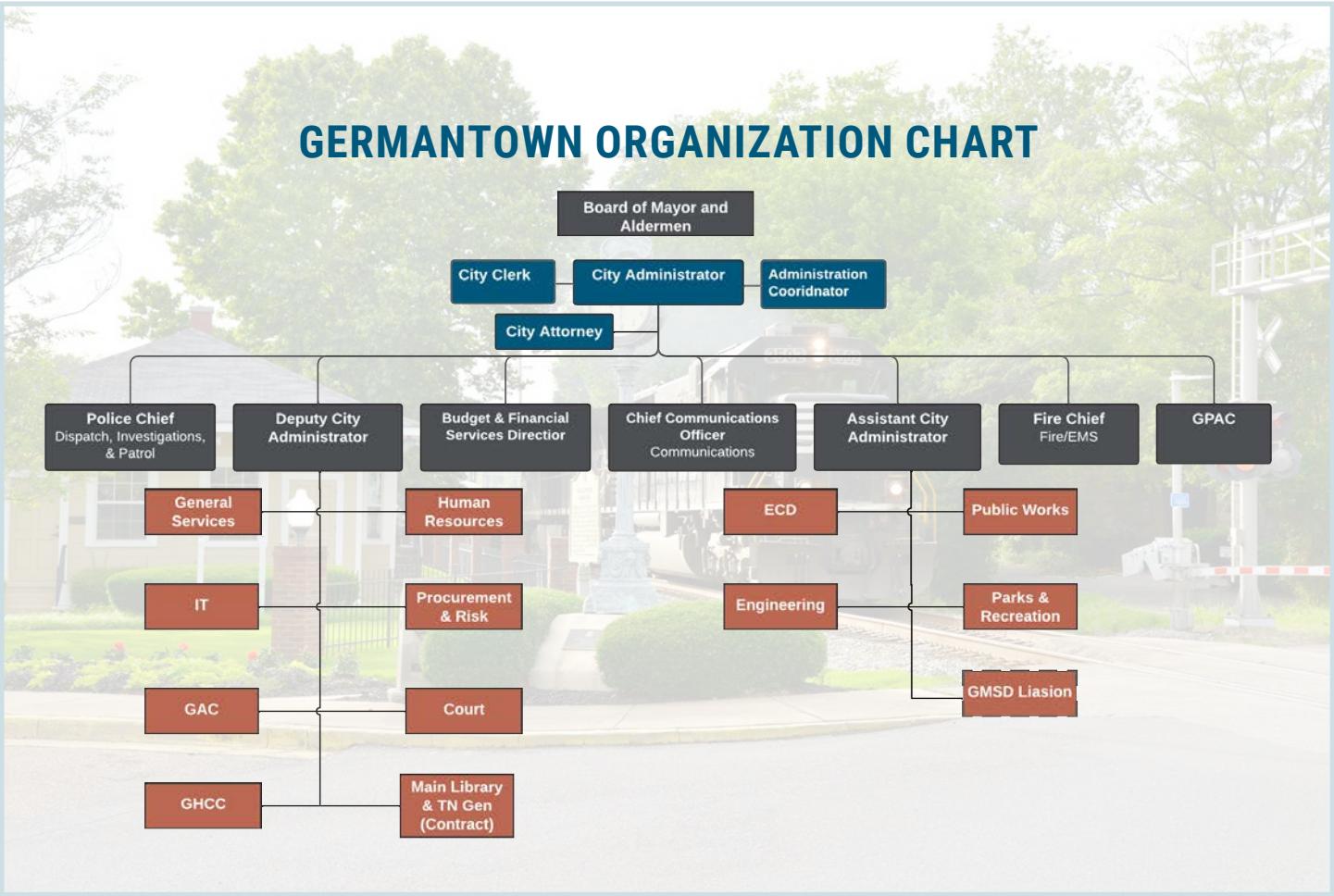
THE ORGANIZATION:

The City of Germantown values employees and realizes that they are the ones that bring the City’s motto of “Excellence, Every Day” to life. It’s an exciting time to work for the city. The City’s government is recognized for its professionalism and innovative service delivery. Germantown has received the Malcolm Baldrige Award by the U.S. Department of Commerce; this achievement distinguishes Germantown as a world class community.

This position touches two of Germantown’s four Ps and makes all four Ps possible- Public Schools, Public Safety, Public Infrastructure & Parks.

THE POSITION:

This is a critical leadership role responsible for overseeing the efficient and effective delivery of essential public services, with a direct impact on the quality of life for the residence. The Public Works Director reports to the Assistant City Administrator who reports to the City Administrator. The Director of Public Works plays a critical role in the planning and development process for three of the Germantown 2035 key performance areas: Land Use and Transportation, Natural Resources and Quality of Life.





KEY RESPONSIBILITIES:

- Oversee a department with an annual budget of \$27 million and a staff of 59 dedicated employees.
- Direct and manage the construction, maintenance, and repair of city streets and storm drains.
- Administer the city's solid waste contract, ensuring effective and environmentally responsible waste management.
- Oversee the maintenance and operation of the city's water and sanitary sewer collection system, including two twelve million gallons per day water treatment plants.
- Ensure the smooth operation of the city's animal control services, maintaining high standards of public health and safety.
- Provide strategic leadership and direction to the Public Works Department, fostering a culture of excellence and accountability
- Collaborate with the Assistant City Administrator and other city officials to develop and implement policies and procedures that enhance public services.
- Ensure compliance with all federal, state, and local regulations related to public works and environmental services.



QUALIFICATIONS:

- Bachelor's degree in Engineering, Environmental Science, or a related field.
- A minimum of 7 years of experience in environmental services, public works, or a closely related field, with at least 3 years in a managerial role.
- Proven ability to manage large budgets and lead a diverse team.
- Strong knowledge of public infrastructure, water and sewer systems, solid waste management, and environmental regulations.
- Exceptional communication and leadership skills, with the ability to effectively interact with city officials, staff, and the public.
- Professional Engineer (PE) license preferred

IDEAL CANDIDATE:

- Knowledge of the fundamental principles and accepted practices of engineering; modern methods and techniques of civil engineering as applied to the design, construction, and maintenance of municipal infrastructure and utilities
- Experience in the operation of water and sewer utilities
- Strong communication, team collaboration, and customer service skills
- Experience working in a high performing organization

COMPENSATION:

The salary range for this position is \$131,277 to 154,398. In addition, the City of Germantown offers a competitive benefits package.

HOW TO APPLY:

Apply by September 27, 2024, with a resume, cover letter, and contact information for (5) professional references to the attention of: W. Lane Bailey, MGT Executive Recruiter, MGT Tel 847-380-3240 ext. 140.

The City of Germantown is an Equal Opportunity Employer.



DIRECTOR OF PUBLIC WORKS

BURLINGTON, WISCONSIN



DIRECTOR OF PUBLIC WORKS BURLINGTON, WISCONSIN

THE POSITION IN BRIEF

The Director of Public Works in Burlington is a key member of the City's management team. The Director is responsible for leading a department of 23 full-time employees and managing combined general fund and enterprise budgets of more than \$9 million.

THE COMMUNITY

Incorporated in 1886, [Burlington](#) is a growing, full-service community in Racine County approximately 30 miles southwest of Milwaukee and 70 miles northwest of Chicago. Burlington is located at the junction of the White River and Fox River in southeastern Wisconsin.

The first land claim in the area by European settlers was made around December of 1835, when Moses Smith and William Whiting carved their names and date on trees near the present Standard-Press building on Pine Street. Returning with Lemuel Smith and Benjamin Perce weeks later, the four built a shanty on the east side of the Fox River in what is now Wehmhoff-Jucker Park.

In 1836 Daniel Rork made a claim to land on which much of the early settlement was built. In 1837 Moses Smith was appointed postmaster of the settlement, then called Foxville. The name was changed to Burlington on July 15, 1839. After completion of the dam, sawmill and grain mill, the first bridge to span the Fox River was built.

More on the history of Burlington can [be found here](#).

Today, at nearly eight square miles, the community has grown from two to four, to more than 11,000 people. Burlington has excellent schools, an aquatic center, 28 parks, a thriving downtown and several successful industrial parks. The City is also experiencing residential growth along its southern corridor.

A SNAPSHOT OF BURLINGTON'S DEMOGRAPHICS AND AMENITIES:

Average age of **37.9** years old

White (non-Hispanic) **88%**, African American/Black **1%**, Hispanic **10%**, Asian **1%**

Median household income: **\$80,529**

Median value of a Burlington home: **\$321,426**

Burlington educates more than **4,000 students** in **ten** high-achieving facilities. Burlington schools are nationally recognized for excellence in education, and a full spectrum of schools are available for students at each level. Burlington is home to quality [public schools](#) as well as parochial schools and the area's technical college.

Higher education is available at a host of campuses within a short distance of Burlington. Approximately **18 colleges and technical institutes** are within a two-hour drive of the community.

An abundant supply of inexpensive **water and sewage** treatment capacity.

Easy access to Interstates **43** and **94**, and short drives to Milwaukee, Madison and Chicago.

Burlington residents are served by an [abundance of passive and active parks \(28\) and recreation facilities](#).

Full **library services** are provided by the [Burlington Public Library](#).

Comprehensive full **health care** and easily accessible in-patient hospitals are found throughout Racine County and nearby Milwaukee and Kenosha counties.



CITY GOVERNMENT IN BURLINGTON

The city is governed under a Mayor/Common Council/City Administrator form of government. The Mayor is elected at large for a two-year term. There are eight Common Council members, two representatives from each of the four Aldermanic Districts, also elected for two-year terms. [The Mayor and Common Council](#) appoint a full-time [City Administrator](#) who is the chief administrative officer of the City. Carina Walters has been Burlington's City Administrator for nine years.

The City's mission statement: The mission of the City of Burlington is to build and enhance our community by safely, respectfully, proudly and effectively executing our daily work activities. As an organization we are committed to continuous improvement.

The City is currently updating its strategic plan which is the foundation for staff's short- and long-term workflow.

The City provides all of the other traditional services such as police, fire (combination volunteer/ full-time department), EMS airport, inspectional services, administrative services (Administrator, HR, finance, clerk, assessor, attorney) and a full-service municipal library.



PUBLIC WORKS IN BURLINGTON

The Public Works Department offers a wide range of services. The streets division provides traditional public works services including the maintenance of public streets and drainage ways, and winter snow plowing, as well as maintenance of street signs and traffic signals. The parks program is responsible for maintaining public facilities, outdoor parks, and recreation facilities. Public utilities have two areas: water and wastewater. The Water division assures adequate water flows and pressures for public consumption and firefighting purposes. Water is obtained from five wells, with an average daily usage of 2.5 million gallons (peak capacity of 5.5 million gallons). The wastewater division is responsible for the treatment and disposal of all wastewater that is generated in the sanitary sewer service area (SSA). The SSA includes City of Burlington, Bohner's Lake Sanitary District, and Brown's Lake Sanitary District.

The Department has approximately 23 full-time employees plus 7 – 10 seasonal workers, and a budget of more than \$9 million in general fund and enterprise budgets.



THE PUBLIC WORKS DIRECTOR

The Director of Public Works is an integral part of Burlington's management team, requiring well-developed leadership abilities and management skills that are based upon consensus building and problem solving. The next Director must have a strong desire to work in a collegial, team-oriented environment. He/she must be a highly motivated, self-starting, and confident individual with excellent interpersonal skills.

In the ideal, the next Director must have a demonstrated track record in project management, leadership and staff development, effective customer service, and experience with capital improvement construction. Candidates should possess strong and creative problem-solving skills, as well as be adept at public presentations in a team-management approach. The Director's position requires a view of the entire blackboard of Public Works services to assure continuity of attention, and effective integration with all infrastructure-related demands.

Staff management: Burlington's diverse set of public works services is its strength and its challenge, requiring a broad set of knowledge and skill from its next Director. In a fast-paced, high-volume workload, staff works hard to keep each other informed and will welcome a Director who is well-rounded and knowledgeable in the disciplines of the department, one who will lead, collaborate, and be open to ideas, while also holding their work accountable.

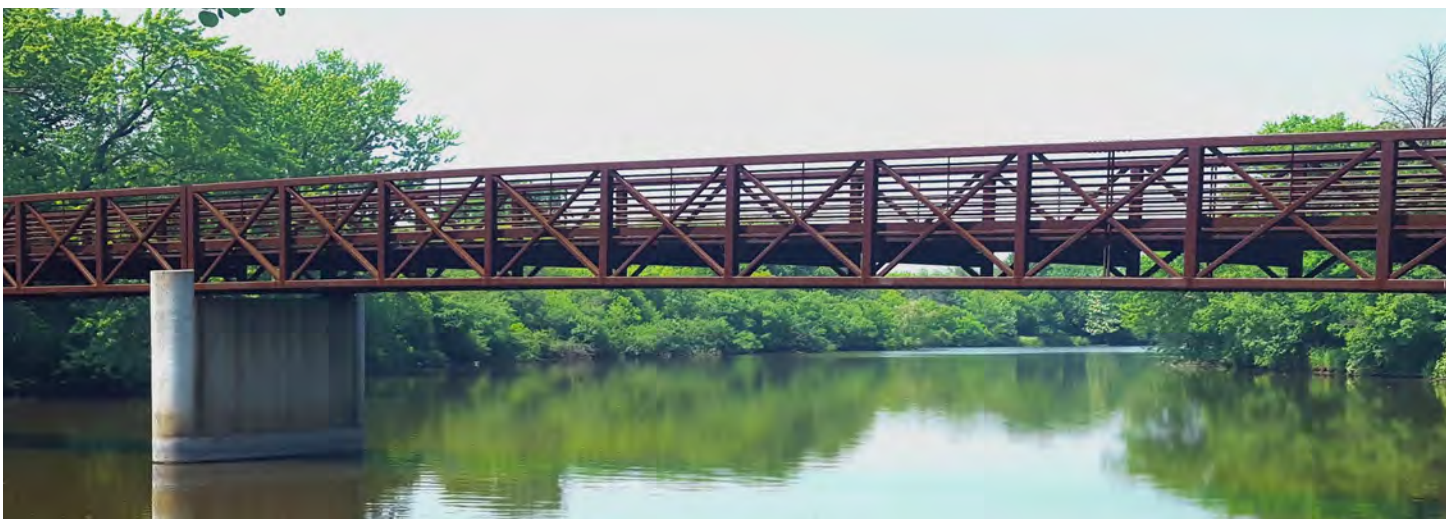
The Public Works Director's job is demanding, and each day typically includes fielding requests from a variety of sources, participating on the development team and managing the many and varied divisions of the department. The next Director will need to be skilled in multi-tasking and have the ability to develop a strong working relationship with the City Administrator, the elected officials, fellow department heads, and Public Works employees ranging from division heads to the rank-and-file.

The next Director inherits a staff with tenures ranging from one to more than 25 years, complemented by a strong work ethic. Turnover in the last few years, largely due to retirements, has been about 30%. Consequently, there are some positions needing to be filled in a challenging employment market.

City leadership and the Director's position:

The City's management team is a solid, energetic group that is in-tune with the Common Council's and the community's expectations. Within this framework of a close-knit executive group where daily contact among the management team can be anticipated, the new Director can expect this assembly of management leaders to be a resource, welcoming the Director with the tools he/she may need to be an inclusive and responsive leader in the department, and the overall organization.

Infrastructure: Like many maturing Midwest municipalities, Burlington has a long list of demands on its aging infrastructure. Coupled with financial challenges to raise revenues which is restrained by the state's tax levy limits on municipalities, the next Director of Public Works can expect to be part of a City team tasked with addressing significant infrastructure needs and limited resources. Therefore, adeptness at addressing a robust list of needs and demands in a fiscal environment of competing demands is required.





Upcoming Projects: Some of the City's strategic initiatives, projects and programs as they are related to Public Works include:

Echo Lake Dam: Within the last few years the community was faced with the costly and potentially community-altering decision of replacing or removing its aging [Echo Lake dam](#). Replacing the dam promised to be expensive. Alternatively, removing the dam, while less-costly, would significantly change the decades-long enjoyment and aesthetics of an impoundment area.

The community weighed in on the matter via referendum in late 2022 with about 60% supporting replacement. With that input in mind, one year later the Common Council decided that replacing the dam was most appropriate. The project is in its design phase, and the next Director of Public Works can expect to take a visible and active role in moving forward this highly-visible project.

Reconstruction of Downtown Streets. Pine Street serves as Burlington's "Main Street," an arterial road serving a vibrant downtown commercial district. The roadway, as does adjacent Chestnut Street, needs to be fully reconstructed in the next couple years. The new Director of Public Works can expect to take a central role in guiding the elected officials, business leaders and other community stakeholders through all the crucial phases of a project of this magnitude, ensuring that all voices are heard, and all visions are plumbed, all within the context of what is financially feasible.

Master plans have recently been updated, or are in the process of development, including the five-year Parks and Open Space plan, a water system master plan, a stormwater master plan, wastewater master plan (2025) and as previously mentioned, the City's strategic plan. All plans will present significant community goals for the Public Works department.

Stormwater Utility Study. Several years ago, the City examined the idea of creating a stormwater utility as a means in which to create some financial headroom in order to address the on-going challenges of stormwater management. The initiative failed in 2021, yet many city officials feel the time is ripe to reexamine the matter. As such, a stormwater master plan is in initial phase. The next Director will need to possess the politically-neutral savviness and fiscal acumen on when and how to reassess the issue.

Future planning for housing growth. Burlington is a community that continues to attract new residential and commercial development. The next Director should possess the ability to anticipate and plan for the impacts that growth presents to the City's infrastructure.

THE IDEAL CANDIDATE

Must Haves –

The City is seeking proven, progressive, and passionate-for-public-service candidates committed to excellence in the delivery of public works services. Candidates should have an equivalent combination of education, training and experience which provide the required knowledge, skills, and abilities as outlined below:

Education and Experience

- A bachelor's degree in civil engineering, construction management, public administration, or an engineering-related field, or an associate's degree in one of these disciplines plus three years of experience.
- Comparable successful employment experience performing similar essential duties and responsibilities may be considered in substitution for a degree.
- Candidates with city management experience, yet significant work in public works, are also encouraged to apply.
- Five years of experience in the supervision and management of public works operations, utility operations and/or road construction is ideal.
- Excellent interpersonal, communication and listening skills with a variety of stakeholders.
- Have management experience in creating an environment of trust, integrity, and mentorship where employees respect one another and where the Department consistently functions at a high level of customer service.
- Have experience in preparing and presenting complex department budgets, complemented with an understanding of the principles of government budgeting, recognizing the long-term cost implications of proposed new programs.
- Have a demonstrated ability to provide strategic leadership and long-range planning practices.
- Have a history of assessing the skills and abilities of existing personnel in an effort to maximize their talent and expertise, including opportunities for employees to take on new challenges as professionals.
- Have proven verbal communication and listening skills, both one-on-one and in a public speaking venue, treating everyone in a professional and respectful manner.
- Have successful experience in collaborating and interacting with other internal organizational units; experience with external organizations in a constructive, cooperative, and mutually supportive manner while representing the City's interests tactfully and firmly.
- Have the ability to make effective presentations before the Common Council; possess strong public relations experience and have excellent writing skills.



MANAGEMENT STYLE AND PERSONAL TRAITS

- Have complete personal and professional integrity, gaining respect and inspiring the trust and confidence of subordinates, co-workers, elected and appointed officials, as well as the general public.
- Be a clear, concise and strong communicator. Be able to present complex technical information to any audience in a manner that is understandable and jargon-free.
- Have a genuine passion for public service from both an internal, department standpoint and for service to the community; be devoted to customer, community and departmental service.
- Be a highly motivated, goal-oriented leader with a proven ability to quickly earn respect, gain cooperation and communicate clear direction.
- Be a positive, open and flexible team builder who is committed to the well-being of the staff, one who works with staff to identify departmental needs and find solutions which meet those challenges.
- Be comfortable "managing by walking around" and genuinely engaging with staff on a regular basis.
- Be a manager who both defends his/her staff when appropriate and holds the team accountable.
- Be proactive, anticipatory, and innovative; be someone who can make difficult decisions and stand behind those decisions. Be able to employ diplomacy under pressure.
- Have an open, friendly personality and communication style and a calm demeanor; be one who can establish trust quickly with others.
- Be skilled at keeping the City Administrator, Mayor and Common Council apprised of major activities and operations of the department in a consistent and timely manner, passing on both good news and bad news in a tactful, self-confident, and professional manner.



COMPENSATION AND BENEFITS

A starting salary range is \$106,000 - \$112,000 (midpoint) +/- DOQ, and an excellent benefit package including a pension program through the Wisconsin Retirement System is offered.

HOW TO APPLY

Candidates should apply by July 26, 2024 with resume, cover letter and contact information for five work-related references to www.GovHRjobs.com to the attention of Lee Szymborski, Senior Vice President, GovHR USA/MGT, 630 Dundee Road, #225, Northbrook, IL 60062. Tel: 847-380-3240. The city is an Equal Opportunity Employer.



CITY OF ANYTOWN, USA
CITY MANAGER



RECRUITMENT PORTFOLIO



Mr. Jacob Schmidt
City of Anytown
123 Right Way Drive
Anytown, IL 65432

Dear Mr. Schmidt,

This report contains the application materials for the five candidates selected for an interview on Wednesday, May 18th.

For use in the selection process, the enclosed materials provide each candidate's career overview and comparative data, resume, application materials, suggested interview questions, and an interview evaluation form.

Additional background work including felony court records searches and motor vehicle records searches are being conducted. We will be prepared to review this information during the interview process if necessary.

We look forward to being of continued assistance as you conclude this recruitment. Sincerely,



Heidi J. Voorhees President
GovHR USA, LLC

City of Anytown
City Manager Candidates

Recommended for Interview Consideration
Presented in Alphabetical Order

Candidate 1	Joe W. Carter City Administrator City of Mary, Georgia
Candidate 2	Sally P. Jerome Interim City Manager City of Maclin, Illinois
Candidate 3	Walter L. Miller City Administrator City of Mytowne, Illinois



City of Anytown
City Manager Interview Schedule

Wednesday, May 18th

10:00 a.m. – 11:00 a.m.	Joe W. Carter
11:00 a.m. – 12:00 p.m.	Sally P. Jerome
12:00 a.m. – 1:00 p.m.	Lunch Break
1:00 p.m. – 2:00 p.m.	Walter L. Miller
2:15 p.m.	Deliberations

Thursday, May 19th

9:00 a.m.	Candidate A
10:00 a.m.	Candidate B

Candidate 1

Joe W. Carter

Contact Information

Address: 6444 Mary Street
Mary, Maryland 23502

Cell: 240-555-7777

Email: jcarter@xxx.com

Education

- Master of Public Administration, 1986
University of South Dakota, Vermillion, South Dakota
- Bachelor of Science – History, 1984
University of South Dakota, Vermillion, South Dakota

Work History

1993 to Present

City of Mary, Maryland (population 21,000)

City Administrator

1988 to 1993

Town of Jackson, Maryland (population 3,551)

Town Manager

1986 to 1988

Village of Cherry, Ohio (population 4,800)

Village Manager

1985 to 1986

City of Jasper, South Dakota (population 10,000)

Assistant to the City Manager

Data Summary:

Candidate:	Joe W. Carter
Organization:	City of Mary, Maryland
Position:	Former City Administrator
Organization Budget:	\$36 million
Total Number of Employees in Organization:	260
Salary:	\$96,000
Expected Salary:	\$120,000-\$130,000
Reporting Relationship:	Reported to the Mayor & City Council
Years of Experience:	34

Professional Affiliations:

- International City/County Management Association
- Maryland City/County Management Association
- Maryland Municipal League

August 1, 20xx

Heidi Voorhees
GovHR USA
630 Dundee Road, Suite 130
Northbrook, IL 60062

Dear Ms. Voorhees,

Please accept the attached resume as application for the position of City Manager with the City of Anytown, Illinois as outlined in the executive search recruitment profile.

As you will note in my resume I would be able to bring over 28 years of the education and experience that you address in your recruitment notice.

I believe you will find that my professional experiences are extremely compatible with the qualifications that the officials of the City of Anytown are looking for in your next City Manager. I have attempted in my list of references to provide you and the others participating in this selection process a cross section of individuals who would be able to address many of the accomplishments that I have been able to participate in during my tenure in Mary, Maryland. The past nearly twenty (20) years have been a time of tremendous professional and personal growth for me as we have attempted to streamline a local government that for many years was mired in inefficient and ineffective government practices. The elected officials that I have had the opportunity to be employed by and work with provided me with the greatest latitude and guidance that anyone in this profession could enjoy. I hope you have an opportunity to talk with the references provided so that a full picture of Mary can be made.

I would look forward to returning to the Midwest and closer to my family that still reside in the South Dakota and Minnesota area.

If you have any further questions or desire further information please do not hesitate to contact me.

Respectfully,

Joe W. Carter

Joe W. Carter
6444 Mary Street
Mary, Maryland 31502
240-555-7777
jcarter@xxx.com

OBJECTIVE:

To continue to develop my professional skills and advance in my chosen career of professional public management.

EDUCATION:

Master of Public Administration, University of South Dakota, Vermillion, South Dakota. Minor area of study in Public Finance, Graduated May 1986.

Bachelor of Science in History, University of South Dakota, Vermillion, South Dakota., Minors in Political Science and Computer Science. Graduated May 1984.

PRESENT WORK EXPERIENCE:

City Administrator City of Mary, Maryland
(September 1993-Present)

For nearly twenty years I served as the City Administrator of Mary, which is a full-service city of 21,000. Mary is located approximately two hours from Pittsburgh, PA, Baltimore, MD and Washington, DC. The City has a full-time work force of approximately 270. The City provides the following services which are under the direction of the City Administrator; police protection, full-time fire protection and ambulance service, parks and recreation, public works, engineering, community development (which includes federal urban programs in Section 8 housing and management of the City's annual entitlement from the Community Development Block Grant program), and administration (includes the Departments of Finance and Management Information Systems). The City also provides water and wastewater services for the both the City and the surrounding region with a population of approximately 50,000.

Mary is a Council-Manager community and I serve at the pleasure of a five-member elected at-large Mayor and City Council.

Management accomplishments during my tenure are:

Reorganization of the City government from 16 different divisions into 8 specific departments (1995) and then 8 departments into 4 (2002) with day-to-day management of the departments by appointed Directors appointed by the City Administrator.

Implementation of a pay classification and compensation plan for all full-time employees that resulted in four separate unions and management coming under one pay table and adoption of new job descriptions for all employees.

Served as lead negotiator in contract negotiations with two AFSCME/Public Works unions, IAFF/Fire and UFCW/Police on behalf of the City.

Initiated a “reengineering” process with the Department of Utilities/Public Works and the AFSCME union to make the department more competitive and attempt to avoid “contract operations” by the private sector of the City utilities.

Used technology throughout the City government that includes all relevant data processing functions but also e-mail communications, electronic storage of current city records and documents, electronic imaging of past city records and documents, SCADA for utilities, in-car police computers, VOIP telephone protocol and automated meter reading of utility accounts.

Initiated the reorganization of the Department of Community Development and oversaw the adoption of a new comprehensive plan, development of the City’s first strategic plan, adoption of a revised zoning code consistent with both plans and the City’s first economic development plan.

Oversaw the redevelopment of historic Downtown through adoption of local tax incentives and acquisition of several state grants leading to upper story revitalization and renovation of several major buildings. This led to over \$ 50 million dollars in public/private investment and over 200 new jobs. Participated in the implementation of Maryland’s first Heritage Area, and the efforts in revitalizing the historic Downtown area. I also served for four years on the authority board as a voting member.

Restructured the City’s several million in long-term debt and have overseen the issuance of \$50 million in new long-term debt to cover the cost of a variety of public works projects involving bridge replacements, upgrade to the Water Filtration and Wastewater Treatment Plants, Combined Sewer Overflow improvements, road projects and improvement to public facilities.

Implemented the City’s first Tax Increment Financing District and second Special Taxing District for a medical park.

Implemented a city “Wi-Fi” system.

PAST WORK EXPERIENCE:

Town Manager Town of Jackson, Maryland (1988-1993)

Between 1988 and 1993 I served as the Town Manager of Jackson, which was a full-service community of 3,551. This was a contractual position to a three-member elected at large Town Council.

Management accomplishments during my tenure were:

Application and receipt of over \$ 1.25 million in grant funds for a variety of public improvement and works projects.

Construction of a nature trail and redevelopment of two town parks.

Construction of a multi-purpose community pavilion and renovation and expansion of a community/senior center

Administration of a \$ 2.5 million renovation of the town wastewater treatment facility.

Installation and management of a \$ 50,000 computer system.

Development and establishment of a successful town-wide recycling program.

Responsibility for total revision of the Town Zoning Code and Code of Ordinances.

Establishment of employee merit pay system and revision of Town’s personnel policy.

**Village Manager
Village of Cherry, Ohio
(1986-1988)**

For two and one-half years prior to accepting the position in Jackson, I served as the Village Manager of Cherry that was a community of 4,800. In that position I served a seven-member Council.

Management accomplishments during my tenure were:

- Completion of a village-wide sanitary sewer system.
- Participation in the adoption of a Council-Manager form of government.
- Establishment of a contracted municipal trash system.
- Revision to the process and adoption of the Village budget.
- Redistricting of the Village election process.
- Negotiations with the police union

Assistant to the City Manager City of Jasper, South Dakota (1985-1986)

While attaining my Master of Public Administration I worked full-time for a year and one-half as the Assistant to the City Manager of Jasper (pop. 10,000). This high involvement administrative position provided me the following activities:

- Providing reports and analysis to the City Manager and nine-member City Council
- Reformatting of the City budget to a computer format.
- Development and installation of a telecommunication system to all municipal buildings.
- Direct responsibility for preparation and implementation of the \$ 10 million City budget.
- Liaison between the City Manager and nine Department Heads.
- Participant in labor negotiations with City Manager and labor union.

PROFESSIONAL ORGANIZATIONS:

- Full Member of the International City/County Management Association (ICMA).
- Member of the Maryland City/County Management Association (MCCMA).
- Maryland Municipal League

CITY OF ANYTOWN SELECTION PROCESS

Interview and Candidate Evaluation Guide

In order to provide common bases of comparison, all Candidates should be asked the same major questions. Inevitably, the discussion will vary; however, when a point arises in one interview that appears to have an important bearing upon a Candidate's qualifications, an attempt should be made to raise the same point with other Candidates as well.

The interview panel will decide prior to the start of the interviews what questions are to be asked, and who should ask each particular question. Following the initial response of the Candidate to a question, others should then feel free to ask further related questions for purposes of seeking clarification or illustrations.

Questions should relate to past experience of the Candidate and to particular characteristics and needs/expectations of the City Manager position. It is recommended that you be very candid in asking questions and attempt to resolve all "ifs" or confusion regarding a Candidate's philosophy, management style, etc.

In order to capture your reactions and thoughts following each Candidate's interview, you may wish to make notes on this Interview Guide regarding Candidates' responses to each question of particular interest to you. You may also wish to complete the Candidate Evaluation Form included for each candidate. This will be helpful for you to reference when you will be sharing your impressions with each other and the Consultant.

Suggested "Library" of Questions

1. Welcome. We have your background materials in front of us and we have had a chance to review them. Tell us why the Anytown City Manager position is attractive to you.
2. In your background, what role did you play in developing and implementing a strategic/vision plan? What were the challenges incurred?

3. What has been your experience in developing a comprehensive capital plan? How detailed was the plan; how many years did the plan cover; and how was it updated and maintained?
4. What technique have you employed to reduce operating or program expenses, and how would you prioritize reductions or cuts?
5. Can you give us an example of an innovative technique which you developed to enhance revenues for your organization?
6. How would you describe your management and leadership style, and what steps would you take to establish a rapport with the employees and ensure that we will work together as a high functioning team?
7. What process do you use to ensure that projects and/or assignments you have delegated to your Department Heads are completed on time and meet your expectations and how do you communicate this to your staff?

8. How would you evaluate the performance of the Department Heads and the activities for which they have been assigned responsibility?

9. What are your long term professional goals? How does this position relate to them?

10. What do you consider to be your three (3) major strengths, and how are they important to the job of City Manager?

11. What is your philosophy with regard to contract/labor negotiations?

12. Give us an example of a politically sensitive situation you found yourself in, and explain how you handled that situation.

13. Being a City Manager is a stressful job. What do you like to do to relax and recharge yourself for when you get back in the office?

14. To you, which is more desirable: an organization that is run in an efficient business-like manner or an organization that is run in a personal and friendly way? Why?

15. What tenure could you reasonably consider committing to the City of Anytown?

16. Open Questions.

17. We've asked you a lot of questions today. What questions do you have of us, and would you like to add anything we didn't cover?

Thank you.

Candidate Evaluation Form City of Anytown - City Manager

Applicant Name:	Position:
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Please use this form as a guide to evaluate the applicant's qualifications for employment. Check the appropriate numeric value corresponding to the applicant's level of qualification and provide appropriate comments in the space below.

Rating Scale:	5. Outstanding 4. Excellent-exceeds requirements 3. Competent—acceptable proficiency	2. Below Average—Does not meet requirements 1. Unable to determine or not applicable to this candidate
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	Rating				
	5	4	3	2	1

INTERVIEW PRESENTATION – COMMUNICATION SKILLS					
General Impression-Professional Demeanor					
Leadership/Management Abilities -- Overall Confidence					
Relevant Background/Special Skill Set: Explore the candidate's knowledge and past working experiences					
Professional Impression: Consider self-confidence, maturity, and presence to assess the candidate's level of professionalism, inspiring personality					
Motivation/Initiative: Analyze applicant's ability to think and act independently, and goal orientation. Why do they want to be the City Manager?					
Interpersonal/Communication Skills: Assess ability to express ideas and thoughts clearly					
Understanding of the community, region, organization and position					
Flexibility: Assess candidate's responsiveness to change, tolerance for ambiguity.					
EXPERIENCE IN:					
Oversight of relevant departments					
Communication/collaboration with City team					
Challenges facing growing communities					
Local government budget development					
Economic development and innovation in economic development					

Candidate Evaluation Form **City of Anytown - City Manager**

Working with a diverse population and a commitment to diversity and inclusion					
Developing, mentoring and leading direct reports					
Working with partnerships – regional and public private					
Community outreach and community relations					
Working with the business community during the pandemic					
Experience in and commitment to excellence in customer service.					
Elected Officials – experience in developing positive relationships with all elected officials and in building consensus among elected officials					
Organizational Fit/Compatibility: Review the candidates’ potential to fit the city’s organizational culture.					
Overall Evaluation: Please add appropriate comments below:					

Comments (Please summarize your perceptions of the candidate’s strengths and any concerns that should be considered:

Candidate 2

Sally P. Jerome

Contact Information

Address: 980 Saginaw Lane
Hinsport, Illinois 60000

Cell: 847-555-1122
Work: 847-555-4433

Email: sjerome@xxx.net

Education

- Master of Public Administration, 1989
University of Illinois, Chicago, Illinois
 - Bachelor of Arts – Communication, 1984
University of Illinois, Chicago, Illinois
-

Work History

2004 to Present

City of Maclin, Illinois (population 2,300)

August 2012 to Present

Interim City Manager

2008 to August 2012

Assistant City Manager

2004 to 2008

Assistant to the City Manager

1998 to 2004

Village of Waveland, Illinois (population 34,000)

Assistant to the Public Works Director

1994 to 1998

YMCA of Metropolitan Chicago

Resident Services Director

1990 to 1994

City of Rose, Illinois (population 17,000)

1992 to 1994

Management Analyst, Public Works

1990 to 1992

Intern, City Manager's Office

Data Summary:

Candidate:	Sally P. Jerome
Organization:	City of Maclin, Illinois
Position:	Interim City Manager
Organization Budget:	\$ 5.4 million
Total Number of Employees:	47
Current Salary:	\$ 92,500
Expected Salary:	As advertised
Reporting Relationship:	Reports to the City Council
Years of Experience:	29

Professional Affiliations:

- International City/County Management Association
- Illinois City/County Management Association
- Illinois Association of Municipal Managers Assistants
- Illinois Public Employer Labor Relations Association
- National Public Employer Labor Relations Association

August 8, 20xx

Ms. Heidi Voorhees
President
GovHR USA
630 Dundee Road, Suite 130
Northbrook, IL 60062

Dear Ms. Voorhees,

Please accept my resume for the City Manager position. My experience as Assistant City Manager and Interim City Manager for Maclin has prepared me for this opportunity to serve. The attached resume details my professional experience, but I want to highlight certain areas of expertise and leadership.

Maclin has afforded me the opportunity of hands-on leadership where I effectively work with a small staff to carry out daily operations and accomplish the goals set by the elected body. Recently, I negotiated a traffic signal agreement with a shopping center owner, and am currently working with the City Engineer on a drainage program affecting private residences and reviewing proposals for a red light camera vendor. I work closely with the Chamber of Commerce to encourage businesses to move into or remain in the City by analyzing incentives and being responsive to their needs.

I am responsible for the preparation of the annual City budget and five year capital improvement plan. In 2009, working with the former City Manager, I developed an emergency financial plan and applied budget cut backs for the latter half of FY 10 and FY 11, reducing expenditures nearly 10 %. This was accomplished without union concessions or furloughs.

My demeanor is calm and professional. I am approachable, eager to better understand the pros and cons of an issue and prepared to lead. I look forward to interviewing to be the next City Manager for the City of Anytown, Illinois. You may contact me at (847) 555-1122.

Sincerely,

Sally P. Jerome

Sally P. Jerome
980 Saginaw Lane
Hinsport, Illinois 60000
(847) 555-1122
sjerome@xxx.net

PROFESSIONAL EXPERIENCE

CITY OF MACLIN, ILLINOIS

Interim City Manager

Assistant City Manager

Assistant to the City Administrator

Acting Building & Zoning Administrator

2004 – present

August 2012 – present

May 2008 – August 2012

2004 – May 2008

December 2006

- ◆ Prepare City Council agenda and participate at all City Council meetings.
- ◆ Manage \$5.4 million annual general fund budget submission to council.
- ◆ Coordinate, follow-up and summarize the city's two-year strategic action plan.
- ◆ Lead City's collective bargaining team. Perform economic contract costing.
- ◆ Direct all human resources and risk management programs and policies.
- ◆ Liaison to the Greater Maclin Chamber of Commerce Business Recruitment and Retention Team; liaison to the City Hotel Commission.
- ◆ Develop and implement municipal administrative policies.
- ◆ Supervise and evaluate all department heads and a number of support staff.
- ◆ Write proposal specifications, bid documents and execute contract documents.
- ◆ Editor-in-chief and head writer for city newsletter, web site and public access cable TV.
- ◆ Secured Illinois Clean Energy Community Foundation Grant.

VILLAGE OF WAVELAND, ILLINOIS

1998 - 2004

Assistant to the Public Works Director

- ◆ Prepared and submitted all department division budgets; monitored expenditures.
- ◆ Collective bargaining team member.
- ◆ Facilitated labor/management safety meetings; investigated and responded to grievances.
- ◆ Developed and implemented orientation program; created safety manual.

YMCA OF METROPOLITAN CHICAGO

1994 – 1998

Resident Services Director

- ◆ YMCA liaison to Greater North Michigan Avenue Association.
- ◆ Supervised housekeeping, front desk and security operations.
- ◆ Coordinated housing for residents during \$ 23M reconstruction of 21-story residence.
- ◆ YMCA liaison to construction management firm, during renovation.
- ◆ Completed annual budget and monitored expenditures.
- ◆ Developed and monitored resident payment plans.

CITY OF ROSE, ILLINOIS

Management Analyst, Public Works

Intern, City Manager's Office

1990-1994

1992-1994

1990-1992

- ◆ Acting Budget Manager. Coordinated and balanced \$100,000,000 budget.
- ◆ Analyzed contracted attorney fees to determine in-house savings.
- ◆ Analyzed boards and committees to consolidate and reduce duplication.
- ◆ Managed follow-through of Aldermanic service requests.
- ◆ Researched and reported on public works issues.

EDUCATION

MASTERS OF ARTS (MPA)

Public Administration

University of Illinois at Chicago

Graduated in 1989

BACHELOR OF ARTS (BA)

Communication

University of Illinois at Chicago

Graduated in 1984

PROFESSIONAL MEMBERSHIPS

International City/County Management Association (ICMA)

Illinois City/County Management Association (ILCMA)

Illinois Association of Municipal Managers Assistants (IAMMA)

Illinois Public Employer Labor Relations Association (IPELRA)

National Public Employer Labor Relations Association (NPELRA)

CITY OF ANYTOWN SELECTION PROCESS

Interview and Candidate Evaluation Guide

In order to provide common bases of comparison, all Candidates should be asked the same major questions. Inevitably, the discussion will vary; however, when a point arises in one interview that appears to have an important bearing upon a Candidate's qualifications, an attempt should be made to raise the same point with other Candidates as well.

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Questions should relate to past experience of the Candidate and to particular characteristics and needs/expectations of the City Manager position. It is recommended that you be very candid in asking questions and attempt to resolve all "ifs" or confusion regarding a Candidate's philosophy, management style, etc.

In order to capture your reactions and thoughts following each Candidate's interview, you may wish to make notes on this Interview Guide regarding Candidates' responses to each question of particular interest to you. You may also wish to complete the Candidate Evaluation Form included for each candidate. This will be helpful for you to reference when you will be sharing your impressions with each other and the Consultant.

Suggested "Library" of Questions

1. Welcome. We have your background materials in front of us and we have had a chance to review them. Tell us why the Anytown City Manager position is attractive to you.
2. In your background, what role did you play in developing and implementing a strategic/vision plan? What were the challenges incurred?

3. What has been your experience in developing a comprehensive capital plan? How detailed was the plan; how many years did the plan cover; and how was it updated and maintained?
4. What technique have you employed to reduce operating or program expenses, and how would you prioritize reductions or cuts?
5. Can you give us an example of an innovative technique which you developed to enhance revenues for your organization?
6. How would you describe your management and leadership style, and what steps would you take to establish a rapport with the employees and ensure that we will work together as a high functioning team?
7. What process do you use to ensure that projects and/or assignments you have delegated to your Department Heads are completed on time and meet your expectations and how do you communicate this to your staff?

8. How would you evaluate the performance of the Department Heads and the activities for which they have been assigned responsibility?

9. What are your long term professional goals? How does this position relate to them?

10. What do you consider to be your three (3) major strengths, and how are they important to the job of City Manager?

11. What is your philosophy with regard to contract/labor negotiations?

12. Give us an example of a politically sensitive situation you found yourself in, and explain how you handled that situation.

13. Being a City Manager is a stressful job. What do you like to do to relax and recharge yourself for when you get back in the office?

14. To you, which is more desirable: an organization that is run in an efficient business-like manner or an organization that is run in a personal and friendly way? Why?

15. What tenure could you reasonably consider committing to the City of Anytown?

16. Open Questions.

17. We've asked you a lot of questions today. What questions do you have of us, and would you like to add anything we didn't cover?

Thank you.

Candidate Evaluation Form City of Anytown - City Manager

Applicant Name:	Position:
-----------------	-----------

Please use this form as a guide to evaluate the applicant's qualifications for employment. Check the appropriate numeric value corresponding to the applicant's level of qualification and provide appropriate comments in the space below.

Rating Scale:	5. Outstanding 4. Excellent-exceeds requirements 3. Competent—acceptable proficiency	2. Below Average—Does not meet requirements 1. Unable to determine or not applicable to this candidate
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	Rating				
	5	4	3	2	1

INTERVIEW PRESENTATION – COMMUNICATION SKILLS					
General Impression-Professional Demeanor					
Leadership/Management Abilities -- Overall Confidence					
Relevant Background/Special Skill Set: Explore the candidate's knowledge and past working experiences					
Professional Impression: Consider self-confidence, maturity, and presence to assess the candidate's level of professionalism, inspiring personality					
Motivation/Initiative: Analyze applicant's ability to think and act independently, and goal orientation. Why do they want to be the City Manager?					
Interpersonal/Communication Skills: Assess ability to express ideas and thoughts clearly					
Understanding of the community, region, organization and position					
Flexibility: Assess candidate's responsiveness to change, tolerance for ambiguity.					
EXPERIENCE IN:					
Oversight of relevant departments					
Communication/collaboration with City team					
Challenges facing growing communities					
Local government budget development					
Economic development and innovation in economic development					

Candidate Evaluation Form **City of Anytown - City Manager**

Working with a diverse population and a commitment to diversity and inclusion					
Developing, mentoring and leading direct reports					
Working with partnerships – regional and public private					
Community outreach and community relations					
Working with the business community during the pandemic					
Experience in and commitment to excellence in customer service.					
Elected Officials – experience in developing positive relationships with all elected officials and in building consensus among elected officials					
Organizational Fit/Compatibility: Review the candidates’ potential to fit the city’s organizational culture.					
Overall Evaluation: Please add appropriate comments below:					

Comments (Please summarize your perceptions of the candidate’s strengths and any concerns that should be considered:

Candidate 3

Walter L. Miller

Contact Information

Address: 5498 Tazewell Drive
Libertyville, Illinois 60048

Home: 847-622-1234

Cell: 847-999-9876

Work: 847-450-5000

Email: wmiller@xxx.org

Education

- Master of Public Administration
University of Kansas, Lawrence, Kansas
- Bachelor of Arts – Political Science
University of Wisconsin, Madison, Wisconsin

Work History

2002 to Present

City of Mytowne, Illinois (population 30,000)

City Administrator

1996 to 2003

City of Smith, Missouri (population 36,500)

Assistant City Manager

1994 to 1996

ABC Crime Commission, Wichita, Kansas

State Coordinator, Community Development Division

1993 to 1994

City of Rock, Kansas (population 310,000)

Management Intern

Data Summary:

Candidate:	Walter L. Miller
Organization:	City of Mytowne, Illinois
Position:	City Administrator
Organization Budget:	\$55.2 million
Total Number of Employees in Organization:	150 full-time
Current Salary:	\$107,630
Expected Salary:	\$170,000
Reporting Relationship:	Reports to the Mayor & City Council
Years of Experience:	26 years

Professional Affiliations:

- International City/County Management Association
- Illinois City/County Management Association
- Illinois Municipal League
- Southwestern Illinois City Management Association
- St. Louis Area City Management Association

Walter L. Miller
5498 Tazewell Drive
Libertyville, Illinois 60048

August 5, 2019

Heidi J. Voorhees
Co-Owner
GovHR USA
630 Dundee Road, Suite 130
Northbrook, IL 60062

Dear Ms. Voorhees:

This letter is in response to the opening of City Manager with the City of Anytown, Illinois. I believe my experience and education give me the knowledge, enthusiasm, and creativity to face the challenges of the position.

I currently serve as the City Administrator for the City of Mytowne, Illinois. Mytowne is a full- service city government, providing police, fire, parks, water, and sewer. Mytowne is a rapidly growing suburb and I have managed many development challenges during my nine-year tenure.

My management style is participatory and team-oriented. Mytowne's Team Management Program seeks input from all levels of the organization to face the City's challenges. I have used my collaborative management style to empower department heads and employees to be innovative and creative when developing such projects as the Performance Measurement Balanced Scorecard and Comprehensive Plan.

As the economy declined, we implemented several measures that allowed us to reduce our staff by 12% yet continue the high level of service our citizens expect. We are currently restructuring our budget according to the concepts described in "The Price of Government" that integrates citizen engagement and City Council priorities with a comprehensive program inventory.

These examples demonstrate my participative style of city management and community leadership. It is my goal to be a city manager in a dynamic city that will provide opportunities and challenges. I believe Anytown is that kind of city. I appreciate your consideration of my enclosed resume. Please contact me if you have additional questions.

Best regards,

Walter L. Miller

Walter L. Miller

5498 Tazewell Drive
Libertyville, Illinois 60048
Email: wmiller@xxx.org

Home: 847.622.1234
Cell: 847.999.9876

Job Objective City Manager

Work Experience

2002-Present

City Administrator, City of Mytowne, Illinois: A full-service city serving a population of 30,000, with 150 full-time employees and \$20 million annual operating budget (\$69 million total budget).

Relevant Experience:

Finance and Management

Team Management: Team-oriented manager with an emphasis on facilitation, coordination, and communication.

Supervision: Manage and supervise all departments, including Police, Fire, Planning, Engineering, Streets, Water, Sewer, Parks, Finance, and Library.

Performance Management: Comprehensive performance measurement program with Performance Dashboard, Balanced Scorecard, and participation in the ICMA Center for Performance Measurement.

Annual Budget: Develop annual budget each year for the Mayor and City Council. Over the past three years, I have coordinated \$3.4 million in budget cuts and a 12% reduction in workforce (one layoff) while maintaining service levels.

Growth Management

Subdivision Ordinance: Overhauled subdivision regulations including a Park Land Dedication provision.

Comprehensive Plan: Conducted complete update to long range plan.

Development Design Standards: Developed a Commercial Design Handbook and Residential Visual Preference Survey that defined standards for both commercial and housing architecture, streetscaping, green space, sustainability, and density requirements.

Zoning Code: Updated all ordinances in the Zoning Code, including signs, planned uses, environmental, and special uses.

Transportation Plans: Developed road plans for high growth residential areas to promote connectivity and smooth traffic flow.

Library Master Plan: Conducted study of future needs for public library.

Economic Development

Tax Increment Financing District: Created two new TIF districts.

Special Service Areas: Innovative financing mechanism where the city issues bonds that are paid by the developer and city has no financial responsibility.

Financial Incentives: Developed sales tax rebates for major retail developments.

Sub Area Plans: Developed detailed plans for future business park.

New Facility Construction

Public Safety Facility: \$8 million Police/EMS facility constructed in 2004.

Family Sports Park: \$20 million, 203-acre park, Phase 1 in 2006, Phase 2 in 2010.

Conference Center: \$6 million, 60,000 sq. ft. building, constructed in 2008.

1996-2003

Assistant City Manager, City of Smith, Missouri: A full-service charter city government serving a population of 36,500, with 350 full-time employees and \$30 million annual operating budget.

1994-1996

ABC Crime Commission – State Coordinator, Community Development Division (Wichita, Kansas): A non-profit organization that conducted research on crime in Kansas.

1993-1994

City of Rock, Kansas – Management Intern: A full-service city government serving a population of 310,000, with 3,500 full time employees and \$309 million annual operating budget.

Education

Senior Executive Institute, University of Virginia, 2009

Credentialed Manager, ICMA, 2001

Master of Public Administration, University of Kansas, 1990

Bachelor of Arts, University of Wisconsin-Madison, 1988; Major in Political Science, Integrated Liberal Studies Certificate

Computer Skills

All Microsoft Office software: Word, Excel, Access, Outlook, PowerPoint

Mobile applications: Blackberry, iPad, Tablet

GIS applications

Social Media applications: Blog, Twitter, Facebook, Linked In

Activities and Affiliations

International City/County Management Association (ICMA)

Board of Directors, Illinois City/County Management Association (ILCMA)

City Managers Committee, Illinois Municipal League

President, Southwestern Illinois City Management Association (SWICMA)

Kansas University City/County Managers and Trainees (KUCIMAT)

Board of Directors, Rotary Club

CITY OF ANYTOWN SELECTION PROCESS

Interview and Candidate Evaluation Guide

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3. What has been your experience in developing a comprehensive capital plan? How detailed was the plan; how many years did the plan cover; and how was it updated and maintained?
4. What technique have you employed to reduce operating or program expenses, and how would you prioritize reductions or cuts?
5. Can you give us an example of an innovative technique which you developed to enhance revenues for your organization?
6. How would you describe your management and leadership style, and what steps would you take to establish a rapport with the employees and ensure that we will work together as a high functioning team?
7. What process do you use to ensure that projects and/or assignments you have delegated to your Department Heads are completed on time and meet your expectations and how do you communicate this to your staff?

8. How would you evaluate the performance of the Department Heads and the activities for which they have been assigned responsibility?

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16. Open Questions.

17. We've asked you a lot of questions today. What questions do you have of us, and would you like to add anything we didn't cover?

Thank you.

Candidate Evaluation Form City of Anytown - City Manager

Applicant Name:	Position:
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Please use this form as a guide to evaluate the applicant's qualifications for employment. Check the appropriate numeric value corresponding to the applicant's level of qualification and provide appropriate comments in the space below.

Rating Scale:	5. Outstanding 4. Excellent-exceeds requirements 3. Competent—acceptable proficiency	2. Below Average—Does not meet requirements 1. Unable to determine or not applicable to this candidate
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	Rating				
	5	4	3	2	1

INTERVIEW PRESENTATION – COMMUNICATION SKILLS					
General Impression-Professional Demeanor					
Leadership/Management Abilities -- Overall Confidence					
Relevant Background/Special Skill Set: Explore the candidate's knowledge and past working experiences					
Professional Impression: Consider self-confidence, maturity, and presence to assess the candidate's level of professionalism, inspiring personality					
Motivation/Initiative: Analyze applicant's ability to think and act independently, and goal orientation. Why do they want to be the City Manager?					
Interpersonal/Communication Skills: Assess ability to express ideas and thoughts clearly					
Understanding of the community, region, organization and position					
Flexibility: Assess candidate's responsiveness to change, tolerance for ambiguity.					
EXPERIENCE IN:					
Oversight of relevant departments					
Communication/collaboration with City team					
Challenges facing growing communities					
Local government budget development					
Economic development and innovation in economic development					

Candidate Evaluation Form

City of Anytown - City Manager

Working with a diverse population and a commitment to diversity and inclusion					
Developing, mentoring and leading direct reports					
Working with partnerships – regional and public private					
Community outreach and community relations					
Working with the business community during the pandemic					
Experience in and commitment to excellence in customer service.					
Elected Officials – experience in developing positive relationships with all elected officials and in building consensus among elected officials					
Organizational Fit/Compatibility: Review the candidates’ potential to fit the city’s organizational culture.					
Overall Evaluation: Please add appropriate comments below:					

Comments (Please summarize your perceptions of the candidate’s strengths and any concerns that should be considered:

MGT



**Request for Proposal for Executive Search Firm for the Recruitment and
Selection of a Public Works Director**

Proposal Due Date: December 11, 2024

City of Fort Atkinson
101 N. Main St.
Fort Atkinson, WI 53538

Request for Proposal for Advertisement, Recruitment and Selection Services

Executive Search Firm

The City of Fort Atkinson, Wisconsin ("City") invites qualified executive search firms and consultants to submit a written proposal to conduct an executive recruitment campaign for the position of a Public Works Director. This is an excellent opportunity for an experienced, skilled administrator to apply to oversee the operations of the City of Fort Atkinson Public Works Department, including engineering, public works operations, utilities (wastewater, water, stormwater), electrical, and building inspection/zoning administration.

Proposals are being solicited for these services in accordance with the terms, conditions and instructions as set forth in the request for proposal. There is no expressed or implied obligation of the City to reimburse responding firms for any expenses incurred in preparing proposals in response to this request or for attending any meetings or conferences. The final award will be based on a best value concept. The City shall consider the entire proposal for, but not limited to, proposal completeness, ability to meet requested service needs, experience in conducting executive search and recruitment, expertise and availability of key personnel, cost to the City, and satisfaction of other clients. City staff will recommend the selection of an executive search firm to the Fort Atkinson City Council for final approval.

Background

The City's Public Works Department consists of multiple divisions: Public Works Operations, Engineering, Fort Atkinson Airport, Shared Ride Taxi Service, Building and Zoning Department, Electrical Department, Stormwater Utility, Water Utility, Wastewater Utility and City Planning/Development.

The City Engineer position is currently vacant and the City expects the new Public Works Director to be involved in the recruitment of the position. The Director of Public Works currently serves as the City Engineer. However, in 2024, the position was split into two: the Director of Public Works and the City Engineer. The City has been unable to fill the City Engineer position; therefore, the Director of Public Works continues to serve in both roles.

The Public Works Director sets strategic goals with these division managers and ensures coordination of work among the various divisions operating within the City right of way, and the City as a whole. The Director is an integral part of the management team and regularly interacts with residents, City Council members, and staff.

Scope of Services

The City is seeking proposals from qualified firms or consultants to assist in the recruitment and selection of its next full time Public Works Director in conjunction with the City Manager. It is anticipated that the selected firm or consultant shall perform the following work efforts during
CITY OF FORT ATKINSON, WISCONSIN
November 20, 2024

this hands on process:

1. Meet with the City Manager to ascertain the expected talent, abilities, education, and experience of the selected candidate.
2. Review and offer suggestions for updating the existing job description.
3. Review the goals and objectives of the City through the [City's Comprehensive Plan](#) and [Budget and Capital Improvements Plan](#) document.
4. Develop a plan to advertise, recruit and select an applicant who will meet the leadership expectations of the City.
5. Develop and distribute recruitment materials that will encourage qualified candidates to apply for the position.
6. Receive and review all resumes and applications from applicants.
7. Conduct a preliminary screening of applicants preparing a short list of 6-10 qualified and skilled candidates—submit that list to the City Manager with a written report of each candidate's background noting strengths and weaknesses. The City Manager may request the ability to review all applications.
8. Assist the City Manager with the selection of 4-5 semifinalists that will interview with the City Manager and a panel of City personnel.
 - a. Concurrently develop a series of evaluation tools or tests that will better allow additional insight into the talents and abilities of each candidate and recommend those evaluation tools to the City Manager.
9. Coordinate with the City Manager, and the applicants to set up an interview date and time. Set up evaluation tools and tests and coordinate schedules with all parties. Concurrently conduct appropriate background checks including but not limited to work related references and criminal background checks.
10. Assist and provide guidance in the final selection of the candidate and negotiate employment terms with the selected candidate.

Terms and Conditions

The City of Fort Atkinson City Council intends to recommend one firm to provide this service but reserves the right to reject any or all proposals without explanation. If the selected firm does not execute a written signed agreement with the City within 14 days of the award of contract, the City Council reserves the right to enter into an agreement with the next most-qualified firm. The City Council reserves the right to request clarification of information submitted and investigate the ability of the executive search firm to meet the required needs.

The City Council reserves the right to waive all requirements for this proposal and select the firm that is most advantageous for the City.

Requirement of the Proposal

1. Introduction - Provide the official name, address, phone number and email of the consulting firm, as well as the name of the principal contact person and the name of the person authorized to execute the contract.
2. Experience and Qualifications
 - a. A brief description of the organization
 - b. Name(s) and a brief description of the experiences and qualifications of the proposed staff member(s) who will be performing the services.
 - c. Names of entities, especially governmental, where these persons have performed similar executive searches, along with reference contact name and title, telephone number and email address at each entity a minimum of three recent references for comparable work.
 - d. Names of entities, other than above, where your firm has performed similar executive searches in the past two years, along with reference contact name and title, telephone number and email address at each entity.
3. Approach/Strategy Used to Perform the Project
 - a. Tentative schedule for each phase of the process including recruitment profile development, executive search, background screenings, identification of candidates, etc. In addition, detail current engagements and confirm ability to focus on the City's recruitment.
 - b. Approach to be used to address each search activity.
 - c. Methods used to communicate and to work with the City Manager.
 - d. Describe major challenges to a successful Public Works Director search and how the project team will address them.
4. Cost Proposal
 - a. The cost of the proposed services should be formatted in a "not to exceed" lump sum amount for completing the efforts, including meetings your firm anticipates needing with involved parties.
 - b. Also include hourly rates and anticipated time and materials needed, as well as an itemized breakdown of the cost associated with major or important components of the search, as determined by the consultant.
 - c. Clearly define, identify, and provide an estimate of additional services

and/or reimbursable expenses not included in the basic fee.

5. Additional Materials

- a. Alternate proposals identifying areas to reduce ultimate City cost are encouraged.
- b. Sample work products such as recruitment brochures, candidate questionnaire, candidate reference and background reports.
- c. Philosophy and policies regarding client satisfaction in the event of an unsuccessful search or premature (within 2 years of appointment) dismissal or resignation of identified candidates. State any guarantees offered.
- d. A sample of any standard contract form normally used by the consultant.

Review of Submittals

The City Council and the City Manager will review the proposals and may request interviews/presentations. The City Council and the City Manager reserve the right to recommend approval of a firm based on submittals without scheduling interviews. The City Council may take action on selecting a firm as soon as December 17th.

Submitting Proposals

Interested firms must submit a PDF file to rhouseman@fortatkinsonwi.gov by Wednesday, December 11, 2024, by 5:00 p.m. CDT. Submittals received after the deadline will not be considered. Please complete the attached form with your proposal to conduct this recruitment for the City. All communications regarding this RFP shall be directed to:

Rebecca Houseman
City Manager
101 N. Main St.
Fort Atkinson, WI 53538
Phone: 920.397.9901
Email: rhouseman@fortatkinsonwi.gov

City of Fort Atkinson
Proposal to Provide Recruitment Services For the
position of Public Works Director

I hereby certify that I am authorized to make this offer on behalf of the named company and to bind said company to this proposal. By submitting this proposal, I hereby represent that the firm identified below is fully qualified to perform the services described to achieve the organization's objectives in a professional manner.

Name of Firm _____

Address _____

City/State/Zip _____

Signature _____

Name (Print) _____

Title _____

Telephone Number _____

E-Mail Address _____

Date Submitted _____

PRICE PROPOSAL

Total Cost of Activities - All costs related to travel, supplies, etc., are to be included.

Total, not-to-exceed cost: \$ _____



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Andy Selle, Director of Public Works

RE: Review and possible action relating to the repair of the 2020 Dodge Grand Caravan for the Taxi Program at a cost of \$22,476.78 from Shepy's Autobody with a 10% contingency (Selle, Director of Public Works)

BACKGROUND

On September 11, 2024, the City's 2020 Dodge Grand Caravan taxi (1007) from the Shared Ride Taxi Program, operated by Brown Cab, was involved in a crash. No passengers were in the vehicle at the time of the incident and the driver was not injured. Airbags deployed, and the insurance company totaled the vehicle.

DISCUSSION

The insurance provider for Brown Cab, Cincinnati Insurance Company, indicated the cash value of the van is \$32,125. The adjuster stated the van is a total loss with the repairs coming in just under 70% of the vehicle's value with the possibility of more repairs being found.

The vehicle has damage to the left rear door, quarter panel, rocker panel, running board, and floor pan. There is also possible additional damage to the floor and inner structures.

FINANCIAL ANALYSIS

The City operates the Shared Ride Taxi Program with the help of federal grant funding from the Department of Transportation. The vehicles are purchased with a grant from the DOT and are split with the DOT paying 80% and the City paying 20%. The cost to replace a taxi in 2025 is \$74,574 with the City responsible for 20% of the cost and the vehicle not arriving until the middle of next year. There are no excess funds in the 2025 Taxi Fund to cover the City's portion a new taxi purchase. After the insurance settlement, the City would still be responsible for \$8,575 for a new taxi.

The cost to repair the 2020 van is quoted by the insurance company at \$21,132.22. The insurance company opted to total the van. Staff has determined the best course of action is to repair the van. The salvage price the insurance company will give the City is \$23,965.48.

The City released a request for proposals to auto body shops to repair the taxi. The City sent it

to Butch's Highlight Auto Body, Fueled Customs and Shepy's Auto Body. Butch's Highlight Autobody and Fueled Customs decided not to submit proposals. The City received a proposal from Shepy's Auto Body of \$22,476.78.

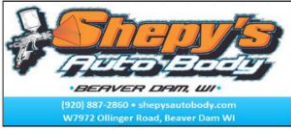
The \$22,476.78 can be recorded as a program expense, according to DOT staff. This expense will be offset by the \$23,965.48 from the insurance company. For 2024, taxi revenues appear to be on track to exceed the required portion of the contract and may be able to cover additional repair costs. Given the potential to find damage that could not be seen on the vehicle, staff request a 10% contingency with this contract to cover any such situations. The total potential cost of the repair will not exceed \$24,724.46 without additional City Council review.

RECOMMENDATION

Staff recommends the council approve the proposal from Shepy's Autobody to repair the 2020 Dodge Grant Caravan taxi at a cost of \$22,476.78 with a 10% contingency to be authorized by City staff.

ATTACHMENTS

1. Shepy's Proposal - 2020 Dodge Grand Caravan SE
2. Insurance Co Appraisal
3. Salvage Quote
4. 2020 Dodge Grand Caravan RFP reissue



SHEPY'S AUTO BODY
W7972 Ollinger Rd, Beaver Dam, WI 53916-9454
Office: (920) 887-2860
Mirandah@shepysautobody.net
www.shepysautobody.com

Estimate ID
20199158
Original

Owner
1007

Appraiser
Mirandah Welch
mirandah@shepysautobody.net

Classification
None

Loss Type
Unknown

Deductible
Unknown

2020 Dodge Grand Caravan SE Van 121" WB 3.6L 6 Cyl Gas Injected 2WD

VIN
2C4RDGBG9LR198134

Drivable
Unknown

Mitchell Service Code
911405

Options				
4 Doors	Air Conditioning	Alum/Alloy Wheels	Anti-Lock Brake Sys. (ABS)	Auxiliary Input
Bluetooth Wireless Connectivity	CD Player	Cruise Control	Daytime Running Lights	Driver-Front Air Bag
Dual A/C	Electric Defogger	Electronic Stability Control	First Row Bucket Seat	Hard Drive
Heated Mirror	Interior Automatic Day/Night Or Electrochromatic Mirror	Keyless Entry System	Left-Curtain Air Bag	MP3 Player
Passenger-Front Air Bag	Power Door Locks	Power Remote Mirror	Power Steering	Power Windows
Privacy Glass	Rear Gate Wiper	Rear Heating, Ventilation & Air Conditioning	Rear Spoiler	Rearview Camera
Satellite Radio	Second Row Bucket Seat	Second Row Side Airbag With Head Protection	Side Airbags	Steering Wheel Mounted Audio Control
Theft Deterrent Sys.	Third Door	Third Row Seat	Tilt Steering Wheel	Tire Pressure Monitoring System
Traction Control/Electronic	Trip Computer			

1007 | 2020 Dodge Grand Caravan SE

Parts Profile
aftermarket

Parts Profile Version
4.0

		LABOR				PART					
Line #		Description	Operation	Type	Total Units	CEG	Type	Number	Qty	Total Price	Tax
Air Bag System											
1	102144	L Air Bag Side Curtain Module -M	Remove / Replace	Mechanical	INC#	0.8	New	68351559AD	1	\$220.00*	Yes
2	103053	Air Bag Module-Passenger Seat -M	Remove / Replace	Mechanical	0.9#	0.9	New	68359022AB	1	\$891.00	Yes
3	AUTO	R Frt Seat Assy	Remove / Install	Body	0.3	0.3					
4	102285	L Ctr Air Bag Side Impact Sensor -M	Remove / Replace	Mechanical	0.3#	0.3	New	68137947AA	1	\$66.85	Yes

Committed On

Version
Mitchell Estimating 24.4
OEM SEP_24_V

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Printed On
12/11/2024
04:44 PM

Profile
System profile
Profile Version
10.0

Page 1 of 4

		LABOR				PART				
Line #	Description	Operation	Type	Total Units	CEG	Type	Number	Qty	Total Price	Tax
5	102280 R Rear Air Bag Side Impact Sensor -M	Remove / Replace	Mechanical	0.3#	0.3	New	68137949AA	1	\$254.00	Yes
6	102281 L Rear Air Bag Side Impact Sensor -M	Remove / Replace	Mechanical	INC#	0.3	New	68137949AA	1	\$254.00	Yes
Windshield										
7	102987 L W/Shield Pillar Garnish	Remove / Replace	Body	0.2	0.2	New	[6LV33DX9A D]	1	\$99.15	Yes
Rocker / Pillars										
8	100070 L Upr Ctr Pillar Moulding	Remove / Replace	Body	INC	0.4	New	[ZR27DX9AF]	1	\$45.40	Yes
Front Seat										
9	101781 Pass Side Seat Back Cover	Remove / Replace	Body	0.9#	0.9	New	[5SU94DX9AB]	1	d\$893.00	Yes
10	101769 Pass Side Seat Back Pad	Remove / Replace	Body	INC#	0.9	New	[68102102AA]	1	d\$198.00	Yes
11	101770 Pass Side Seat Back Pad	Remove / Replace	Body	INC#	0.9	New	[68101624AA]	1	\$670.00	Yes
12	101777 Pass Side Seat Back Frame	Remove / Replace	Body	INC#	0.9	New	[4610153AD]	1	\$722.00	Yes
Seat Belts										
13	101665 R Frt Seat Belt	Remove / Replace	Body	1.0#	1.0	New	[ZV681X9AJ]	1	\$419.00	Yes
14	101663 L Frt Seat Belt	Remove / Replace	Body	1.0#	1.0	New	[ZV691X9AJ]	1	\$280.00	Yes
15	101674 R Frt Seat Belt Buckle	Remove / Replace	Body	0.2	0.2	New	[ZV861X9AI]	1	\$384.00	Yes
16	101664 L Frt Seat Belt Buckle	Remove / Replace	Body	0.2	0.2	New	[ZV871X9AG]	1	\$356.00	Yes
17	101362 L Ctr Seat Belt	Remove / Replace	Body	0.3	0.3	New	[ZV711X9AD]	1	\$346.00	Yes
18	101332 L Ctr Seat Belt Buckle	Remove / Replace	Body	0.2#	0.2	New	[ZV881D1AA]	1	\$96.65	Yes
19	AUTO L Ctr Seat Assy	Remove / Install	Body	0.3	0.3					
20	101372 L Rear Otr Seat Belt & Retractor	Remove / Replace	Body	0.3	0.3	New	[ZV73DX9AD]	1	\$226.00	Yes
21	101340 L Rear Seat Belt Buckle	Remove / Replace	Body	0.2#	0.2	New	[ZV911X9AA]	1	\$121.00	Yes
22	AUTO Rear Seat Assy	Remove / Install	Body	0.3	0.3					
Front Door										
23	101388 L Frt Door Shell	Repair	Body	3.0*#	5.4	Existing				
24	AUTO L Frt Door Outside	Refinish Only	Refinish	2.3 C	2.3	Existing				
25	101926 L Frt Rear View Mirror	Remove / Install	Body	0.3#	0.4	Existing				
26	101924 L Frt Otr Door Belt Moulding	Remove / Install	Body	0.2#	0.2	Existing				
27	102690 L Frt Door Rear Applique	Remove / Install	Body	0.2	0.2	Existing				
28	100777 L Frt Otr Door Handle	Remove / Install	Body	0.8#	0.8	Existing				
Side Door										
29	100191 L Side Door Shell	Remove / Replace	Body	6.4#	6.4	New	5020699AQ	1	\$1,845.00*	Yes

Line #	Description	LABOR				PART				
		Operation	Type	Total Units	CEG	Type	Number	Qty	Total Price	Tax
30	AUTO L Side Door Outside	Refinish Only	Refinish	2.2 C	2.6					
31	AUTO L Add For Jambs & Interior	Refinish Only	Refinish	1.0 C	1.0					
32	100927 L Rear Side Door Striker	Remove / Replace	Body	INC	0.2	New	4717598AH	1	\$27.95	Yes
Van Side Panel										
33	101039 L Van Side Panel	Remove / Replace	Body	17.5#	19.0	New	4894757AI	1	\$1,075.00*	Yes
34	AUTO L Van Side Panel Outside	Refinish Only	Refinish	2.2 C	2.6					
35	AUTO L Add For Pillar	Refinish Only	Refinish	0.5 C	0.5					
36	AUTO L Van Side Panel Edge	Refinish Only	Refinish	0.5 C	0.5					
37	AUTO L Add To R&I/R&R Side Curtain Air Bags-M	Remove / Replace	Mechanical	0.8	0.8					
38	AUTO L Rear Add To R&I/R&R Side Air Bag Senso	Remove / Replace	Mechanical	0.3	0.3					
39	101072 L Van Side Sill	Remove / Replace	Body	6.6#	6.6	New	4894755AB	1	\$240.00	Yes
40	101061 L Side Door Track Assy	Remove / Replace	Body	1.5	1.5	New	68067847AF	1	\$125.00*	Yes
41	101111 L Lwr Van Side Moulding	Remove / Replace	Body	INC	0.5	New	68069669AB	1	\$620.00	Yes
42	AUTO L Lwr Quarter Moulding	Refinish Only	Refinish	1.0 C	1.0					
43	101125 L Frt Van Side Pillar Trim Panel	Remove / Replace	Body	INC	0.2	New	[ZR09DX9AI]	1	\$44.40	Yes
44	101131 L Rear Van Side Corner Trim Panel	Remove / Replace	Body	INC	0.3	New	[ZR13BD1AI]	1	\$275.00	Yes
Roof										
45	101257 Roof Headliner	Remove / Replace	Body	2.8	2.8	New	[6QW151DAA C]	1	\$3,375.00*	Yes
Additional Costs & Materials										
46	AUTO Paint/Materials	Additional Cost							\$580.80	Yes
47	AUTO Shop Materials	Additional Cost							\$1,944.80*	Yes
Additional Operations										
48	AUTO Clear Coat	Additional Operation	Refinish	2.4	0.0				\$0.00	
Special / Manual Entry										
49	900500 Left running board	Remove / Replace	Body*	1.2*	0.0	New		1	\$225.00*	Yes

* Judgment Item

T Included in Two Tone Calculation

Labor Note Applies

d Discontinued by Manufacturer

C Included in Clear Coat Calculation

A Included in Clear Coat and Two Tone Calculation

r CEG R&R Time Used for this Labor Operation

[] Verify the part number and price before ordering

Estimate Totals

Labor	Units	Rate	Sublet	Add'l Amount	Totals
Body Labor	45.9	\$70.00			\$3,213.00
Refinish Labor	12.1	\$70.00			\$847.00
Mechanical Labor	2.6	\$125.00			\$325.00

Total Labor	60.6		
		Taxable	\$4,385.00
		Tax 5.5000%	\$241.18
		Non-Taxable	\$0.00
		Pre-Tax Discount 0.00%	\$0.00
		Labor Total	\$4,626.18
Parts	Amount		
Taxable Parts	\$14,394.40		\$14,394.40
		Parts Adjustments	\$0.00
		Tax 5.5000%	\$791.69
		Non-Taxable	\$0.00
		Pre-Tax Discount 0.00%	\$0.00
		Parts Total	\$15,186.09
Costs	Amount		
Paint Materials	\$580.80		\$580.80
Shop Materials	\$1,944.80		\$1,944.80
Other Additional Costs	\$0.00		\$0.00
Paint Materials:		Taxable	\$2,525.60
- Refinish Units: 12.1 units		Tax 5.5000%	\$138.91
- Rate: \$48.00		Non-Taxable	\$0.00
- Rate Max: 99.9 units		Pre-Tax Discount 0.00%	\$0.00
- Additional Rate: \$0.00		Costs Total	\$2,664.51
Shop Materials:			
- Rate: \$68.00			
Gross Totals	Amount		
Gross Total	\$22,476.78		\$22,476.78
		Taxable	\$21,305.00
		Tax	\$1,171.78
		Non-Taxable	\$0.00
		Pre-Tax Discount 0.00%	\$0.00
		Gross Total	\$22,476.78
Adjustments	Amount		
Total Customer Responsibility			\$0.00
		Net Estimate Total	\$22,476.78

Job Created	9/24/2024 09:10 AM
Estimate Started	9/24/2024 10:49 AM
Estimate Printed	12/11/2024 04:44 PM
Estimate Committed	Estimate Not Committed
Estimate Retrieval ID	1003036017



MWA Appraisal Group

PO Box 8320, Rockford, IL 61126

608-289-4526

info@mwaag.com

2020 Dodge Grand Caravan BraunAbility Van ACV Report

	Market Survey #1	Market Survey #2
	Car Fax 888-955-3351	Renew 800-956-6668
Retail Value	\$26,991	\$37,995
Mileage Adjustment	\$1,609	-\$2,344
Unrelated Prior Damage		
Adjusted Retail Value	\$28,600	\$35,651

The actual cash value is based off the average of the above adjusted market surveys and NADA

Actual Cash Value: \$32,125



Assignment Info

File # : 3410532
Claim # : 4369663
Date : 09/23/2024

MWA Appraisal Group Inc.

PO Box 8320
Rockford, IL 61126
Phone (608) 289-4526
Fax (608) 531-4171
Email mwashington@mwaag.com



File Name / Description:
FRONT



File Name / Description:
LEFT_FRONT



Assignment Info

File # : 3410532
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File Name / Description:
LEFT_SIDE



File Name / Description:
LEFT_REAR



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File Name / Description:
REAR



File Name / Description:
RIGHT_REAR



Assignment Info

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File Name / Description:
RIGHT_SIDE



File Name / Description:
RIGHT_FRONT



Assignment Info

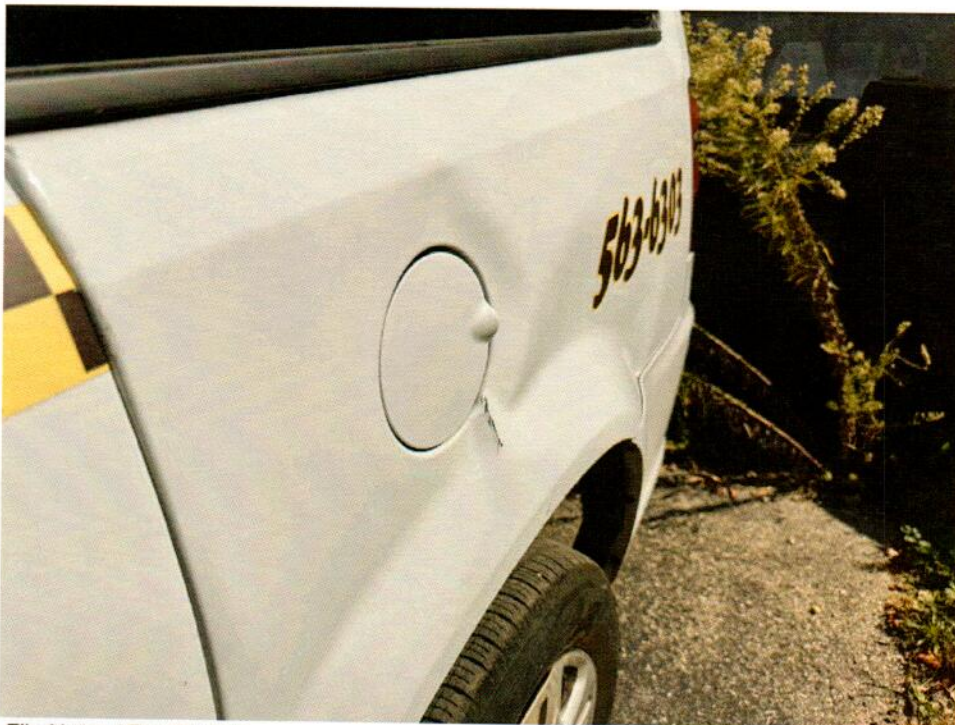
File # : 3410532
Claim # : 4369663
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File Name / Description:
LT_QTR_DAMAGE



File Name / Description:
LT_QTR_DAMAGE_1

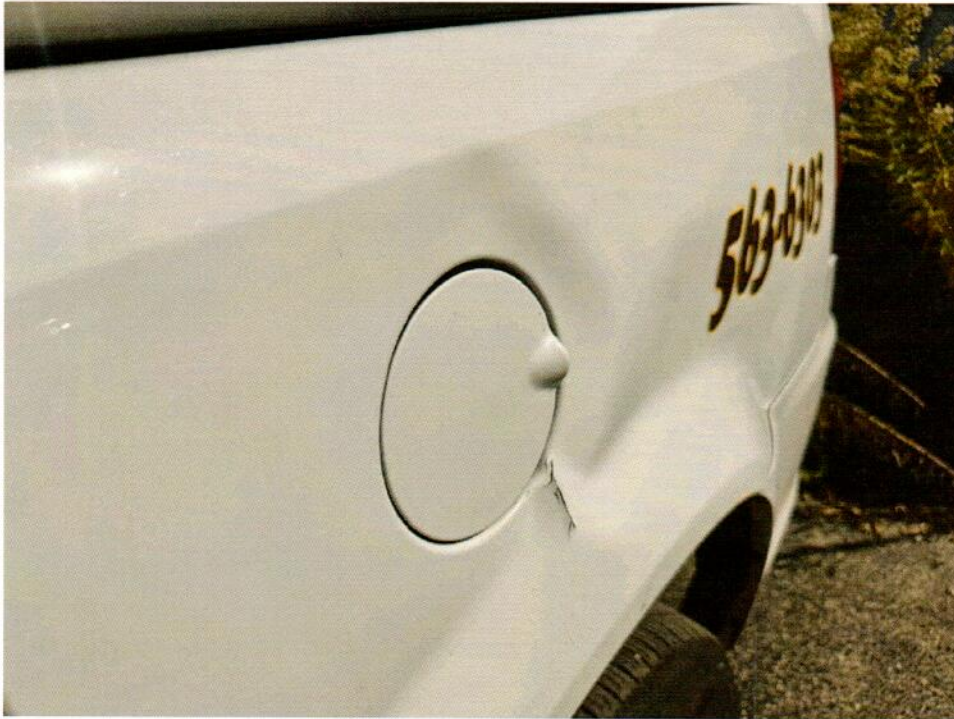


Assignment Info

File # : 3410532
Claim # : 4369663
Date : 09/23/2024

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File Name / Description:
LT_QTR_DAMAGE_1_1_1



File Name / Description:
LT_QTR_DAMAGE_1_1_1



Assignment Info

File # : 3410532

Claim # : 4369663

Date : 09/23/2024

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File Name / Description:
LT_R_DOOR_DAMAGE



File Name / Description:
LT_ROCKER_MLDG



Assignment Info

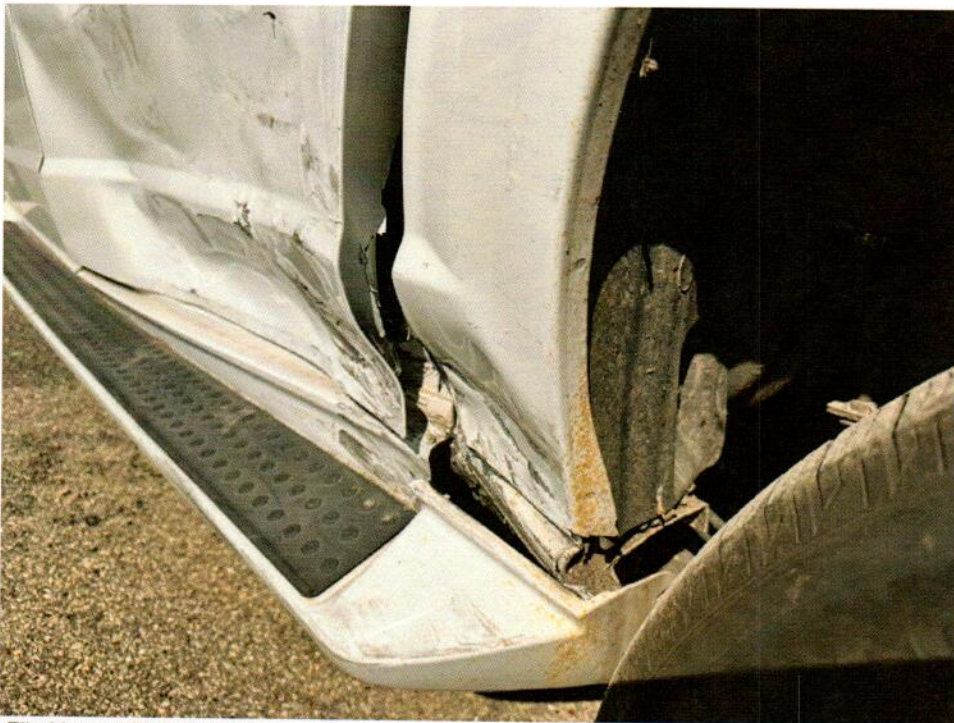
File # : 3410532
Claim # : 4369663
Date : 09/23/2024

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Rockford, IL 61126
Phone (608) 289-4526
Fax (608) 531-4171
Email mwashington@mwaag.com



File Name / Description:
LT_ROCKER_MLDG_1



File Name / Description:
LT_QTR_DAMAGE_1_1_1_1



Assignment Info

File # : 3410532

Claim # : 4369663

Date : 09/23/2024

MWA Appraisal Group Inc.

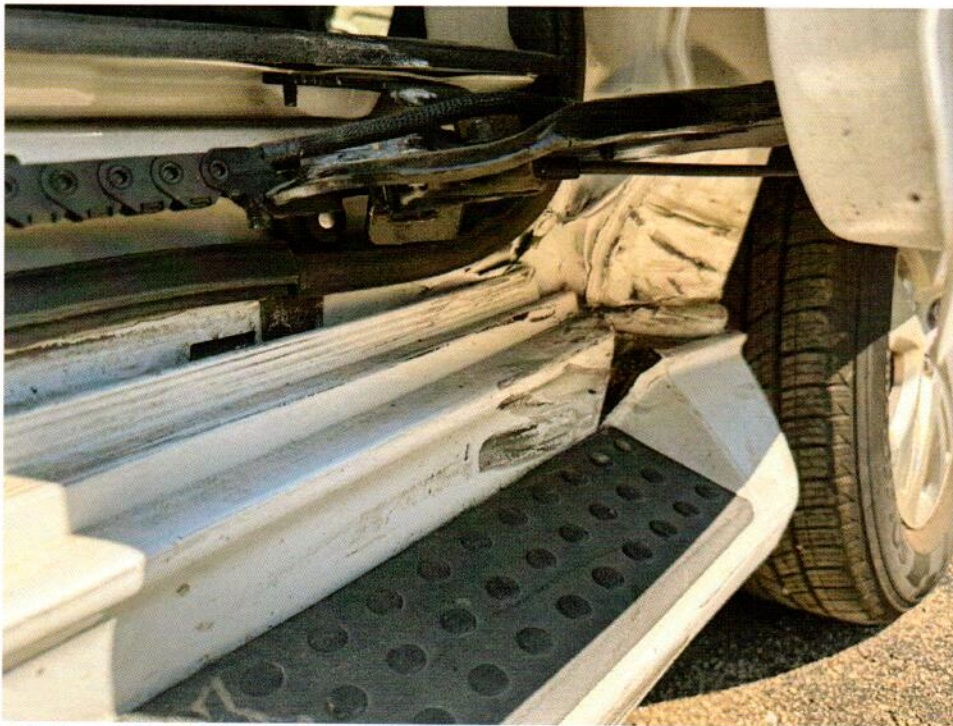
PO Box 8320

Rockford, IL 61126

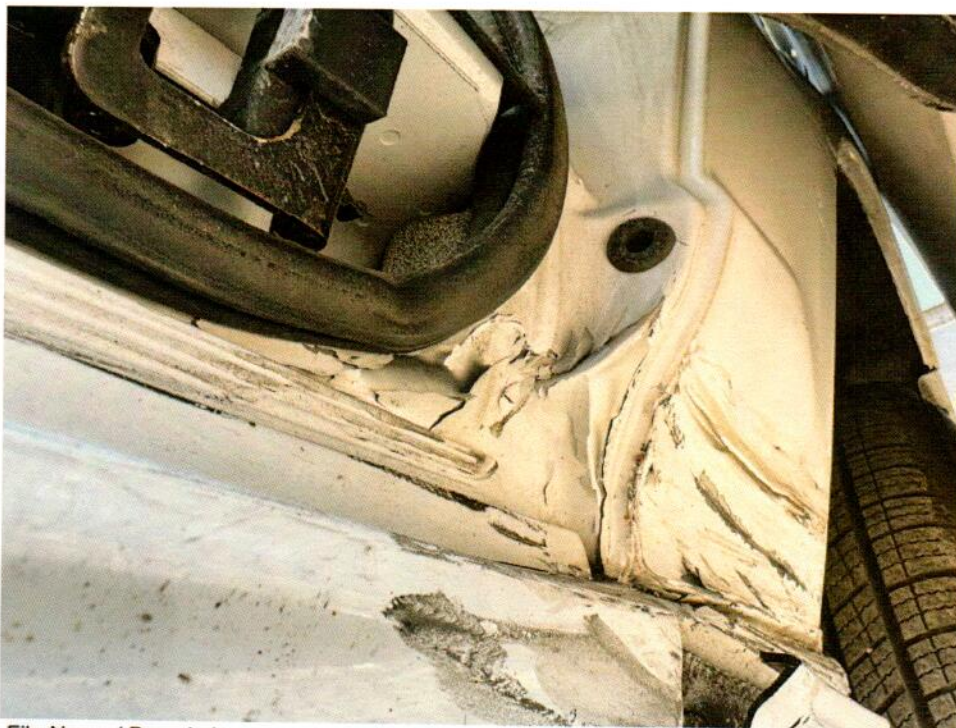
Phone (608) 289-4526

Fax (608) 531-4171

Email mwashington@mwaag.com



File Name / Description:
LT_ROCKER_PANEL



File Name / Description:
LT_DOG_LEG_DAMAGE



Assignment Info

File # : 3410532

Claim # : 4369663

Date : 09/23/2024

MWA Appraisal Group Inc.

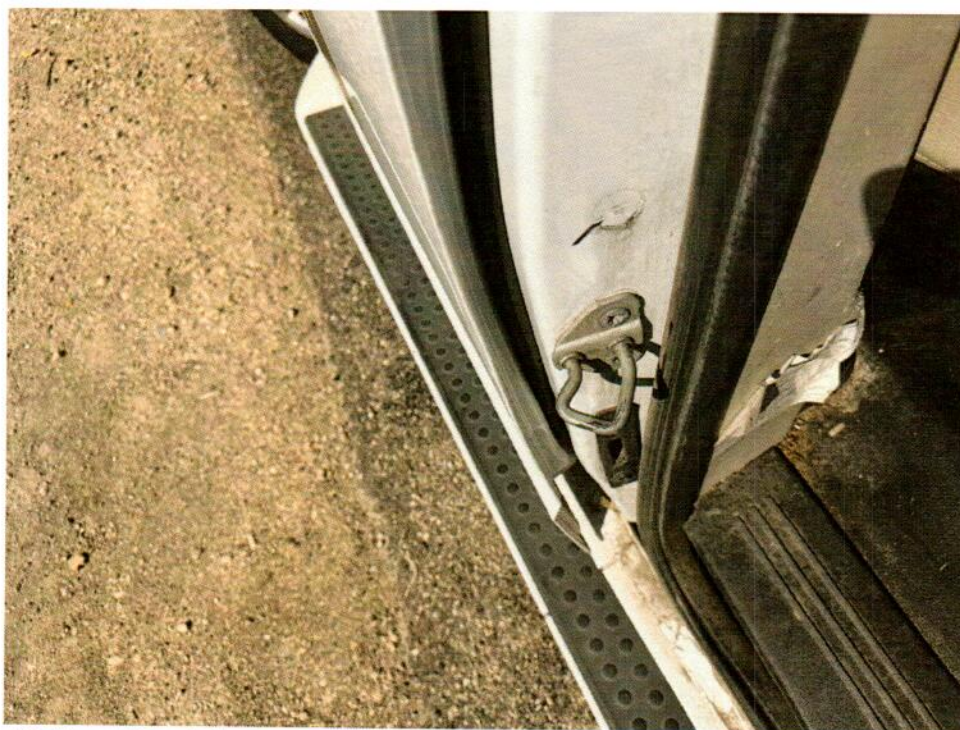
PO Box 8320

Rockford, IL 61126

Phone (608) 289-4526

Fax (608) 531-4171

Email mwashington@mwaag.com



File Name / Description:

LATCH



File Name / Description:

DOOR_TRIM



Assignment Info

File # : 3410532

Claim # : 4369663

Date : 09/23/2024

MWA Appraisal Group Inc.

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Rockford, IL 61126

Phone (608) 289-4526

Fax (608) 531-4171

Email mwashington@mwaag.com



File Name / Description:

LT_FRNT_INTERIOR



File Name / Description:

STEERING_WHEEL



Assignment Info

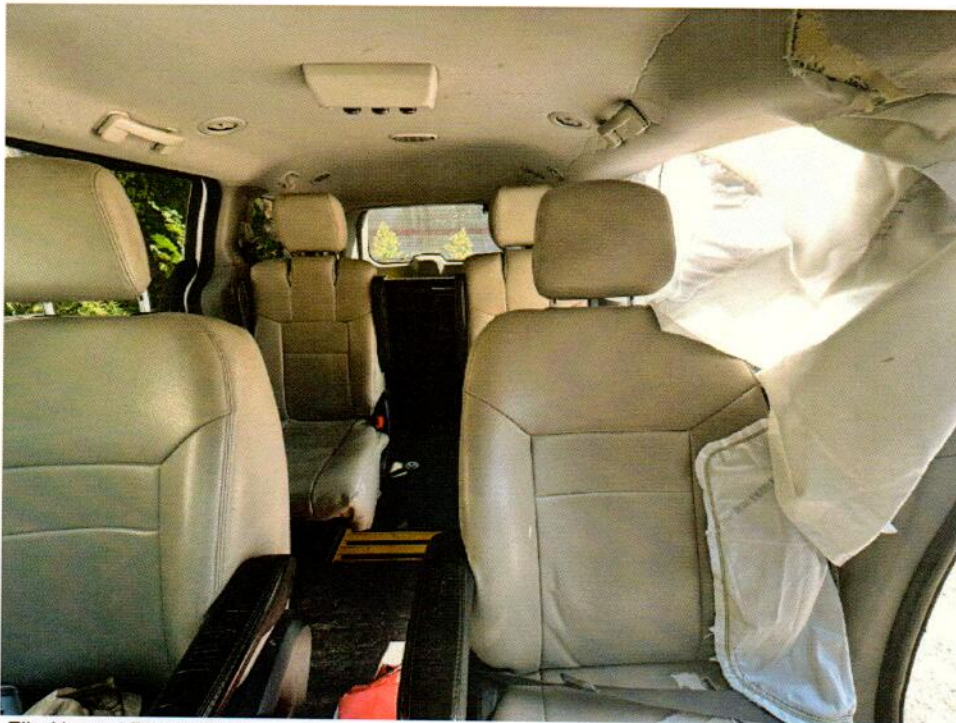
File # : 3410532
Claim # : 4369663
Date : 09/23/2024

MWA Appraisal Group Inc.

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Rockford, IL 61126
Phone (608) 289-4526
Fax (608) 531-4171
Email mwashington@mwaag.com



File Name / Description:
DASH



File Name / Description:
INTERIOR



Assignment Info

File # : 3410532
Claim # : 4369663
Date : 09/23/2024

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File Name / Description:
LT_CURRTAIN_AIRBAG



File Name / Description:
LT_CURRTAIN_AIRBAG _1



Assignment Info

File # : 3410532
Claim # : 4369663
Date : 09/23/2024

MWA Appraisal Group Inc.

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Phone (608) 289-4526
Fax (608) 531-4171
Email mwashington@mwaag.com



File Name / Description:
WHEELCHAIR_LIFT



File Name / Description:
MIL



Assignment Info

File # : 3410532
Claim # : 4369663
Date : 09/23/2024

MWA Appraisal Group Inc.

PO Box 8320
Rockford, IL 61126
Phone (608) 289-4526
Fax (608) 531-4171
Email mwashington@mwaag.com



File Name / Description:
VIN_1



MWA Appraisal Group Inc.

PO Box 8320

Rockford, IL 61126

Phone (608) 289-4526

Fax (608) 531-4171

Email mwashington@mwaag.com

APPRAISAL REPORT - FILE # 3410532

COMPANY		VEHICLE OWNER	
Company	Cincinnati Insurance Company- Mad...	Name	Running Inc
Adjuster	Zach Gesteland	Address	735 Madison Ave
Claim Number	4369663	City	Fort Atkinson
Policy Number		State	WI
Deductible	0	Zip	53538
Insured Name	Running Inc	Mobile Phone	(608) 637-2599
Date of Loss	September 11, 2024	Home Phone	
Date Contacted		Work Number	
Date Inspected	September 17, 2024	Email	DIANE@RUNNINGINC.NET
Loss Type			
Claim For	Insured		
Assignment Type	Total_loss		
Appraiser	Jake Washington		
VEHICLE INFO		VEHICLE LOCATION	
Year	2020	Location	With Owner
Make	Dodge	Location Name	RUNNING INC'S FORT ATKINSON SHOP LOCATION
Model	Caravan	Address	735 Madison Ave
VIN	2C4RDGBG9LR198134	City	Fort Atkinson
License Plate		State	WI
Color	BRIGHT WHITE	Zip	53538
Mileage	126085	Phone	(920) 723-1945
Driveable	No	Fax	
TIRE INFORMATION			
	Tire Make	Size	Tread Depth
Left Front			
Right Front			
Left Rear			
Right Rear			
TOWING & SALVAGE		TOTAL LOSS	
Towing Charges	\$ 0.00	Total Loss	Yes
Lien Fee	\$ 0.00	Driveable	No
Admin Fee	\$ 0.00	Total Loss Valuation	Other
Other Charges	\$ 0.00	Request #	
Storage Fee (per day)	\$ 0.00	Valuation Amount / TL %	\$32125.00 / 65.78%
Storage Since		NADA Value / TL %	\$0.00 /
ESTIMATE		SALVAGE BIDS	
Appraisal Amount	\$ 21132.22	Salvage Yard / Contact	Phone Amount
UPD Amount	\$ 0.00	/	0.00
Betterment Amount	\$ 0.00	/	0.00
Deductible	\$ 0	/	0.00
Net Total	\$ 21,132.22		
Agreed Price			

Agreed By		REPAIR SHOP INFO	
Days to Repair	17	Location Name	Shepy's Auto Body
Estimate Released	No	Address	W 7972 Ollinger Rd
Supplement #1	0.00	City State Zip	Beaver Dam WI 53916
Supplement #2	0.00	Phone	(920) 887-2860
Supplement #3	0.00	Fax	
Supplement #4	0.00	Email	
Supplement #5	0.00	TIN	

Appraiser Comments
Unit is a total loss. Repairs are just under 70%, but additional would be found once torn down. Possible additional damage to the floor and inner structures. Vehicle has damage to the left rear door, quarter panel, rocker panel, running board, and floor pan. We tried to get in contact with the shop however they did not return our calls. Please see the attached comparables, and ACV work up. We feel the ACV is \$32,125 which includes the wheel chair Braunability up fit. No copies have been dispersed at this time. Thank you for this assignment.

MEMBER I.A.D.A.
MWA Appraisal Group
PO Box 8320
Rockford, IL 61126
Phone: 608-289-4526

*** ESTIMATE ***

09/20/2024 10:28 AM

Owner

Owner: Running Inc
Contact: Running Inc.
Address: 735 Madison Ave
City State Zip: Fort Atkinson, WI 53538
Email: DIANE@RUNNINGINC.NET

Cell: (608)637-2599
FAX:

Control Information

Claim #: 4369663
Loss Date/Time: 09/11/2024
Deductible: None
File #: 3410532

Insured Policy # :
Loss Type: Collision

Accounting # :

Ins. Company: Cincinnati Ins.
Company Contact: Zach Gesteland
Address:
Address: 735 Madison Ave
City State Zip: Fort Atkinson, WI 53538
Email: DIANE@RUNNINGINC.NET

Work/Day: (608)419-5368
Work/Day: (608)637-2599
FAX:

Claim Rep: GESTELAND ZACH

Inspection

Inspection Date: 09/17/2024
Inspection Location: With Owner
City State Zip: Fort Atkinson, WI 53538
Primary Impact: Left Rear Side
Driveable: Yes

Inspection Type: Independent Field
Contact:
FAX:
Secondary Impact:
Rental Assisted:

Assigned Date/Time:

Received Date/Time: 09/20/2024 10:23 AM

Appraiser Name: Jake A Washington
Address: P.O. Box 8320
City State Zip: Rockford, IL 61126
Email: Jwashington@mwaag.com

Appraiser License #2 :
Work/Day: (608)631-4484
FAX:

Repairer

Repairer: Shepy's Auto Body
Address: W 7972 Ollinger Rd
City State Zip: Beaver Dam, WI 53916

Contact:
Work/Day: (920)887-2860
FAX:

Target Complete Date/Time:

Days To Repair: 17

Vehicle

2020 Dodge Caravan Grand SE 4 DR Passenger Van
6cyl Gasoline 3.6
6-Speed Automatic

Lic Expire:
Prod Date:
Veh Insp# :
Condition:
Ext. Color: BRIGHT WHITE
Ext. Refinish: Two-Stage
Ext. Paint Code: GW7,PW7,W7,AXR

VIN: 2C4RDGBG9LR198134
Mileage: 126,085
Mileage Type: Actual
Code: N6664B
Int. Color: Black/Light Graystone
Int. Refinish:
Int. Trim Code: H7X1

Options - AudaVIN Information Received

1st Row LCD Monitor(s)	2nd Row Head Airbags	3rd Row Head Airbags
60/40 Bench Seat	AM/FM CD Player	Analog Gauges
Anti-Lock Brakes	Armrest(s)	Automatic Dimming Mirror
Auxiliary Audio Input	Bodyside Moldings	Camper/Towing Package
Cargo Lamp	Cargo/Trunk Mat	Carpeting
Chrome Grille	Color-Keyed Bumper(s)	Courtesy/Warning Lights
Cruise Control	Daytime Running Lights	Driver Information Sys
Driver Knee Airbag	Dual Air Conditioning	Dual Airbags
Elect. Stability Control	Engine Block Heater	Floor Mats
Halogen Headlights	Head Airbags	Heated Power Mirrors
Heated Wiper Park	Interior Lighting	Intermittent Wipers
Keyless Entry System	LED Brakelights	Lighted Entry System
MP3 Decoder	Overhead Console	Paddle Shifter
Power Door Locks	Power Windows	Pwr Accessory Outlet(s)
Rain-Sensing W/S Wipers	Rear Lip Spoiler	Rear Side Airbags
Rear Step Bumper	Rear View Camera	Rear Window Defroster
Rear Window Wiper/Washer	Running Boards	Second Row Bench Seat
Side Airbags	Single Exhaust System	Steel Wheels
Strg Wheel Radio Control	Sunvisor	Tachometer
Temperature Gauge(s)	Third Seat (trucks)	Tilt & Telescopic Steer
Tire Pressure Monitor	Touch Screen Display	Traction Control System
Trip Computer	Velour/Cloth Seats	

AudaVIN options are listed in bold-italic fonts

Damages

Line	Op	Guide	MC	Description	MFR.Part No.	Price	ADJ%	B%	Hours	R
<u>Stripes And Mouldings</u>										
1	E	400		Mldg,Rocker Panel LT	68069669AB	\$620.00			INC	SM
2	L	400		Mldg,Rocker Panel LT	Refinish				1.0	RF
					1.0 Surface					
					INC Two-stage					
<u>Radiator Support</u>										
3	E	6		Airbag Sensor,Front LT	68137949AA	\$254.00			0.4	ME
4	E	7		Airbag Sensor,Front RT	68137949AA	\$254.00			0.2	ME
<u>Front Body And Windshield</u>										
5	BR	103		Fender,Front LT	Blend Refinish				1.2	RF
					0.8 Blend					
					0.4 Two-stage					
<u>Roof</u>										
6	E	855		Airbag,Roof LT	68351559AD	\$568.00			INC	ME
7	E	827	#	Headliner,Roof	1JE87HDAAC	\$3,375.00			2.9	SM

= 01, 02

Center Console And Seat Tracks

8	E	532	01	Module,Airbag Control	68233536AC	\$275.00	0.4	ME
9	E	917		Airbag,Front Seat LT	68359022AB	\$891.00	INC	ME
10	E	666	01	Seatbelt,Front LT	ZV69BD1AJ	\$278.00	0.3	SM
11	E	667	01	Seatbelt,Front RT	ZV68BD1AJ	\$466.00	1.0	SM
12	E	668	01	Pretensioner,Frt Seatb LT	ZV871X9AG	\$356.00	INC	SM
13	E	669	01	Pretensioner,Frt Seatb RT	ZV861X9AI	\$384.00	0.2	SM
14	E	688		Seatbelt,Rear	ZV841D1AB	\$308.00	0.3	SM
15	E	722	01	Seatbelt,Rear LT	ZV731D1AD	\$315.00	INC	SM
16	E	723	01	Seatbelt,Rear RT	ZV721D1AD	\$338.00	0.5	SM
17	E	724	01	Buckle,RR Seatbelt LT	ZV911D1AA	\$116.00	0.1	SM
18	E	725	01	Buckle,RR Seatbelt RT	ZV901D1AA	\$106.00	0.2	SM
19	E	447	01	Cushion,Front Seat LT	68101241AA	\$96.75	1.8	SM

Front Doors

20	BR	207		Door Shell,Front LT	Blend Refinish 0.8 Blend 0.4 Two-stage		1.2	RF
21	RI	252		Pnl,Inner Door Trim LT	R & I Assembly		INC	SM
22	RI	244		Mldg,Front Door Belt L/F	R & I Assembly		0.2	SM
23	RI	217		Mirror,Outer R/C LT	R & I Assembly		0.4	SM
24	RI	211		Handle,Front Door Otr LT	R & I Assembly		0.6	SM

Rear Doors

25	EC	287	46	Door Shell,Sliding LT	Replace Economy	\$1,845.00*	5.4	SM
26	L	287		Door Shell,Sliding LT	Refinish 2.0 Surface 1.0 Edge 0.4 Two-stage		3.4	RF
27	E	1145		Striker,Rear Lock LT	4717598AH	\$27.95	INC	SM

Quarter And Rocker Panel

28	L	181		Panel,Bodyside Front LT	Refinish 2.5 Surface 0.5 Two-stage		3.0	RF
29	E	68	07	Panel,Rocker Rear LT	4894755AB	\$240.00	6.1	SM
30	L	68	13	Panel,Rocker Rear LT	Refinish 1.9 Surface 0.5 Edge 0.6 Two-stage setup 0.4 Two-stage		3.4	RF
31	TE	264	#	Board,Running # = 01, 02	Partial Replace Price	\$627.00		SM
32	ET	265		Board,Running LT	Partial Replace Labor		INC	SM
33	L	265		Board,Running LT	Refinish 1.0 Surface 0.2 Two-stage		1.2	RF
34	E	389		Panel,Bodyside Outer LT	4894757AI	\$1,075.00	25.5	SM
35	L	389		Panel,Bodyside Outer LT	Refinish 2.7 Surface 1.5 Edge 0.1 Two-stage		4.3	RF
36	BR	394		Door,Fuel Filler LT	Blend Refinish 0.2 Blend INC Two-stage		0.2	RF
37	RI	608		Glass,Quarter Shaded LT	R & I Assembly		INC	SM

Inner Quarter & Panels

38	E	707	01	Airbag Sensor,Side LT	68137947AA	\$66.85	INC	ME
39	I	1411	07	Pnl,Wheelhouse Inner LT	Repair		4.0*	SM
40	L	1411		Pnl,Wheelhouse Inner LT	Refinish		0.5	RF

41	RI	465	Shld,Bdysd Pnl Splash LT	0.5 Surface R & I Assembly	INC	SM
Rear Bumper						
42	RI	501	RR Bumper Cvr Overhaul	R & I Assembly	0.4	SM
Rear Body, Lamps And Floor Pan						
43	I	591	Pan,Rear Floor	Repair	4.0*	SM
44	L	591	Pan,Rear Floor	Refinish	1.5	RF
45	RI	533	Taillamp Assembly LT	1.5 Surface R & I Assembly	INC	SM
Manual Entries						
46	EC	M14	Corrosion Protection	Replace Economy	\$10.00*	0.2* SM
47	EC	M17	Cover Car Exterior	Replace Economy	\$5.00*	RF
48	SB	M60	Hazardous Waste Removal	Sublet Repair	\$3.00*	SM
49	I		Pre Scan	Repair		0.5* ME
50	I		Post Scan	Repair		0.5* ME
51	SB		Wheel Alignment	Sublet Repair	\$99.99*	SM
52	I		Set Up & Rough Pull	Repair		5.0* SM
53	E		DECALS	Replace OEM	\$120.00*	SM*
54	E		LT FRNT DOOR NAMEPLATE	Replace OEM	\$75.00*	SM*
54 Items						

MC Message

01 CALL DEALER FOR EXACT PART # / PRICE
02 PART NO. DISCONTINUED, CALL DEALER FOR EXACT PART NO.
07 STRUCTURAL PART AS IDENTIFIED BY I-CAR
13 INCLUDES 0.6 HOURS FIRST PANEL TWO-STAGE ALLOWANCE
46 PRINTABLE ALTERNATE PARTS COMPARE

Estimate Total & Entries

OEM Parts				\$11,232.55	
Other Parts				\$1,860.00	
Paint & Materials	20.9 Hours @	\$50.00		\$1,045.00	
Parts & Material Total					\$14,137.55
Tax on Parts & Material	@	5.500%			\$777.57
Labor					
	Rate	Replace Hrs	Repair Hrs	Total Hrs	
Sheet Metal (SM)	\$70.00	46.1	13.0	59.1	\$4,137.00
Mech/Elec (ME)	\$95.00	1.0	1.0	2.0	\$190.00
Frame (FR)	\$95.00				
Refinish (RF)	\$70.00	20.9		20.9	\$1,463.00
Labor Total				82.0 Hours	\$5,790.00
Tax on Labor	@	5.500%			\$318.45
Sublet Repairs					\$102.99
Tax on Sublet	@	5.500%			\$5.66
Gross Total					\$21,132.22
Less: Deductible					None-
Net Total					\$21,132.22

Alternate Parts Y/02/00/00/02/02 Cumulative 02/00/00/02/02 Zip Code: 61126 Geo 61126
SPPL Yes Zip Code: 50313 Default
Rate Name Shepy's Auto Body

Audatex Estimating 10.29.114 ES 09/20/2024 02:59 PM REL 10.29.114 DT 09/01/2024 DB 09/15/2024
State Disclosure:WI
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A 50% Blend Refinish calculation of basecoat refinish labor was used for applicable panels on this estimate.
3.0 HRS WERE ADDED TO THIS ESTIMATE BASED ON AUDATEX'S TWO-STAGE REFINISH FORMULA.
ESTIMATE CALCULATED USING THE 2.5 HOUR MAXIMUM ALLOWANCE FOR TWO-STAGE REFINISH OF NON-FLEX, EXTERIOR SURFACES.

THIS IS NOT AN AUTHORIZATION TO REPAIR. AUTHORIZATION COMES FROM OWNER.
NO SUPPLEMENTS WITHOUT PRIOR APPROVAL.

THIS ESTIMATE HAS BEEN PREPARED BASED ON THE USE OF ONE OR MORE REPLACEMENT PARTS SUPPLIED BY A SOURCE OTHER THAN THE MANUFACTURER OF YOUR MOTOR VEHICLE. WARRANTIES APPLICABLE TO THESE REPLACEMENT PARTS ARE PROVIDED BY THE MANUFACTURER OR DISTRIBUTOR OF THE REPLACEMENT PARTS RATHER THAN BY THE MANUFACTURER OF YOUR MOTOR VEHICLE.

Op Codes

* = User-Entered Value	^ = Labor Matches System Assigned Rates	E = Replace OEM
NG = Replace NAGS	EC = Replace Economy	OE = Replace PXN OE Srpls
UE = Replace OE Surplus	ET = Partial Replace Labor	EP = Replace PXN
EU = Replace Recycled	TE = Partial Replace Price	PM = Replace PXN Reman/Reblt
UM = Replace Reman/Rebuilt	L = Refinish	PC = Replace PXN Reconditioned
UC = Replace Reconditioned	TT = Two-Tone	SB = Sublet Repair
N = Additional Labor	BR = Blend Refinish	I = Repair
IT = Partial Repair	CG = Chipguard	RI = R & I Assembly
P = Check	AA = Appearance Allowance	RP = Related Prior Damage



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2018 Dodge Grand Caravan SXT (JR307194)

Vehicle Overview

Vehicle Details	
Type	Used
Year	2018
Make	Dodge
Model	Grand Caravan
Trim	SXT
Mileage	158268
Exterior Color	Red
Interior Color	Black/alloy
Engine Size	Pentastar 3.6L Flex Fuel V6 283hp 260ft. lbs.
MPG (City/Hwy)	17/25 ³
Stock	JR307194
VIN	2C4RDGCGXJR307194
Location	Tulsa OK 74145



[\(https://www.carfax.com/VehicleHistory/ar20/UletCUFhYlmgczqdn43Q9YHLg6DLG0gC39pgXhR9sazjBMbAlAbwtcTfIMbws6xvR9Yzeu_Hv5kULvQ5PmX_is4WVNxoMmuSJGA\)](https://www.carfax.com/VehicleHistory/ar20/UletCUFhYlmgczqdn43Q9YHLg6DLG0gC39pgXhR9sazjBMbAlAbwtcTfIMbws6xvR9Yzeu_Hv5kULvQ5PmX_is4WVNxoMmuSJGA)

 Vehicle Under 30,000 Badge (/wheelchair-vans-for-sale/?resetfilters=on&price2=30000)

Estimate Your Payments		Conversion Details	
Price	\$26,991.00 ¹	Conversion Make	BraunAbility

Down Payment (\$)		Conversion Model	Braun Rear Entry
Interest Rate (%)		Entry Location	Rear Entry
Length of Terms (Months)		Entry Operation	Manual
		Entry Type	Fold Out
² Request Financing Approval (/financing/credit-application/)		Vehicle Features Mobility Equipment Rubberized Floor	
Get Our Best Price		Optional Equipment Backup Camera Installed	

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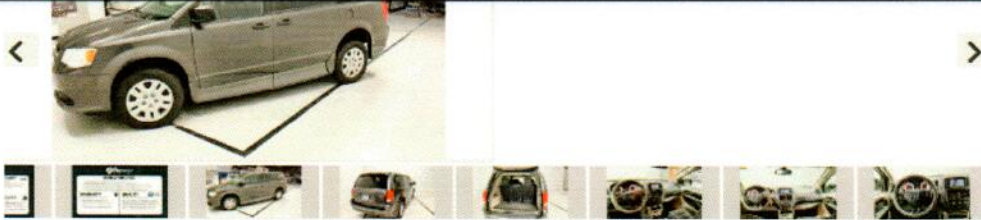


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USED 2019

DODGE GR CARAVAN SE

Take Control by putting yourself behind the wheel of a Dodge Grand Caravan wheelchair accessible van. For over three decades, the Grand Caravan, has been the go-to accessible van.

Mileage:

79,191

Exterior Color:

GRANITE PEARL

Interior Color:

BLACK/LIGHT GRAYSTONE

Stock #:

401226

VIN:

2C4RDGBG1K368278

OUR PRICE:

\$37,995

*ADDITIONAL INCENTIVES MAY APPLY

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START LIVE CHAT

Feature Highlights

All (24) [Convenience \(14\)](#) [Performance \(5\)](#) [Safety \(4\)](#) [Technology \(1\)](#)



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Hill Start Assist Will maintain brake pressure for a short period of time between the release of the brake pedal and the push of the...

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Trailer Sway Control Applies brake pressure on alternating wheels and may adjust engine throttle to help eliminate sway...

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Brake Assist Senses emergency braking by detecting the rate and amount of brake application and boosts the power as needed...

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Stow ... or removed fo...

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VEHICLE FEATURES

CONVERSION INFORMATION

- 2019 DODGE GRAND CARAVAN SE
- A/C WITH REAR HEAT & AIR
- MANUAL DRIVER & PASSENGER SEATS
- 3.6L V6 ENGINE
- SIDE CURTAIN AIRBAGS IN ALL ROWS
- TIRE PRESSURE MONITORING SYSTEM
- REAR BACKUP CAMERA
- 2ND ROW POWER WINDOW
- 17" X 6.5" STEEL WHEELS
- REAR PARK ASSIST
- POWER LOCKS
- POWER WINDOWS
- POWER MIRRORS
- TILT
- CRUISE CONTROL
- KEYLESS ENTRY
- DAYTIME RUNNING LIGHTS
- SUNSCREEN GLASS
- FLEX FUEL
- 50 STATE EMISSIONS
- POWER WINDOW GROUP
- ACTIVE HEAD RESTRAINTS
- REAR WINDOW DEFROSTER
- HD ENGINE COOLING
- HD RADIATOR
- AM/FM CD
- GRANITE PEARL
- BLACK/LIGHT GRAYSTONE
- BLACK SEATS

CONVERSION OPTIONS

WHY CHOOSE ROLLX

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Rollx Vans

I'm online! How can I help you with the Caravan? 🙋

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Price of Car



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Length of Loan

3 months 84 months

Trade in Value
\$.00

Estimated Down Payment
\$.00

[CALCULATE](#)

Loan amount: 0
Monthly payment: 0

0046



Renew by Rollx refurbishes used handicap vehicles, ensuring they feel brand new with:

- Comprehensive mechanical system evaluation and fixes.
- Interior component renovation for comfort and functionality.
- Exterior appearance restoration for an appealing look.

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Over 45 years of industry leading quality.



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Quality
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USED 2018
DODGE GR CARAVAN SXT
\$39,995

*ADDITIONAL INCENTIVES MAY APPLY

[VIEW DETAILS](#)



NEW CONVERSION 2017
CHRYSLER PACIFICA TOURING
\$39,995

*ADDITIONAL INCENTIVES MAY APPLY

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USED 2017
CHRYSLER PACIFICA TOURING
\$42,995

*ADDITIONAL INCENTIVES MAY APPLY

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HEATED LEATHER SEATS!

NEW CONVERSION! REAR ENTRY, LEATHER
HEATED SEATS



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6591 Highway 13 W
Savage, MN 55378



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you with the Caravan? 😊

EMS

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Seller Portal

ProQuote

All values are shown in USD

PROQUOTE RESULT



\$8,159.52

Low \$7,766.76

High \$9,809.14

Quote ID 8372D2D0EC

Generated 10/03/2024 07:50 AM

CRITERIA

Seller	CT02 - CINCINNATI INS-OHIO	Country	United States
Claim #	4369663	Vehicle Type	Automobile
VIN	2C4RDGBG9LR198134	Year	2020
Make	Dodge	Model	Grand Cara
Body Style		Engine Size	3.6L 6
Primary Damage	Side	Severity of Damage	Moderate
Secondary Damage		Vehicle Location	53538
Drivability Rating	Starts	ACV	\$32,125.00
Repair Cost	\$21,132.22	Loss Type	
Sale Title Type	Salvage Title	Drive Train	Front-wheel Drive
Keys		Odometer	
		Odometer Brand	



City of Fort Atkinson
Director of Public Works Office
101 N. Main Street
Fort Atkinson, WI 53538
920-397-9901

REQUEST FOR PROPOSALS (RFP): Automotive Repair Services – 2020 Dodge Grand Caravan BraunAbility Van

The City of Fort Atkinson is seeking proposals for automotive repair body shops to repair damages to the following vehicle or equipment:

Year/Make/Model: 2020 Dodge Grand Caravan BraunAbility Van

Known/Observed Damages: Vehicle has damage to the left rear door, quarter panel, rocker panel, running board, and floor pan. Possible additional damage to the floor and inner structures.

Proposals will be accepted until November 28, 2024 at noon. Proposals must be submitted electronically to Sarah Weihert via e-mail to sweihert@fortatkinsonwi.gov with a subject heading of "*Company Name* – Automotive Repair Services Proposal for City of Fort Atkinson 2020 Dodge Grand Caravan." A response indicating receipt will be provided.

Pictures of the vehicle and damage are included at the end of this RFP. Contractor(s) must comply with all applicable federal, state, and local laws, rules, regulations, ordinances and codes to provide the services under this RFP. Contractor(s) shall provide all material, labor, parts, and equipment to perform repairs included in their proposal.

This vehicle cannot be driven in its current state so an on-site pre-bid inspection is recommended. The vehicle is located at Brown Cab Service Inc., 735 Madison Ave., Fort Atkinson. Call John Will at 920-723-1945 to schedule an appointment.

Proposal submittal shall include the following as a minimum requirement:

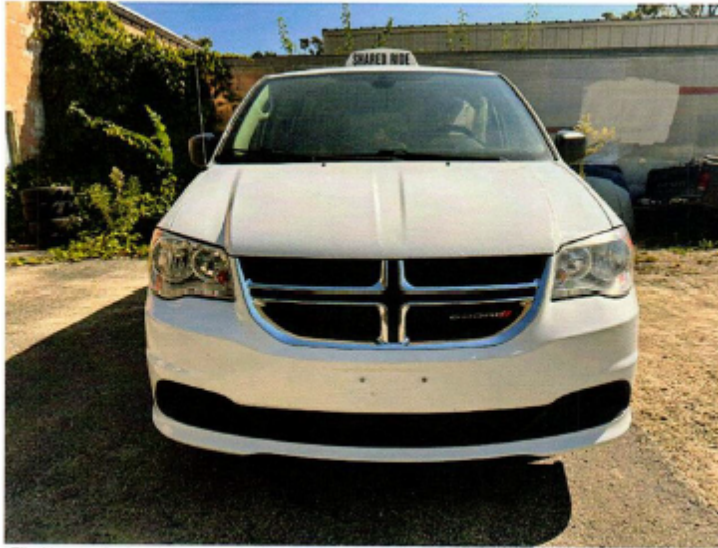
1. Detailed estimate of proposed repair services including all material, labor, parts, and equipment.
2. Proposed schedule to begin and complete repairs.
3. Ability to arrange salvage title inspection by a certified state inspector.
4. Warranty – Minimum one year / 12,000 miles warranty on workmanship and paint.

NOTE – The vehicle must pass inspection by a Certified State Inspector following the repairs and be placed back into service as a taxi.

City reserves the right to request additional information including but not limited to: relevant certifications/licenses, qualifications, and references to verify vendors capability to perform the work.

The work will be awarded to the lowest responsible bidder. The City reserves the right to reject any and all bids at its discretion.

Instructions to responders: Any questions regarding this RFP should be submitted via e-mail to Andy Selle at aselle@fortatkinsonwi.gov at least 24 hours prior to final proposal acceptance date and time to allow reasonable time to issue any items of clarification or addendums.



File Name / Description:
FRONT



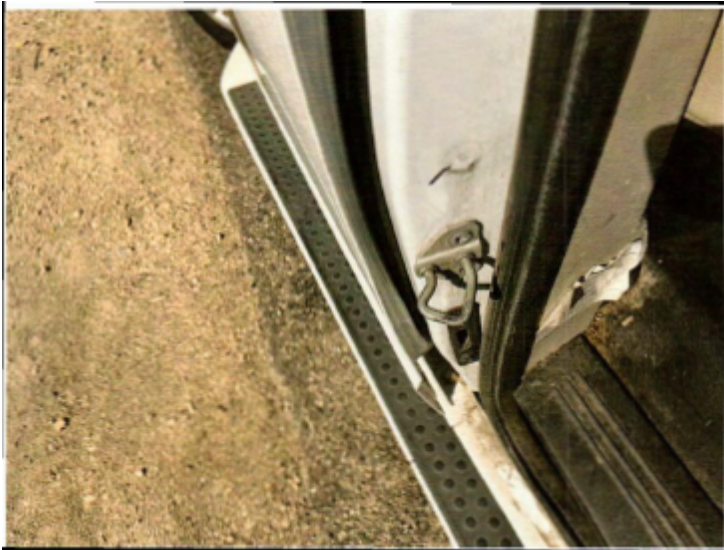
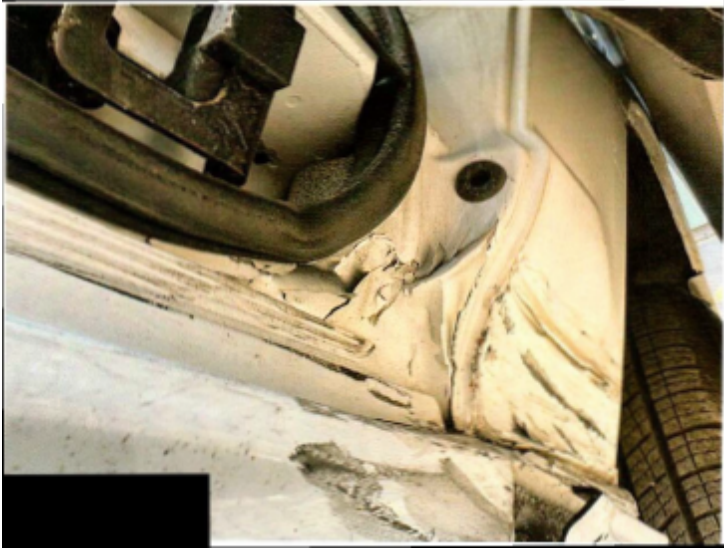




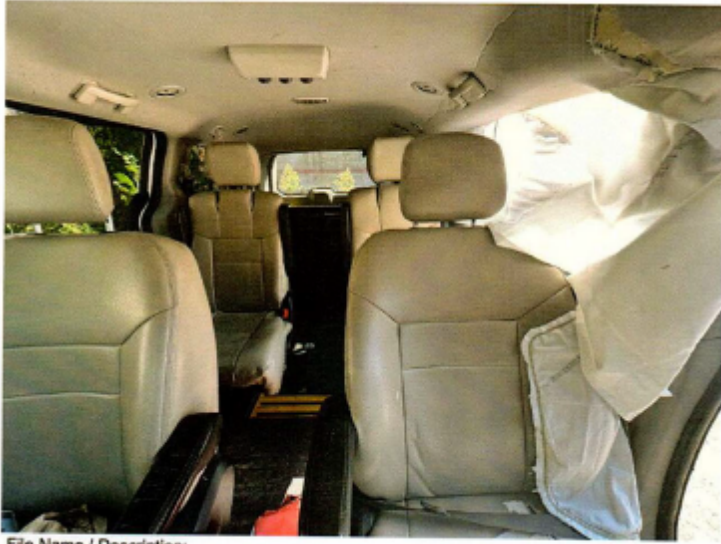












File Name / Description:
INTERIOR





File Name / Description:
MIL



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action to authorize the City Manager to execute the 2025 Joint Powers Agreement with Jefferson County for the County 911 Emergency System (Houseman, City Manager)

BACKGROUND

Annually, Jefferson County seeks action from the County's municipalities to enter into a "Joint Powers Agreement" for the County 911 emergency system. The Agreement states that if an emergency services vehicle is dispatched in response to a 911 call for service through the County's dispatch system, that vehicle and its personnel will render aid to the persons needing such aid or services, regardless of whether the vehicle is operating inside or outside the vehicle's normal jurisdictional boundaries.

DISCUSSION

Executing this Joint Powers Agreement will allow for City of Fort Atkinson emergency vehicles to respond outside of their jurisdiction when dispatched with impunity. It also allows for other municipal emergency service providers to respond within the City when dispatched through the County's 911 system.

This Agreement is required per State Statutes when the County has implemented a 911 system, as Jefferson County has done, and is necessary to provide emergency services to those in need, regardless of jurisdictional boundaries.

FINANCIAL ANALYSIS

There are no costs associated with this Agreement.

RECOMMENDATION

Staff recommends that the City Council authorize the City Manager to execute the Joint Powers Agreement for 2025.

ATTACHMENTS

1. Joint Powers Agreement

Office of the Sheriff - Jefferson County

411 S. Center Avenue, Jefferson, WI 53549



Travis W. Maze, Sheriff

Jerry A. Haferman

Donald C. Hunter

Undersheriff

Chief Deputy

VACANT
JAIL CAPTAIN



MATTHEW KANTERS
PATROL CAPTAIN



MARGARETA GRAY
ADMINISTRATIVE CAPTAIN



December 2, 2024

Honorable Mayor/Chairperson/President/City Manager:

Re: 911 Joint Powers Agreement

Wisconsin Statute 256.35(9)(a)(b) requires that a 911 Joint Powers Agreement be executed and filed with the Attorney General's office on a yearly basis.

The Mayor/Chairperson/President/City Manager of a municipality, town, or village must sign and return the enclosed Joint Powers Agreement to me. At that time, I will endorse the agreement and have the original signed by the Jefferson County Clerk as well. As required by Wisconsin Statute 256.35(9)(c), the original document will then be filed with the Attorney General's office and a copy, with signatures, will be returned to you for your files.

If you have any questions please feel free to contact me at 920.674.7329.

Sincerely,

Travis W. Maze
Sheriff

Enclosure

**JOINT POWERS AGREEMENT
COUNTY 911 EMERGENCY SYSTEM**

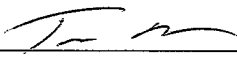
WHEREAS, Jefferson County and the municipalities located within the boundaries of Jefferson County have implemented an Emergency 911 System for the purposes of providing emergency services to residents and visitors of these municipalities, including fire fighting, law enforcement, ambulance, medical and other emergency services; and

WHEREAS, Sec. 256.35(9)(a)(b), Wis. Stats. "Joint Powers Agreement," requires that in implementing a 911 system as has been done in Jefferson County, municipalities shall annually enter into a Joint Powers Agreement, in which Agreement shall be applicable on a daily basis and which shall provide that if an emergency services vehicle is dispatched in response to a request through the Jefferson County 911 System, such vehicle shall render its service to the persons needing the services, regardless of whether the vehicle is operating outside the vehicle's normal jurisdictional boundaries.

THEREFORE, in consideration of the mutual promises, agreements, and conditions contained herein, it is hereby jointly agreed between Jefferson County and the **City of Fort Atkinson, Wisconsin** as follows:

1. Effective as of January 1, 2024, this Agreement shall, thereafter, be applicable on a daily basis for one year.
2. That if an emergency services vehicle operated by the municipality, or operated by an agency with which the municipality contracts for that particular emergency services, is dispatched in response to a request through the Jefferson County Emergency 911 System, such vehicle (whether owned and operated by the municipality or by the agency) shall render its services to the persons needing the services, regardless of whether the vehicle is operating outside the vehicle's normal jurisdictional (or as defined by contract) boundaries.
3. That a copy of this Agreement shall be filed with the State Department of Justice, as required by Sec. 256.35(9)(c), Wis. Stats.

JEFFERSON COUNTY (Dispatching agency)

By:  dated: 12-2-24
Travis W. Maze, Sheriff

JEFFERSON COUNTY CLERK

By: _____ dated: _____
Audrey McGraw

CITY OF FORT ATKINSON (Participating agency)
(Town/City/Village of)

By: _____ dated: _____
Rebecca Houseman, City Manager



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to an Amendment to the Agreement for Solid Waste and Recyclable Collection and Disposal between the City of Fort Atkinson and GFL Solid Waste Midwest, LLC (Houseman, City Manager)

BACKGROUND

The City of Fort Atkinson has an Agreement for the collection of solid waste and recyclable materials with GFL Solid Waste Midwest LLC ("GFL"). The original agreement was made in August of 1998 with Superior Services, Inc. and has been assigned multiple times to other solid waste and recycling collection companies.

DISCUSSION

The current Agreement dictates the allowable increase to the contract cost to the City, which equates to 1/2 of the annual Consumer Price Index (CPI). While this has been positive for the City over the past several years, especially when inflation has been high, it has not been positive for GFL. GFL, like all other public and private sector organizations has seen an increase in cost for employee salaries and benefits, as well as equipment. Further, while recycling used to be a source of revenue for collection contractors, that market dropped almost entirely. Now, contractors typically must pay another company to receive and recycle the items collected.

In addition to the cost pressures on GFL, there have also been ample customer services issues over the past 2 years. City residents have called City staff as well as GFL directly with complaints about missed collection, missed bulk collection, and messes created (and not cleaned up) stemming from automated collection. The number of complaints appears to grow in the summer months and taper off in the fall. However, bulk collection complaints continue to be lodged.

In April 2024, GFL requested a 9% increase in the contract cost. Per the contract, and the City's general inability to contribute additional unbudgeted funds mid year, the City rejected the request. Again in November, GFL provided the attached request for a 9% increase in the contract cost. At that point, City staff scheduled a meeting with Jason Johnson from GFL to discuss both the customer service issues and the contract cost.

During those discussions, several alternatives were provided for a path forward. Through negotiation and consultation with the City Council, GFL and City staff came to a solution outlined in the attached Amendment to the Agreement for Solid Waste and Recyclable Collection and Disposal.

The Amendment changes the following aspects of the Contract:

1. *The Agreement will terminate on December 31, 2025.* City staff intends to prepare a Request for Proposals for collection services in spring 2025 with the goal of having a new contract in place starting on January 1, 2026. Note that nothing in this agreement or amendment disallows GFL from providing a proposal for services for 2026 and beyond.
2. *Bulk pick up is limited to 1 unit, and residents must call and schedule the pick up with GFL customer service.* The current contract allows for two units or items to be picked up and does not require that the customer call and schedule the pick up. This change will reduce the pressure on GFL and will reduce the number of complaints relating to items left on the terrace for weeks at a time.
3. *GFL will provide distributable materials detailing the definition of "bulk items" and will assist in communication to City residents.* Communication relating to this topic will be very important as it is a significant change from the current practice.
4. *The 2025 cost of the contract will increase by 2%.* Per the current contract, this increase would be 1.3%, based on the 2.6% CPI. A 2% increase was included in the 2025 budget during the budgeting process, as staff did not know the exact CPI number during the budget process.

FINANCIAL ANALYSIS

The expenditures associated with this contract are located in the Public Works Recycle/Refuse section of the operating budget (page 87 of the 2025 budget document). There are two accounts used for these expenditures relating to the contractor and the sanitary landfill. The total budgeted in the 2024 budget in these accounts was \$771,116.40. A 2% increase was included in the 2025 budget, for a total of \$786,538.73.

It is important to note that the City has benefited from this contract language relating to cost for many years. Staff has reached out to other contractors and found GFL's rates, per the existing contract, to be significantly less expensive than others. As such, the City Council and the public should expect an increase in contract costs starting in 2026 and beyond. Because state-imposed levy limits prohibit the City from raising more operating revenue through property taxes, the City Council and staff will be tasked with coming up with other ways to pay for this expected and important service. Such options include removal of these charges from the tax levy and placing them on the bi-monthly utility bill; or removing these charged from the tax levy and placing them on the annual tax bill as a separate line item. City staff and the City Council will work through these options in the upcoming year.

RECOMMENDATION

City staff recommends that the City Council approve the attached Amendment to the Agreement for Solid Waste and Recyclable Collection and Disposal between the City of Fort Atkinson and GFL Solid Waste Midwest, LLC, and direct the City Manager to execute on behalf of the City.

ATTACHMENTS

1. COFA GFL Amendment 12.17.24
2. City of Fort Atkinson 2024 PI Memo
3. Fort Atkinson Contract w 2007 Addendum

AGREEMENT FOR SOLID WASTE & RECYCLABLE COLLECTION & DISPOSAL AMENDMENT

This Amendment, by and between the City of Fort Atkinson, (hereinafter referred to as the "City"), and GFL Solid Waste Midwest, LLC (hereinafter referred to as "GFL"), is made and entered this ____ day of _____, 2024. The parties agree as follows:

RECITALS

- A) The AGREEMENT FOR SOLID & RECYCABLE COLLECTION & DISPOSAL signed by the parties on 8/24/98 (hereinafter the "AGREEMENT"), was amended via an ADDENDUM TO AGREEMENT FOR SOLID WASTE & RECYCABLE COLLECTION & DISPOSAL dated 9/25/2007 (hereinafter the "ADDENDUM").
- B) That the parties hereto wish to further amend the terms of the above AGREEMENT and the ADDENDUM.
- C) The GFL was previously known as Superior Services Inc. and Veolia Environmental Services SW Midwest LLC.

NOW THEREFORE, FOR A VALUABLE CONSIDERATION, THE PARTIES HERETO AGREE AS FOLLOWS:

1. That Section 1, Paragraph 2, of the AGREEMENT shall be amended in its entirety to read that parties agree to terminate the AGREEMENT and the ADDENDUM effective December 31, 2025. No additional notices of any kind are needed as to either of the parties and all automatic renewals are terminated. Any documents, not referenced hereto, including emails indicating other notices to terminate are necessary are hereby declared null and void.

2. That Paragraph 4 of the ADDENDUM addressing Section II, 12., relating to bulk items shall be amended to read "(1) One item per collection, and the resident must schedule the collection with Customer Care; the definition of bulk items shall be waste items that are larger than three (3) feet in any dimension, and/or heavier than fifty (50) pounds in weight, and/or otherwise will not fit within an Approved Container, thus too large or too bulky to be collected by Contractor as part of its normal collection. Such items include, but are not necessarily limited to mattresses and box springs, household furniture (couches, chairs, tables, cabinets, dressers, etc.), large toys, bicycles, fish aquariums, sofas, chairs, tables, carpets (no longer than four feet in length and 12 inches in diameter), sinks, laundry tubs, windows, doors, and other similar items. GFL agrees to provide distributable materials detailing the definition of "bulk items" and will assist in communication to City residents.

3. That Paragraph 6 of the ADDENDUM addressing Section II, 17., shall be amended to increase the rate paid by the City to GFL by 2% for 2025 to the following:

Monthly Solid Waste Collection per Household Unit:	\$6.07
Monthly Recyclables Collection per Household Unit:	\$3.72
Per ton rate for Solid Waste Disposal:	\$53.06
Monthly Solid Waste Collection per Multi-family/Commercial Unit:	\$6.07

4. That all other terms and conditions of the AGREEENT and the ADDENDUM are hereby reaffirmed by the parties.

IN WITNESS WHEREOF, the parties have executed this Amendment on the day and year first above written.

CITY OF FORT ATKINSON

By: _____
Rebecca Houseman, City Manager

By: _____
Michelle Ebbert, City Clerk

GFL Solid Waste Midwest, LLC

By: _____
Mike Stoeckigt, Area Vice President

Drafted by:
David R. Westrick
City of Fort Atkinson Attorney
93 N. Main St.
Fort Atkinson, WI 53538
920-563-5577
drw@rogerswestricklawoffice.com

April 22, 2024

Memo

TO
Rebecca Houseman

FROM
Jason Johnson



RE
Price Adjustment
Request

As your trash and recycling service provider since 1998, GFL is proud to partner with the City of Fort Atkinson in providing efficient and economical services to Fort Atkinson and its residents.

Much like the City, GFL is not immune to rising costs and changing markets over the duration of the contract. Since the signing of the contract in 1998, we have seen many large increases, including but not limited to:

- Cost of fuel
- Wages and Benefits
- Plummeting value of recyclables
 - Being paid for recyclables 1998-2017; now paying to recycling costs
- Skyrocketing maintenance for parts, tires, oil, etc.

The current contract allows GFL to increase the monthly charges by 50% of the annual Consumer Price Index (CPI). From 1998-2021 the average annual CPI was 1.9%, and GFL was allowed to increase the rates on average by 0.95%. The average annual CPI from 2021-today is now 5.5%, and GFL was allowed to increase by only 2.75%, which is not sustainable for us to provide you with high-quality, timely and professional services.

The current agreement does allow GFL to petition the City for an increase greater than 50% of the CPI, but not to exceed 9% (Section 39). This memo is to request to increase our rates by 9% due to the current inflationary climate and costs of processing recyclables as detailed above effective July 1, 2024. There would not be any annual price adjustment in 2025.

Additionally, GFL is requesting to amend the annual price adjustment clause to the following: Rates shall be increased annually by the greater of either (a) two and one-half percent (2.5%) or (b) 100% of the Consumer Price Index (CPI-U Midwest), but not to exceed 6%.

GFL is committed to maintaining our service standards and this price increase will help us to maintain these values as we move forward. If you have any questions or concerns, please reach out via email or phone.

Thank you for your understanding!

GFL ENVIRONMENTAL SERVICES

j.johnson@gflenv.com
262.893.9156



**ADDENDUM TO AGREEMENT FOR SOLID WASTE & RECYCLABLE
COLLECTION & DISPOSAL DATED AUGUST 24, 1998**

This Addendum to Agreement for Solid Waste & Recyclable Collection & Disposal is made and entered this 25 day of September, 2007, by and between the City of Fort Atkinson, a municipal corporation ("City") and Superior Services, Inc., now know as Veolia Environmental Services SW Midwest LLC, a Wisconsin corporation ("Veolia"). The parties agree as follows:

1. The name of Superior Services, Inc. shall be changed to Veolia Environmental Services SW Midwest LLC.
2. Section I, 3.d. shall be amended to read as follows:

"The refuse container shall be a 95-65-35 gallon container. The container shall meet specifications set forth by Veolia."
3. Section I, 9. The following sentence shall be added to paragraph one: "A written notice of material breach shall be provided by the City of Fort Atkinson or Veolia within 30 days to resolve said breach to the other's satisfaction."
4. Section II, 12. The following language shall be added to paragraph 1: "Each resident (4 units or less) will be required to utilize their provided container, and will be required to place at curbside unobstructed for collection by 6:00 a.m. the day of designated collection. Each resident will have the opportunity to dispose of bulk items, not to exceed one cubic yard in volume, on the third week of each month. Such bulk items should be placed in appropriate containers, if possible."
5. Section II, 12. The following paragraphs shall be added:

"Residents will have access to additional refuse containers for weekly solid waste pick up at an additional charge billed directly by Veolia to said resident on a year in advance basis."

Recycling Collection shall be performed on the same day as Solid Waste collection, on alternating weeks. All recyclable material shall be placed in the provided container and do not have to be separated.

All residents shall have access to, at their own expense, the Transfer Station at 1205 Klement Street in Fort Atkinson from 8:00 am. to 4:00 p.m., Monday through Friday, and every Saturday from 8:00 a.m. to 12:00 noon.

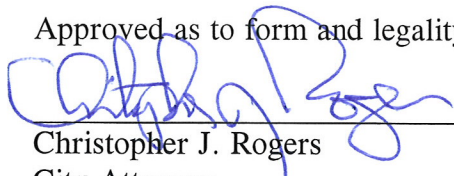
6. Section II, 17. The following paragraph shall be added:

“There shall be a suspension of annual adjustment for 2008. Therefore, the rate for 2008 shall be the same as for 2007. The next available date for increase of rates shall be January 1, 2009.”

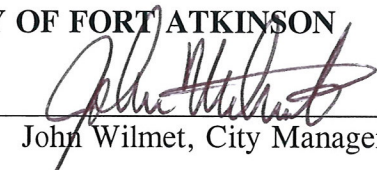
7. Section V, 36. shall be amended to read as follows: “Veolia agrees to remove and dispose of all solid waste collected under this contract from residential, multi-family and commercial units. Such solid waste shall be disposed of in a Wisconsin DNR-approved site.”
8. Except specifically amended herein, the terms and conditions of the agreement signed by the parties and dated August 24, 1998, are hereby affirmed.

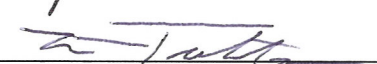
Dated this 25 day of September, 2007.

Approved as to form and legality:


Christopher J. Rogers
City Attorney

CITY OF FORT ATKINSON

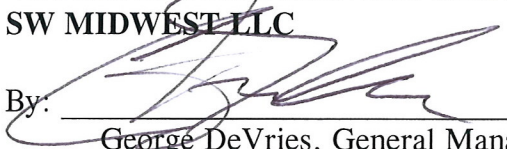
By: 
John Wilmet, City Manager

By: 
Matthew Trebatoski, City Clerk

Reviewed for engineering:


Jeffrey L. Woods, P.E.
Director of Public Works

**VEOLIA ENVIRONMENTAL SERVICES
SW MIDWEST LLC**

By: 
George DeVries, General Manager



CITY OF FORT ATKINSON, WISCONSIN 53538

MUNICIPAL BUILDING

101 North Main Street 920-563-7760

Fax 920-563-7776

www.fortatkinsonwi.net

SEP 28 2007

September 25, 2007

George DeVries
VEOLIA SERVICES
1215 Klement Street
Fort Atkinson WI 53538

Re: Contract Addendum

Dear George:

Enclosed are two copies of the Addendum to our Agreement for solid waste and recycling collection and disposal. The City has executed them; could you also, and send me one of the originals.

Thanks George, it has been a pleasure working with you on the change to our collection process.

Sincerely,

John Wilmet
City Manager

JW/lc

Enc.

COPY

**AGREEMENT FOR SOLID WASTE & RECYCLABLE
COLLECTION & DISPOSAL**

This agreement made and entered into as of the 24 day of AUGUST, 1998, by and between the City of Fort Atkinson, a municipal corporation (City) and Superior Services, Inc., a Wisconsin corporation (Superior).

NOW THEREFORE, THE PARTIES AGREE AS FOLLOWS:

SECTION 1 -- GENERAL TERMS

1. Purpose of the Contract - Superior shall collect all solid waste and refuse available for collection within the boundaries of the City for all residential, multi-family and commercial units. Collection will be once per week for residential and multi-family units. Collection will be once per week for commercial units with a limit of two 30-gallon containers collected per week.

Garbage and refuse disposal for residential and multi-family units will be paid for by the City on a per ton basis. Disposal for commercial units will be paid for by the commercial unit. Superior shall also collect all recyclables (as defined herein) from all residential units (four units or less).

2. Term of Contract - This contract ends no earlier than December 31, 2003. Each year, beginning January 1, 2000, the contract will

be extended for a full year unless one of the parties notifies the other in writing that the contract is not to be extended. The first extension will be for the year January 1, 2004 to December 31, 2004. Notice to prevent such automatic extension should be given between September 1, 1999 and November 30, 1999. The parties intend that the contract will be automatically extended indefinitely as provided in this paragraph until a party notifies the other party of that party's election not to extend the contract. The commencement date of this contract will be January 1, 1999.

3. Definitions:

- a. The term "solid waste" shall mean animal and vegetable wastes resulting from the handling, preparation, cooking, service and consumption of food. "Solid waste" shall also include all solid wastes (except body wastes), including but not limited to rubbish, and excluding recyclables as defined by State Statute. Large cartons are included in this term, provided they are broken down and placed inside a standard size refuse container. Various items of furniture commonly found in most households would be included and procedures are defined on Section II part 12 paragraph 3.
- b. The term "solid waste collection" or "collection" shall mean the taking up of all solid waste accumulated in containers at residential, multi family and commercial units within

the corporate limits of the City.

- c. The term "residential unit" shall mean a separate dwelling place with kitchen. Buildings containing four (4) separate dwelling places or less are considered to be a "residential unit" for the purpose of this agreement. The term "multi-family unit" shall mean a building containing five (5) or more residential units. The term "commercial" shall mean a business, as defined by the City Assessor, and assessed on the assessment roll as commercial property doing business within the City limits. All units shall be within the legal boundaries of the City. All industries where property is assessed by the Department of Revenue as manufacturing property are excluded from this contract.

A detailed listing by service address and unit types will be developed by the City and provided to Superior. Said listing will identify service address and the corresponding unit type (residential, multi-family, commercial or industrial). Said classification shall be determined by the primary use of such property as set forth in the City's assessment rolls and other official records.

- d. The term "refuse can" or "container" shall mean a receptacle which does not exceed 30 gallons in capacity; which is of such size and form as to permit collection by one person; which is fitted with handles and lids whenever practical; or which is a box or carton not exceeding 20 inches in any

of its dimensions.

- e. The term "Consumer Price Index" or "C.P.I." shall mean the relative cost of living prepared by the United States Government for urban wage earners and clerical workers, all items (based on Milwaukee, Wisconsin, as the urban area).

4. Equipment - Superior agrees to furnish at its own expense, all necessary equipment, tools, trucks and all labor and manpower to collect, remove and dispose of all garbage and recyclables as defined herein. Superior further agrees to perform all duties assigned to it in a good and workmanlike manner.

Superior also agrees to provide and use uniformly covered truck bodies of the "packer" type which shall be of metal, watertight, and designed and manufactured for the collection of solid waste and recyclables. Superior shall provide trucks labeled with detachable signs to distinguish if said trucks are collecting on a residential, multi-family or commercial route. The truck bodies shall be washed as often as necessary to keep the same clean and reasonably attractive. Those operating trucks for Superior shall clean up any garbage or recyclables that drop off the trucks while loading or traveling on the streets of the city. Such trucks shall not be allowed to stand in any street or alley longer than is reasonable and necessary to fulfill the terms of this agreement.

The employees of Superior shall handle the permitted containers in which solid waste and recyclables are placed in a

careful manner and return same to locations provided after said containers have been emptied. Upon any container being damaged through mishandling or negligence of employees of Superior, the same shall be restored to its former condition or replaced at Superior's expense. In the event Superior determines that a container is in an unsanitary condition, it shall cause such container to be tagged accordingly.

5. Local Office and Customer Service - Superior shall establish and maintain within the City of Fort Atkinson, or in a location approved by City, an office with continuous supervision for accepting complaint and customer calls. The office shall be in service during the hours of 8:00 a.m. to 4:00 p.m., local time on all days except Saturday, Sunday and holidays as specified in this contract as days when no collection is to be made. Address and telephone number of such office and any changes therein shall be given to the City in writing.

A full-time superintendent of collection shall be employed by Superior who shall be the agent for Superior under this contract. The Superintendent shall have supervisory duties only which duties may include servicing of complaints, and he shall be on the job within the City during normal hours of collection operations and shall maintain proper schedules for collection.

The City may appoint inspectors who may have access to Superior records and equipment at reasonable times in order to adjust citizen complaints.

A record of all complaints and action taken thereon shall be kept by Superior and reported upon request to the City. All complaints shall be answered by Superior courteously and promptly.

Whenever City or a resident notifies Superior of locations which have not received scheduled service, Superior is required to service such location before 7:00 p.m. of the same day when notified prior to 12:00 noon. When notified after 12:00 noon, Superior shall service such locations not later than 10:00 a.m. of the following day, excluding Sundays.

Superior shall comply with ordinances of City and laws and regulations of the State of Wisconsin and its agencies relating to sanitation and collection of solid waste in effect during the terms of this agreement. Superior shall keep all equipment used in the performance of the work in good operating condition and in a clean, sanitary condition. Equipment is subject to periodic inspection by City.

Superior shall undertake to perform all collection services rendered hereunder in a neat, orderly and efficient manner, to use care and diligence in the performance of this contract, and to provide neat, orderly and courteous employees and personnel on its crews. Superior will, in so far as possible, hire local people to carry out the terms of this contract. Superior also agrees to use its best effort to prohibit drinking of alcoholic beverages and drug use by its drivers and crew members while on duty or in the course of performance under this contract.

6. Collection Lists - At the beginning of each six (6) month period, City shall furnish Superior with a list of all dwelling units to be added or discontinued from collection. In the event in any 6 month period no such list is supplied by the City, Superior shall continue collection in the new months on the same basis as the preceding month until such time as the unit adjustment can be determined. At such time additional units will be adjusted retroactively.

7. Insurance Required - Superior shall maintain and file policies or certificates thereof with City on workmen's compensation insurance, and liability insurance during the whole period of this contract in the sum of Ten Million Dollars (\$10,000,000.00) covering claims for personal injury to one person and Ten Million Dollars (\$10,000,000.00) covering claims to more than one person in the same accident, and Ten Million Dollars (\$10,000,000.00) for claims for injury to property, which shall insure City as a named insured, as well as Superior against liability imposed by law on City or Superior by employees in connection with the performance of this contract, including claims arising out of the use or operation of any vehicle used by Superior in performing this contract. Such policies shall be approved by the City Council and filed with the City Clerk. Superior shall also maintain and file a Ten Million Dollar (\$10,000,000.00) limit umbrella liability policy.

8. Indemnity - Superior agrees to indemnify and save harmless City from any and all claims and causes of action which may be asserted against City on account of any act or omission of

Superior, Superior's employees or agents, in connection with Superior's performance of this contract, to defend any action brought against City on any such claim, and to pay and satisfy any judgment entered thereon together with all costs and expenses incurred in connection therewith. City shall in no way be liable for any claims or charges incurred by Superior in performance of this contract.

Superior must hold a permit for solid waste collection and transportation service from the Wisconsin Department of Natural Resources, Division of Environmental Protection.

9. Termination and Breach of Contract - City shall have the right to terminate this contract in the event of a material breach of same by Superior. Under such circumstances said contract shall terminate upon written notification to Superior by the City. This contract shall terminate and neither party nor officers of the City shall be liable for further performance after such termination, it shall become invalid by reason of any present or future law other than an ordinance of the City.

In lieu of termination and upon the failure of Superior to fulfill any of the provisions of the contract, the City Manager shall be authorized to hire personnel and equipment, or assign City employees and equipment as may be necessary to do such work and the cost and expense thereof may be charged and deducted from any monies due Superior, collection from Superior, or collected by recourse to Superior's bond.

10. Discrimination Prohibited - Superior shall comply in all respects the State Law relative to discrimination, which reads as follows: "Every contract for or on behalf of the State of Wisconsin, or any county, city, town, township, school district, or any other district in the State, for materials, supplies or construction shall contain provisions by which Superior agrees:

- a. That, in hiring of common or skilled labor for the performance of any work, under any contract, or any subcontract hereunder, no contractor, material supplier or vendor shall, by means of age, race, creed, color, handicap, marital status, sex, national origin, ancestry, sexual orientation, ancestor record, conviction record, or membership in the Wisconsin National Guard or other reserve component of the military forces of the United States discriminate against the person or person who are citizens of the United States who are qualified and available to perform the work to which such employment relates.
- b. That, no contractor, material supplier, or vendor shall in any manner discriminate against, or intimidate, or prevent the employment of any such person or persons, or on being hired, prevent or conspire to prevent any such person or person from the performance of work under any contract on account of age, race, creed, color, handicap, marital status, sex, national origin, ancestry, sexual orientation, ancestor record, conviction record, or membership in the Wisconsin National Guard or other reserve component of the

military forces of the United States.

c. The City may terminate this contract for a material violation of these provisions.

11. Assignability - This contract shall not be assignable by Superior in whole or in part without the consent of the City. The City agrees not to withhold such consent unreasonably.

SECTION II -- SOLID WASTE COLLECTION

12. Superior shall collect and remove from each residential unit (as on the collection list as set forth in paragraph 6 herein) all solid waste as defined herein on a weekly basis. Superior shall collect and remove from each multi-family and commercial unit all solid waste on a weekly basis.

Specifically excluded from collection are sludge, building material, board lumber, carpet, auto parts, tires, automotive batteries, rocks, dirt, concrete, all appliances, excessive building materials such as drywall, plaster, siding, windows, doors, etc., items required to be recycled, medical waste, all hazardous or toxic materials as defined in the State of Wisconsin, D.N.R. Regulation NR 181, yard wastes defined as leaves, grass clippings, garden debris and brush, including clean woody vegetative material no greater than six (6) inches in diameter.

Reasonable amounts of furniture and other bulky items would be included at no cost to the resident. Residents would need to call the office to arrange for pick up of these items.

13. It is further agreed by and between the parties hereto that Superior shall not be obligated to collect solid waste unless the same has been drained of water, wrapped and deposited in a garbage can, standard size trash bags or other suitable containers. The only exception to this being broken glass, which must not be wrapped.

It is further agreed by and between the parties hereto that all garbage cans must be in good condition, not over thirty (30) gallon capacity, and kept tightly covered at all times, and that Superior is not obligated to collect any garbage not contained in a can or other suitable container, which can must be placed at the curb of the street abutting each collection site, except in those instances where a collection site is served by an alley. Then, in such cases, collection shall be made in the alley abutting the Central Business District.

At the time of collection container must be placed at the curb edge and in such a way that the collection vehicles can drive up to the cans, except for multi-family and commercial units, which must provide access to Superior's trucks so it can perform its duties as set forth herein.

14. The parties acknowledge that all containers are to be in place

for collection on collection day by 6:00 a.m., and removed by 5:00 p.m., of the same day.

15. Superior shall not begin actual collection before 6:00 a.m., or continue collection after 5:00 p.m. Superior shall contact the City relative to complaints, providing the name and address of the complainant and the nature of the complaint and the proposed remedy. Superior shall maintain telephone service at its local office for receiving calls or complaints relative to service. Superior shall resolve all complaints within a twenty-four (24) hour period or within the next working day. At its local office, Superior shall maintain a drop-off for materials not collected by the weekly pick up. This service will be for City residents only, and Superior will charge said residents a price per ton for this service as set forth in paragraphs 31, 38, and 39. This service will be available from 9:00 a.m. to 4:00 p.m. Monday through Friday, and 9:00 a.m. to 12:00 noon on Saturdays, legal holidays excepted.

16. The observed holidays for this contract are New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and Christmas Day. The holiday collection schedule rule is next collection after the holiday. Please note the following examples:

**If the holiday occurs on Friday, the observed holiday is Friday, and collection will occur on Saturday.

**If the holiday occurs on Saturday, the observed holiday is

Saturday, and Saturday's work is done of Friday.

**If the holiday occurs on Sunday, the observed holiday is Monday, and collection will occur on Tuesday; Tuesday collections will be made on Wednesday, etc.

**If the holiday occurs on Monday, the observed holiday is Monday, and the collection will occur on Tuesday; Tuesday collections will be made on Wednesday, etc.

17. The City shall pay to Superior on a monthly basis for such collection and removal based upon the number of pick-ups per classification no later than twenty (20) days after the last day of each month during the life of this contract. As stated above, the pick up lists shall be adjusted semi-annually by the City.

The City shall pay to Superior for the year January 1, 1999 through December 31, 1999 at the following rates:

a. Residential solid waste and recycling collection:

\$7.16 per unit per month

b. Commercial and multi-family solid waste collection only:

\$4.43 per unit per month.

There will be no increase in this rate until January 1, 2000.

Presently there are 3,786 residential units and 940 commercial units.

18. The parties specifically agree that Superior, at no additional cost to the City, shall collect all solid waste and recyclables at City-owned locations of which there are approximately 19 at the present time, including collection points at all City parks. The City shall have access to the drop-off site at the rate charged to City of Fort Atkinson residents as set forth in paragraph 31 herein.

19. The unit charges to be paid to Superior by City shall be adjusted on an annual basis. The annual adjustment shall be calculated on each anniversary date (January 1) that this contract is in force. The amount of the adjustment shall be a sum equal to 50% of the change in the preceding year's C.P.I. as defined herein, not to exceed 9% per year.

SECTION III -- RECYCLABLE COLLECTION

20. Superior shall make a separate, same day weekly curbside collection of all allowable recyclables placed in City-furnished containers, and transport the same to a recycling facility in a separate vehicle. The location of this facility shall be identified by Superior and disclosed to the City. The proceeds from the sale of all recyclables collected within the City by Superior under the terms of this contract shall belong to Superior.

21. Allowable commingled recyclables shall include, but not be limited to:

- a. Glass containers - various colors
- b. Aluminum cans
- c. Steel/tin cans
- d. Plastic bottles - #1, #2, #3, #4, #5, #6, & #7
- e. Corrugated paper and other container board.
- f. Foam polystyrene packaging (effective January 1, 2000)
- g. Bi-metal aluminum/steel containers
- h. Newspapers & other materials printed on newspaper
- I. Magazines & other material printed on similar paper
- j. Office paper/mail
- k. Waste oil (in separate non-breakable containers, maximum size of one gallon
- l. Lead acid vehicle batteries (casing must be unbroken)
- m. Aerosol containers (can be commingled with items "a" through "g")

Residents will commingle items "a" through "g" and "m", but will be required to separately bag or tie items "h", "I" and "j" as set forth above. Superior shall be required to keep newspapers and other paper product recyclables separate from all other recyclable items.

Markets for some of the allowable recyclables listed above may be poor, thus the Wisconsin Department of Natural Resources may implement landfill ban variances for specific items. Any

recyclable items which are a variance item may be excluded from the recyclables collection program.

Appliances:

Pick up and disposal of non-freon and non-capacitor appliances would be included.

Freon and capacitor appliances would be picked up at a charge to the resident of \$30.00 per appliance.

Appliances would be picked during the second week of each month only, on the resident's regular pick up day.

Tires:

Residents would be able to drop off tires at the transfer facility at the following rates:

Car tires	\$1.00 per tire
Car tires/with rims	\$10.00 per tire
Tractor tires(cut in fourths)	\$20.00 per tire

22. Superior shall be required to visually inspect the solid waste and recyclables they are collecting in order to determine compliance with this contract. Upon encountering any prohibited materials, Superior shall use a tag to inform the resident of its reason for refusing the material.

23. Superior shall collect recyclables from residential units only under this contract. The fee for such service shall be as per paragraph 17 and 19 above.

24. Ordinances and the Effective Recycling Program Report as required by the State of Wisconsin for an "Effective Recycling Program" will be the responsibility of the City. Superior will provide the City with monthly reports of weights and types of recyclables collected and solid wastes generated and landfilled from the City. The weights of solid wastes generated, landfilled from the City will be determined by truck tickets. All trucks will be weighed on a Superior furnished scale. Residential and multi-family waste will be measured separately from commercial waste. An estimate of multi-family waste volume will be provided on a quarterly basis.

25. The City will be responsible for the purchase and distribution of bins to all residents required to participate in the curbside recycling program.

26. Superior shall be responsible for providing various educational programs and/or presentations to the community upon the request of the City, the Fort Atkinson School District or charitable entities.

27. Superior and the City agree to support each other in their attempt to obtain monies from the State of Wisconsin for the support of recycling related activities (for example: grants for the purchase of recycling equipment, additional grant money to

cover the cost of shipping materials to market, support of local industries which process and/or utilize recyclable material, etc.) All equipment purchases with grant monies granted to the City of Fort Atkinson shall be the sole property of said City. Should the State of Wisconsin elect to terminate its recycling grant program in the future, the City reserves the right to terminate its duties under Section III of this contract. In such an event, the City shall notify Superior in writing thirty (30) days prior to the termination date.

28. City and Superior each recognize that County State and Federal legislation or regulation regarding solid waste recycling, collection and disposal may change during the term of this contract. If any of the recyclable items set forth in paragraph 21 above are declared toxic or hazardous waste by any political entity, Superior's obligation to collect such items shall end. Any other change in applicable law which materially affects Superior's cost of performance or ability to perform this contract shall, at Superior's or the City's option permit Superior or the City to cancel or renegotiate this contract on thirty (30) days notice to the City.

SECTION IV -- RECYCLING FACILITY

29. Superior agrees to provide a Recycling Center at 1205 Klement Street, Fort Atkinson, Wisconsin for purposes of accepting, storing, marketing and transporting salable recyclable waste as set forth in paragraph 21 herein.

30. Superior will provide, with employees of Superior, labor at the Recycling Center sufficient to carry out Superior's duties under this contract.

31. The Recycling Center will accept solid waste according to the following schedule: 9:00 a.m. to 4:00 p.m. local time, Monday through Friday, and 9:00 a.m. to 12.00 noon local time on Saturdays, except for legal holidays. Superior shall charge a reasonable fee for the disposal of solid waste delivered at the Recycling Center by citizens of Fort Atkinson.

Superior shall charge the rate of Thirty and .05 dollars (\$30.05) per ton if disposed of directly at their landfill as defined in paragraphs 38 and 39 herein for items which are ordered by Superior to be disposed of directly at their landfill. The fee for disposal at the drop-off site/transfer station will be the current rate for disposal charged the City plus a rate of \$15.00 per ton for building, equipment, and hauling costs. The rate of \$45.05 per ton will be adjusted annually per the terms of adjustment described in paragraph 19. The combined rate for disposal at the drop off site will be \$45.05 per ton through December 31, 1999. A minimum charge of \$12.00 per load will be required to cover our administrative and billing costs.

32. Superior will assist City in reasonable promotion of the recycling concept and the Recycling Center as Superior's employees are available for such promotion at Superior's option.

33. City agrees to use its best efforts to advertise and promote voluntary separation of recyclable solid waste as defined by this contract.

34. The fee payable to Superior by the City for the operation of said Recycling Center shall be contained in the unit charges as set forth in Paragraphs 17 and 19 herein.

35. Superior agrees to present a report to the City annually summarizing the amount of waste recycled through the Recycling Center under the terms of this contract.

SECTION V - DISPOSAL OF SOLID WASTE

36. Superior agrees to remove and dispose of all solid waste collected under this contract from residential, multi-family and commercial units. Such solid waste shall be disposed of in a Superior landfill or a transfer facility that is owned by Superior and located within the City limits, with final disposal at a site owned and operated by Superior Services.

37. In removing and disposing of such solid waste, Superior shall obey all local, State and Federal ordinances, laws and regulations and hold the City harmless from same.

38. Superior shall receive from the City as compensation for such services payable at the rate of Thirty and .05 dollars (\$30.05) per ton actually disposed of in conformity with this contract.

This fee shall be for the solid waste disposal of residential and multi-family units only. Superior shall bill and collect for its disposal services to commercial units directly. The rate, however, shall be the same as charged to residential units, i.e. \$30.05 per ton plus any increases as set forth in Paragraph 39. The fee for sludge disposal shall be negotiated by both parties.

39. Starting with the first anniversary date (January 1, 2000) and annually thereafter for the remainder of this contract, the fee paid to Superior by the City for its disposal services shall be adjusted. Said annual adjustments shall be of a sum equal to 50% of the preceding year's C.P.I., as defined herein. Should Superior desire a greater adjustment, it must petition the City Council for same, but in no event should an annual increase exceed nine percent (9%) of the last year's contract charge.

40. The hours that must be maintained at the dump site or transfer station shall consist of not less than eight (8) hours commencing at 8:00 a.m. to 4:00 p.m. during Monday through Friday. The hours for Saturday shall not be less than four (4) hours commencing at 8:00 a.m. The site shall be closed on Sunday and holidays as specified in Paragraph 41.

41. The sanitary landfill is not required to open or operate on New Year's Day, Good Friday, Veteran's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day or Christmas Day.

Superior shall undertake to perform all disposal services

rendered hereunder in a neat, orderly and efficient manner, to use care and diligence in the performance of this contract, and to provide neat orderly and courteous employees and personnel on its crews.

42. In accordance with recycling grants, the City is required to keep records of quantities of items that have been recycled and items that have been landfilled. Superior shall collect and tabulate this data, such as tone of individual items recycled or landfilled, number of routes, citizens complaints and comments and other information that is required by the recycling grant program and submit this information to the City in the form of a yearly report.

43. Superior shall furnish the City with truck tickets to verify the tonnage of items disposed herein. All trucks will be weighed on a Superior-furnished scale with residential and multi-family waste being weighed separately from commercial waste. Superior shall establish its routes in such a manner so as its trucks collect and dispose of garbage collected from commercial units separately from garbage collected from residential and multi-family units. The City reserves the right to monitor the truck weighing operations and to verify the scale accuracy.

44. All residential, multi-family and commercial units have the right to dump extra garbage and other solid waste items at Superior's drop-off site during normal business hours. The fees for dumping of said extra items will be the same rates as set forth

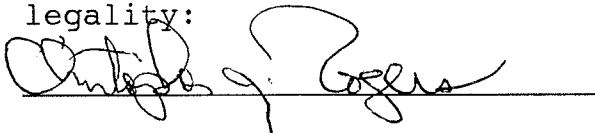
in Paragraphs 31,38 and 39 herein. Landfill access by these units will be prohibited unless expressly allowed by Superior.

45. Superior agrees to timely collect and dispose, at no additional charge to the City, all solid waste and recyclable items as defined herein from all City facilities and property including City parks. Superior shall also provide suitable containers in which such items may be placed. No cost for such containers shall be charged by Superior. A listing indicating location and container sizes should be mutually maintained.

Dated this 24 day of AUGUST, 1998

CITY OF FORT ATKINSON

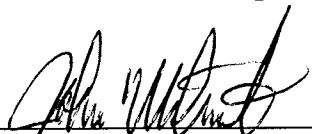
Approved as to form and
legality:



Christopher J. Rogers
City Attorney

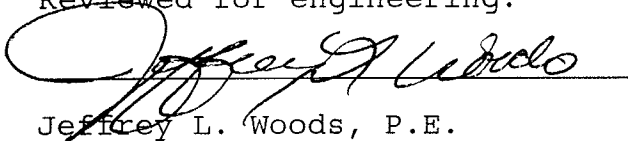
BY: 

R. C. Martin, City Manager

BY: 

John Wilmet, City Clerk

Reviewed for engineering:



Jeffrey L. Woods, P.E.

Director of Public Works

SUPERIOR SERVICES, INC.

BY: 

Leonard J. Cerrentano
General Manager

BY: _____



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Bruce Peterson, Fire Chief

RE: Review and possible action relating to an Agreement between the City of Fort Atkinson and the Fort Atkinson Firefighters - Local 580 for 2025 (Peterson, Fire Chief)

BACKGROUND

On March 13, 2024, the Fort Atkinson Firefighters requested to join the Janesville Professional Firefighters, Local 580, which is affiliated with the International Association of Firefighters. A voluntary recognition agreement was signed by the City of Fort Atkinson and Local 580 on March 22, 2024. This agreement stipulated that the first contract negotiations would begin in August 2024 and that the initial contract would cover one year, with wage adjustments limited to the annual cost-of-living adjustment scheduled for January 1, 2025.

The negotiation process began on September 16, 2024. The City was represented by Manager Houseman, City Council President Leschier, Division Chief Mike Lawrence and Fire Chief Peterson. The Local 580 was represented by full time staff from the Fort Atkinson Fire Department and the Janesville Fire Department. After six negotiation sessions, both parties reached a tentative agreement on December 1, 2024.

DISCUSSION

The proposed contract maintains the established practices of the Fort Atkinson Fire Department since its transition to a full-time fire and EMS department. Key changes and highlights include:

Paid Time Off (PTO)

- Vacation, personal, and holiday time, along with holiday bonus pay, are consolidated into a single PTO category.
- Additional pay for working holidays is eliminated.
- The contract recognizes deficiencies in the number of PTO shifts currently offered compared to industry standards in the region.

Sick Time Adjustments:

- Sick time accruals and banking have been adjusted to accommodate the unique schedules of

firefighters, as opposed to standard 40-hour workweeks.

Captain Wage Disparity:

- The contract addresses a wage disparity where Captains were earning less than some of the individuals they supervise.
- Captains will receive a \$1.00 per hour pay increase under this agreement. This adjustment is limited to the current contract and will be reevaluated during the next negotiation cycle in the fall of 2025.

Operational Control:

- The City and Department retain full authority over operations, including staffing, work rules, and departmental practices. This ensures that the City remains in control of critical decisions affecting public safety and service delivery without limitations seen in other contracts. Maintaining operational control is essential for the Department to continue meeting the needs of the community cost effectively while upholding its standards of excellence.

Union Membership Scope:

- The Local 580 represents only full-time firefighters. Part-time staff, paid-on-call personnel, chief officers, and non-sworn staff are excluded from union representation.

Recognition of Prior Employees:

- The contract includes provisions to recognize prior City employees hired as full-time Firefighters, allowing them to retain some benefit time and seniority already earned.

Job Performance Requirements and Testing:

- The contract introduces job performance requirements and testing to ensure that staff are able to perform the required job functions and demonstrate the necessary skills. It also outlines procedures for addressing performance challenges.

FINANCIAL ANALYSIS

The financial impact of the proposed contract is limited due to the prior agreement on cost-of-living adjustments only that were already planned and modest changes to PTO and Captain's wages.

Specific financial considerations include:

- The \$1.00 per hour wage adjustment for Captains will result in an additional cost of approximately \$10,000.
- The increase in PTO will require additional overtime for coverage, but this cost is partially offset by the elimination of holiday pay and a PTO buyback and deferral provision.

The proposed adjustments are expected to be within budgeted allocations for 2025 and are necessary to address both industry standards and assist with recruitment and retention of employees.

RECOMMENDATION

The contract establishes a strong foundation for both the City and the Fire Department that fairly addresses key issues, and positions the City and the Union well for future negotiations. As this is a one-year Agreement, and the City and the Union will begin negotiations again in 2025 for an expected three-year Agreement to run from 2026 through 2028.

Staff recommends that the City Council approve the proposed Agreement between the City of Fort Atkinson and Fort Atkinson Firefighters Local 580, subject to ratification of the contract in its entirety by the Fort Atkinson Firefighters Local 580.

ATTACHMENTS

1. 3.13.24 IAFF Local 580 Letter
2. Signed IAFF Local 580 Voluntary Recognition 3.22.24
3. CoFA & Local 580 Agreement Final - Unsigned



Janesville Fire Fighters IAFF Local 580



March 13, 2024

City Manager Rebecca Houseman
City of Fort Atkinson
101 North Main Street
Fort Atkinson, Wisconsin 53538

RECEIVED

MAR 13 2024

CITY OF FORT ATKINSON
CITY MANAGER

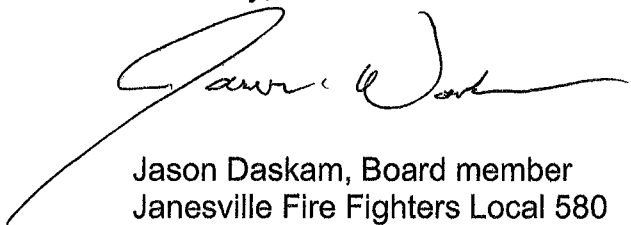
Dear City Manager Rebecca Houseman:

I write to inform you that the full-time members of the Fort Atkinson Fire and EMS Department have voluntarily elected to join the Janesville Professional Fire Fighter's, Local 580, and affiliate with the International Association of Fire Fighters (IAFF), AFL-CIO, CLC. Additionally, we have secured the signatures from twelve of the twelve full-time Fort Atkinson Fire and EMS employees are interested in being represented by Local 580. For this reason, I respectfully request that the City of Fort Atkinson voluntarily recognize the Janesville Fire Fighters, IAFF Local 580, AFL-CIO, CLC the sole and exclusive representative of the full-time Fort Atkinson Fire Fighters. We believe that this process can be a smooth transition, and a memorandum of understanding recognizing this relationship can be easily executed.

I am looking forward to a positive and strong relationship with the City of Fort Atkinson as we make this transition. We would gladly craft the memorandum of understanding that will reflect the new Local and send it to you for review and comment. Voluntary recognition of this request would be greatly appreciated, and it will send the clear message that we are working together from the start.

I can be reached at (608) 289-0462 or jzdaskam@Gmail.com for any reason. Thank you for your time and consideration.

Sincerely,



Jason Daskam, Board member
Janesville Fire Fighters Local 580



City of Fort Atkinson
City Manager's Office
101 N. Main Street
Fort Atkinson, WI 53538

Sent via email to jzdaskam@gmail.com

March 21, 2024

Mr. Jason Daskam
Janesville Fire Fighters Local 580
303 Milton Avenue
Janesville, WI 53545

RE: Request for Voluntary Recognition of Fort Atkinson Fire Union - AMENDED

Dear Mr. Daskam:

Thank you for meeting with Fire/EMS Chief Bruce Peterson, Police Chief Adrian Bump, and I on March 13th relating to the Fort Atkinson full time firefighters' request for voluntary recognition of their intent to be represented by IAFF Local 580. This letter contains amendments from the original letter dated March 20th based on conversations within the Fort Atkinson Fire/EMS Department.

On behalf of the City of Fort Atkinson, I offer the following timeline for organization and representation:

- **March 20, 2024** – Voluntary Recognition of Request for Unionization by the City.
- **August through November 2024** – Negotiation of 1+ year contract without wage adjustments beyond those already planned through annual cost of living adjustments and step increases with the following exception: the City and the union representatives agree to consider a wage adjustment for the Captain position, based on an approved job description. This contract will go into effect upon ratification and terminate on December 31, 2025.
- **August through November 2025** – Negotiation of regular 3-year contract with IAFF 580 (2026-2028).

I understand that this may not be the timeline you had intended; however, please find the reasoning below, which may influence your outlook:

1. As of the date of this letter, Fire/EMS Chief Bruce Peterson has been on the job for two weeks.
2. Job Descriptions for all of the full-time positions, specifically the Captains, do not currently exist and need to be written to support any differentiation in the current pay plan.
3. Standard Operating Procedures and Policies have yet to be fully developed. Starting negotiation without these in place may be frustrating and time-consuming.
4. The one-year contract for 2025 and the intent to renegotiate for 2026-2028 will allow the Fire Union to be on the same contract cycle as the Police Union, benefiting both Unions as well as offering efficiencies for the City.
5. The current separate Fire and EMS contracts with the Towns of Koshkonong, Jefferson, Hebron, Oakland, and Sumner will be renegotiated in 2025 and effective in 2026. These contracts may provide an additional source of revenue for the City, which would benefit the Union's efforts.

6. Due to the passage of the 2022 Public Safety Referendum, the City lost about \$180,000 in revenue from the State through the Expenditure Restraint Program for the budget year 2024.
7. Due to the language included in 2023 WI Act 12, the City remains outside of the Expenditure Restraint Program for 2025 but is expected to rejoin in 2026 (based on the difference in general fund expenditures from 2024 to 2025).

As I am sure the Fire/EMS employees are aware, the City is growing very slowly. Any increases in the property taxes are tied to the City's net new construction percentage, which has been less than 0.5% for the past three years. This is evidenced by the fact that the City had to request additional funds from taxpayers through the referendum process in order to hire full-time staff in the Fire/EMS Department in the first place.

All full-time Fire/EMS Department members are scheduled to receive a 5% step wage increase in June 2024; and the AEMT/Firefighters are scheduled to receive a 5% step wage increase at 36 months of employment in December 2025.

There are planned wage increases for all non-represented employees in 2025 as part of the budget process. Staff does not know what will be proposed and what will be approved by the Council through the budget process at this time; however, it is likely there will be an increase.

The City is not in the position to provide additional wage increases until the City is able to re-enter the Expenditure Restraint Program and renegotiate the service contracts with the surrounding towns, which will all be effective in 2026. This reasonable and measured approach will assist in reinforcing the strong and positive relationship between the City of Fort Atkinson and IAFF Local 580.

I appreciate your consideration of this proposal. Please contact me at (920) 397-9901 if you have any questions or need additional information. If the terms are acceptable to you, please sign, scan, and email back to me at rhuseman@fortatkinsonwi.gov.

Sincerely,

Rebecca Houseman

Rebecca Houseman
City Manager, City of Fort Atkinson

Acceptance of organizational timeline:

Jason Daskam Date: 3/21/2024
Jason Daskam, on behalf of FAFD

Voluntary Recognition of Request for Unionization and acceptance of timeline:

Rebecca Houseman Date: 3/22/2024
Rebecca Houseman, City Manager

Agreement

Between

City of Fort Atkinson

And

Fort Atkinson Firefighters - Local 580

Effective Date: January 1, 2025

Expiration Date: December 31, 2025

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Article I - Recognition

Section 1.01: This written agreement shall be entered into by and between City of Fort Atkinson hereinafter referred to as the “Employer” or the “Department” and the Firefighters Local 580, hereinafter referred to as the “Association,” for and on behalf of its affiliate local. The Employer recognizes the Association as the sole and exclusive bargaining agent for all regular full-time professional employees classified as public safety employees under Wis. Stat. § 111.70(1)(mm)1. a., whose primary function is firefighting and/or emergency medical services, and excluding permanent part-time, non-sworn fire prevention staff, confidential employees, chief officers, and all other employees and volunteers, as their representative.

Section 1.02: A reference to “Employee” in this Agreement shall mean a full-time member of the Association.

Article II - Management Rights

Section 2.01: The City retains all rights of possession, care, control and management that it has by law, and retains the right to exercise the functions under the terms of the collective bargaining agreement. The City possesses the sole right to operate the City and Fire Department and all management rights repose in it. The powers or authority which the City has not specifically abridged, delegated or modified by other provisions of this agreement are retained as the exclusive prerogatives of the City. These rights include, but are not limited to, the following:

- A. To direct all operations of the City and Fire Department;
- B. To appoint or hire the Fire Chief or any other employees;
- C. To establish and require observance of schedules of work and work rules;
- D. To place staff or others in positions of authority regarding the conduct of City business and operations;
- E. To determine the methods, means and personnel by which operations are to be conducted;
- F. To hire, promote, transfer, schedule and assign (including overtime assignments) employees in positions within the Department;
- G. To create, revise and eliminate existing positions, duties, qualifications and organizational structures, operations or work practices;

- H. To suspend, demote, discharge and take other disciplinary action against employees;
- I. To relieve employees from their duties;
- J. To maintain efficiency of operations;
- K. To take whatever action is necessary to comply with state or federal law;
- L. To introduce new or improved methods or facilities;
- M. To change existing methods or facilities;
- N. To take whatever action is necessary to carry out the functions of the City in situations of emergency;
- O. To select employees, assign employees, establish quality standards and evaluate employee performance;
- P. To contract out for goods or services;
- Q. To determine the kinds and amounts of services to be performed as pertains to operations as well as the number and kind of classifications to perform such services;
- R. To determine the financial policies of the City.

Section 2.02: The exercise by the City of any of the foregoing powers, rights and/or authority shall not be reviewable by an arbitrator except in case such as so exercised as to violate an express provision of this Agreement.

Article III – No Strike

Section 3.01: The Association agrees not to engage in or condone any illegal job action.

- A. **Strike Prohibited:** The term “Strike” as used herein shall be interpreted broadly for the protection of the City to include the failure with others to report for duty, any concerted absence, any concerted stoppage of work, any concerted slow-down, sit-down, sick-out, refusal to work, work interruption, work stoppage, call-in, or failure in whole or in part to carry out the full, faithful and proper performance of the duties of employment, and without the lawful approval of the superior. The term “Strike” as used herein, also means in any manner interfering with the operation of the City for the purpose of inducing, influencing, or coercing, the recognition of any employee organization or a change in the

conditions or compensations or the rights, privileges, or obligations of employment or in sympathy with others for any purpose. All orders will be obeyed.

- B. Neither the Association or any of its officers, agents or these employees will instigate, promote, encourage, sponsor, engage in or condone any strike, concerted work stoppage, sympathy strike, any other intentional interruption of work slowdown, or picketing, except for informational picketing, during the term of this Agreement and until a successor Agreement is ratified by both parties.

Section 3.02: The Association, its representatives and individual employees will not authorize, assist or support any strike, work stoppage, slowdown or other activity that interferes with or interrupts the operations of the City. In the event of any such activity, the City shall immediately notify the Association thereof, and the Association shall immediately give public notice to the employees involved that they are in violation of this Agreement and should end such strike, work stoppage or other conduct which is interrupting or impeding work. In the event that a strike or other violation not authorized by the Association occurs, the Association agrees to take all reasonably effective and affirmative action to secure the member's return to work as promptly as possible. The Association confirms its belief that participation in a strike constitutes grounds for the employee's removal from employment.

Section 3.03: There shall be no lock-out by the City during the term of this Agreement.

Section 3.04: Any employee violating this Article shall be subject to disciplinary action, up to and including discharge. In any prohibited practice, legal, or any arbitration proceeding involving a violation of this provision, the sole question for the judge, hearing examiner, or arbitrator to determine is whether the employee engaged in the prohibited activity. This provision shall not limit the City's rights to seek other available legal remedies.

Article IV – Amendments and Savings Clause

Section 4.01: This Agreement may not be amended except by the mutual consent of the parties in writing.

Section 4.02: If any section of this Agreement or any addenda thereto as it relates to matters under the exclusive control of the City should be held invalid by operation of law or by any tribunal of competent jurisdiction, or if compliance with or enforcement of any section should be restrained by such tribunal, the remainder of this Agreement and addenda shall not be affected thereby, and the parties shall enter into immediate collective bargaining negotiations for the purpose of arriving at a mutually satisfactory replacement for such section.

Article V – Conditions of Agreement

Section 5.01: The terms and provisions herein contained constitutes the only and entire Agreement between the parties and supersedes all previous communications, representations, or agreements, either verbal or written, between the parties hereto.

Section 5.02: The parties acknowledge that during the negotiations which resulted in this Agreement each had the unlimited right and opportunity to make requests and proposals with respect to any subject or matter not removed by law from the area of collective bargaining and that the understandings and agreements arrived at by the parties after the exercise of that right and opportunity are set forth in this Agreement. Therefore, the Employer and the Association, for the life of this Agreement, each voluntarily and unqualifiedly waives its right, and each agrees that the other shall not be obligated to bargain collectively with respect to any subject or matter whether or not specifically referred to or covered by this Agreement, even though the subject may or may not have been within the knowledge or contemplation of either or both of the parties at the time the parties negotiated or signed this Agreement.

Section 5.03: Any mutual agreements or understandings which are reached during the term of this Agreement shall be reduced to writing. Mutual waivers of any breach, term or condition of this Agreement by the parties shall not constitute a precedent in the future enforcement of all its terms and conditions.

Section 5.04: Nothing contained in this Article shall preclude the parties entering into negotiations regarding contract provisions to become effective after the expiration date of this Agreement.

Article VI - Employee Classifications

Section 6.01 Regular Full-time Employee: A regular full-time firefighter is an employee who is designated by the City as a regular full-time employee and who is appointed by the Fire Chief under Wis. Stat. 62.13(4) and approved by the City of Fort Atkinson Police & Fire Commission. Only regular full-time firefighters are covered under and subject to the terms of this Agreement.

Section 6.02 Classifications: The City shall set classifications, which may include, for example, employees classified as “Shift Personnel” working a rotating platoon system, “Staff Personnel” working a regular full-time workweek, or other classifications. Members assigned to a full-time workweek shall remain at the same annual salary if assigned to, for example, a rotating platoon system, but have their hourly pay and sick time accrual adjusted to reflect the new schedule so as not to reflect a detriment to the City or a benefit to the employee.

Section 6.03 Probation: Employees shall be required to serve a twelve (12) month probationary period. The Fire Chief may extend the probationary period for up to six (6) months. During the term of the probationary period, the employee may be disciplined or discharged for any lawful reason or no reason, and without recourse to the grievance procedure, the Police & Fire Commission, or in any other forum or process between the parties or as provided by the City.

Article VII - Other Department Rules, Regulations and Practices

Section 7.01: The rules, regulations and practices as published by the Department shall be followed by the employees to the extent they do not conflict with any specific provision of this Agreement or violate any state or federal law. Such rules, regulations and practices shall be subject to amendment by the City in the City’s discretion.

Article VIII - Grievance Procedure

Section 8.01 Definition of Grievance: A grievance shall be defined as a dispute concerning the interpretation, application, or enforcement of the express terms of this Agreement. This Article shall not apply to discipline matters. Only the Association may be a grievant.

Section 8.02 Subject Matter: Only one (1) subject matter shall be covered in any one (1) grievance. A written grievance shall contain the name and position of the employee(s) affected by the grievance, a statement of the grievance, the issue involved, the relief sought, the date the incident or violation occurred, the article(s) and section(s) of the Agreement alleged to have been violated, the signature of the Association representative and the date.

Section 8.03 Time Limitations: Any grievance not complying to the time limits set forth in this Article shall be null and void. Time limits are exclusive of Saturdays, Sundays, and holidays. Time limits may be extended by mutual agreement in writing.

Section 8.04 Procedural Steps: Grievances shall follow the steps below. However, by mutual agreement, in writing, the parties may bypass any of the following steps.

- A. Step 1: The grievance shall be presented in writing to the Fire Chief within ten (10) business days of the date the affected employee knew or should have known of the event giving rise to the grievance. The Association shall be responsible for identifying the issue as a grievance. The Fire Chief shall inform the grievant(s) of the decision in writing within ten (10) business days of the date the grievance was presented.
- B. Step 2: If the grievance is not resolved in Step 1, the grievance shall be submitted by the Association to the City Manager within ten (10) business days of the Fire Chief's responses. The City Manager may choose to hold a meeting with the Association representative and affected employees. A written decision on the grievance shall be issued to the grievant(s) within ten (10) business days of the City Manager's decision.
- C. Step 3: If the grievance is not resolved in Step 2, the Association may request, within ten (10) business days of the date of that decision, that the grievance be submitted to an arbitrator by submitting a letter to the Wisconsin Employment Relations Commission with a copy of the letter to the City Manager and Fire Chief.

Section 8.05 Arbitration: The Wisconsin Employment Relations Commission shall submit a panel of up to five (5) WERC staff arbitrators and commissioners to the parties. The parties shall, within ten (10) business days of the receipt of said list, select the arbitrator by alternately striking names from the list until one (1) name remains with the Association striking first. Such person shall then be the designated arbitrator. Any fees incurred for the Arbitrator shall be shared equally between the parties.

Section 8.06 Hearing: The arbitrator so elected shall hold a hearing at a time and place convenient to the parties within fifteen (15) business days of notification of their selection, unless otherwise mutually agreed upon by the parties. The arbitrator shall take such evidence as in their judgment is appropriate for the disposition of the dispute. A statement of position may be made by the parties and witnesses may be called.

Section 8.07 Arbitrability: The arbitrator shall have initial authority to determine whether or not the dispute is arbitrable. Once it is determined that the dispute is arbitrable, the arbitrator shall proceed in accordance with this Article to determine the merits of the dispute submitted to arbitration, and the Arbitrator's decision shall be final and binding upon all parties.

Section 8.08 Decision of the Arbitrator: The decision of the arbitrator shall be in writing to the City and the Association. The decision of the arbitrator shall be limited to the subject matter of the grievance and shall be restricted solely to interpretation of the contract provision allegedly breached. The arbitrator shall not modify, add to or delete from the express terms of the Agreement. The arbitrator shall have no authority to impose liability on the City for events arising before the effective date of the initial contract. The arbitrator shall have no power to and shall neither add to, detract from, nor modify the language of this Agreement in arriving at a determination of any issue presented that is proper for final and binding arbitration. The arbitrator shall have no authority to grant wage increases. In any arbitration award, no right of management shall in any manner be taken away from the Employer, nor shall such right be limited or modified in any respect excepting only to the extent that this Agreement clearly and explicitly expresses an intent and agreement to divest the Employer of such right.

Section 8.09 Arbitration Costs: Both parties shall share equally the costs and expenses of the arbitration proceedings, including the fees of the arbitrator. Each party, however, shall bear its own costs for witnesses, and all other out-of-pocket expenses, including possible attorney's fees. The party requesting a transcript shall pay the cost to produce such transcript. In the event the other party or the arbitrator wishes a copy, the costs of the transcriptions will be divided equally between the parties.

Article IX - Seniority

Section 9.01 Definition: Seniority shall be determined from the last date of hire as regular full-time employee. If more than one employee is hired on the same date, seniority among such employees shall be determined by the eligibility list at the time of hire. Time spent on approved paid leaves of absence shall be included when determining seniority. Unpaid leaves shall not count toward seniority and shall result in proration of paid leave accruals.

Section 9.02 List of Employees: The City shall submit to the Association a list of regular full-time employees in the Department arranged in order of their seniority and a Seniority List of each rank based on time in rank. Said lists shall be submitted to the Association and the Association shall have ten (10) business days to check for its accuracy. If the Association does not object to its accuracy within said ten (10) business days, the seniority lists shall be deemed accurate. The lists shall be kept current and posted in a conspicuous place at the Fire Station(s) for a reasonable period of time.

Section 9.03 Seniority Retention for Prior Full-Time City Employees: A member hired as a full-time employee of the Fort Atkinson Fire Department who was previously employed as a full-time City of Fort Atkinson employee shall retain their accrued seniority for the purpose of Paid Time Off (PTO) accrual rates. This means the member's seniority, as it applies to PTO eligibility and accrual, will reflect their total tenure as a full-time City of Fort Atkinson employee, inclusive of time served in other city departments. In addition, the previously employed member's accrued sick time hours shall be transferred to their new position.

This seniority transfer does not extend to departmental seniority rankings within the Fort Atkinson Fire Department. It does not affect seniority-based considerations such as mandatory shift assignments, time-in-rank lists, or any department-specific seniority practices related to scheduling, promotion, or other operational protocols.

Section 9.04 Loss of Seniority: Seniority and the employment relationship shall be broken and terminated (via resignation if not otherwise specifically designated below) if an employee:

- A. resigns;
- B. is discharged;

- C. is absent from work for two (2) consecutive workdays without notification to the Department without any unforeseen circumstances;
- D. fails to report to work within fourteen (14) calendar days after having been recalled from layoff;
- E. fails to report for work at the termination of an authorized leave of absence;
- F. accepts other employment without permission while on authorized leave of absence;
- G. works for another employer without permission while on authorized leave of absence;
- H. retires.

Section 9.05 Layoffs: The City and the Association recognize the need to sustain essential department operations, including the Fire Service, Fire Prevention Bureau, and Emergency Medical Services. Layoffs will be determined by the Fire Chief, who retains the authority to make such decisions based on the requirements necessary to maintain effective departmental operations and services. Layoff determinations will prioritize operational needs across all service divisions, with considerations of certifications, roles, and service demands in the department.

In the event that layoffs are required, any full-time EMT designated for layoff may be granted a period of time to obtain paramedic certification to retain their position. This provision applies only if the layoff is not emergent with time limitations, as determined by the City, and if the EMT's successful certification as a paramedic would fulfill the staffing and operational needs of the Fort Atkinson Fire Department.

The City employs a group of part-time firefighters whose roles are distinctly separate from those of full-time or permanent part-time employees. This group of traditional part-time firefighters, who primarily respond to emergencies as needed, shall not be subject to layoffs and will not be considered when determining layoffs among full-time personnel.

Any employee designated as "permanent part-time" and acting in a capacity to provide ongoing full-time support, rather than intermittent emergency response, shall be subject to layoff before any full-time member. Permanent part-time employees will be evaluated on a case-by-case basis, at the Fire Chief's discretion, to determine the necessity of their roles in sustaining critical department operations.

Section 9.06: The Fire Chief has the authority under Article II - Management Rights, to assign personnel by exercising reasonable discretion in lieu of an employee's individual preference [as](#) and regardless of seniority.

Article X - Outside Employment

Section 10.01: All employees shall be expected to place the responsibilities and obligation of their position with the City first and shall be permitted to engage in outside, non-City work pursuant to the Department policy created by the Fire Chief, which shall be consistent with the policy of the City of Fort Atkinson Personnel Manual.

Article XI - Resignation

Section 11.01 Notification: Unless waived by the City Manager, employees planning to voluntarily terminate their employment with the City are to notify the Fire Chief as far in advance as possible, but not less than two (2) weeks prior to their last day on the job. Paid leave may not be taken as part of a required two-week termination notice, unless otherwise approved in writing by the Fire Chief.

Section 11.02: Terminating employees must turn in all keys and other Department property in their possession to the Fire Chief or other designated personnel as directed. Failure to return Department property and issued materials and equipment by the final day of employment will result in the forfeiture of accumulated paid leave subject to payout at separation.

Article XII - Wages

Section 12.01: Employees shall be paid according to the normal payroll practices of the City.

Section 12.02 Captains Wages: The City agrees to an additional \$1.00 per hour stipend for each of the three full-time Captains. This stipend recognizes the additional responsibility for the Captain position. This stipend shall only be in effect until the next negotiated wage adjustment, at which point the stipend will not be offered.

Article XIII - Hours of Work

Section 13.01 Hours: The scheduled work hours for all employees shall be set by the Fire Chief. The Fire Chief may transfer employees to different work shifts. An employee may be required to attend training outside the employee's scheduled shift. For overtime calculation purposes, the City shall set the work period of up to 28 days.

Section 13.02 FLSA Compensation: The City agrees to compensate each employee working a regular platoon system (i.e. 24/48 or 48/96 schedule) with three (3) hours of overtime pay per fourteen (14) day pay period in recognition of hours worked in excess of the 212 hours maximum per 28-day work cycle. Employees working a normal forty (40) hour workweek are not eligible for the extra pay.

Section 13.03 Overtime: Eligible employees shall be compensated at the rate of time and one-half (1 ½) for authorized hours worked in excess of their normally scheduled workday.

- A. Emergency call back will be paid at a minimum of one (1) hour and then paid to the quarter hour (15 minutes) after the first hour.
- B. Continuation of duty will be calculated to the nearest quarter hour (15 minutes).
- C. All off duty training and extra duty assignments will be paid at time and one half (1 ½) to the nearest quarter hour (15 minutes).

Section 13.04 Compensatory Time: Regular, full-time employees are not eligible to receive compensatory time off (Comp Time) in lieu of overtime compensation under the Department's current staffing level.

Section 13.05 Shift Trades: A shift trade is defined as "time when one member voluntarily works for another by their mutual agreement." The City of Fort Atkinson does not assume any responsibility for compensating a member who agrees to work for another nor shall the hours worked by a member be used to determine payments for overtime or other benefits.

Once approved by management, the member who has agreed to work for the normally assigned shift member assumes responsibility for ensuring that their position is filled and may be subject to discipline or docking of equal Paid Time Off hours equal to overtime paid should the shift go unfilled.

The Fire Chief shall create a policy which defines the proper method of notification of shift trades, limitations and approval by the Fire Chief or their designee. The Fire Chief may deny shift trades based on operational needs or staffing limitations.

Probationary firefighters may not work shift trades until expressly approved by the Fire Chief based on their probationary training status.

Article XIV - Insurance

Section 14.01: All eligible employees will be offered health and dental insurance through the Department of Employee Trust Funds. The City will pay 88% of the lowest cost plan premium, with the employee paying the balance. Eligible employees married to each other will be offered either two single plans, or one family plan.

The City may offer additional insurance plans, such as but not limited to Life Insurance, Accident Insurance, Vision Insurance, Income Continuation Insurance and Flexible Spending Account. The eligible employee will pay 100% cost of the premium of any additional insurance coverage they may choose to take part in.

Article XV - Contributions to the Wisconsin Retirement System

Section 15.01: An eligible employee shall pay the full amount of the employee's contribution as required by the Wisconsin Retirement System.

Article XVI - Uniform Allowance

Section 16.01: The City determines the appropriate uniform for the Department and may update the uniform policy as deemed necessary.

A. The City shall provide each employee with a uniform allowance of \$350 per year.

Unused allowance may roll over into the next year with a maximum uniform bank of 3 years' worth of uniform allowance.

- B. The City will purchase the initial base uniform for new employees as determined by the Fire Chief. New employees will become eligible for the \$350 per year uniform allowance starting at the next January 1st after their initial employment.
- C. Unused portions of the uniform allowance are forfeited upon termination of employment.
- D. The uniform allowance is to be used for only approved items from the uniform policy. All employees are required to have the uniform in proper condition at all times and replace items as necessary.
- E. The City shall monitor purchases and deny reimbursement for excessive purchases of unauthorized or non-essential items and within 6-months of resignation or retirement. The City may deduct already reimbursed payments from final paycheck.

Article XVII - Paid Leave and Unpaid Leave

Section 17.01: All paid leave shall be considered as “Paid Time Off” (PTO) with the exception of sick time. This includes holiday pay, vacation pay and personal time which were combined and recognized in the PTO schedule below.

Section 17.02: The Department shall determine the method of PTO selection and may limit the number of employees and that can be on PTO for each shift.

Section 17.03 Paid Time Off (PTO): Employees working platoon system shall earn Paid Time Off (PTO) based on years worked; (New employee’s PTO will be pro-rated based on start date)

Step 1: 288 hours (12 shifts) 1st year through 5th year

Step 2: 336 hours (14 shifts) during the 6th year through 13th year

Step 3: 384 hours (16 shifts) during the 14th year through 24th year

Step 4: 456 hours (19 shifts) during the 25th year and thereafter

Section 17.04 PTO Pay Out and Carry Over: Employees have the option each year to a PTO buyback and/or PTO carryover into the next calendar year. The Fire Chief has the authority to approve or deny the PTO carryover and/or PTO buyback request based on operational needs. This benefit shall remain in effect only under the Department’s current staffing level.

- A. PTO buybacks are limited to 6 shifts (144 hours) and must be requested to the Fire Chief by October 31st of the current calendar year. The PTO buyback payout will be remitted on the last scheduled paycheck of the current calendar year.
- B. Employees also have the option to carryover unused PTO time into the next calendar year. The PTO carryover must be requested to the Fire Chief by October 31st of the current calendar year and is limited to only the number of PTO hours earned in that calendar year less any PTO buyback hours.

Section 17.05 Sick Time: Employees may earn sick time at a rate of 8 hours per two-week pay period worked or paid and each employee may accumulate up to 1,440 hours of sick leave.

- A. When employees are assigned to a 40-hour workweek, the sick time accrual rate changes to 4 hours per two-week pay period.
- B. Employees shall notify the On-Duty Shift Commander as soon as possible of the need for sick time leave and no later than 2 hours prior to the beginning of their scheduled shift. An employee who fails to provide timely notice shall be subject to discipline.
- C. Sick leave shall only be used when the employee is too ill or too injured to perform his or her work duties.
- D. The Department shall monitor the use of sick time by employees for misuse with special attention given to excessive or suspicious sick leave use, weekend and holiday use and abutting an employee's scheduled time off. Misuse of sick leave constitutes theft and untruthfulness, and the employee should expect to be terminated from employment for such offense.
- E. An employee covering a duty trade may not use their sick leave in lieu of working the approved trade. If the employee working a duty trade is unable to work due to illness or injury, they shall be required to use one and a half times (1 ½) the sick leave to compensate for the required overtime needed to cover their approved shift trade.
- F. The City may require an employee to supply the City with a fitness for duty examination, a doctor's note or other documentation when deemed necessary by the Fire Chief.

Article XVIII – Certifications and Job Performance

Section 18.01: All employees are required to maintain EMT-Advanced license or medical license. All employees hired after 1/1/2024 shall be required to obtain and maintain a paramedic license, except with authorization of the Fire Chief.

Section 18.02: Based on the needs of the City, the Fire Chief may require specified employees to obtain other advanced certifications, including but not be limited to, paramedic certification, fire inspector, training officer, and specialty rescue certifications.

Section 18.03: Employees are required to obtain and maintain other professional certifications as deemed necessary by the Fire Chief. This may include but not limited to Motor Pump Operator, Firefighter II, Fire Officer I and Fire Officer II.

Section 18.04 Job Performance: The City may require a regular Job Performance evaluation of each employee to demonstrate competency and physical ability to perform essential job functions. This may include, but is not limited to, Driver/Operator testing, physical agility course, and other regular evaluations as deemed necessary.

Article XIX - Duration/Bargaining Procedure

Section 19.01: This agreement shall become effective as of January 1, 2025 and shall remain in full force and effect to and including December 31, 2025. In the event a new agreement is desired to take affect after the termination of this agreement, the party desiring to bargain a successor agreement shall give written notice of its desire to commence negotiations on or before July 1st of the year in which the agreement expires. Thereafter, the parties shall mutually agree to a date to exchange proposals and commence bargaining. In the event a party desiring to bargain a successor agreement fails to notify the other party by July 1st of the year in which the agreement expires, this agreement shall automatically renew for a successive twelve (12) month period.

Signed this ____ day of _____, 20____.

For the City of Fort Atkinson

Signature

Name

Title

Signature

Name

Title

For Local 580

Signature

Name

Title

Signature

Name

Title

Addendum I – Definitions

For the purposes of this agreement the following terms and definitions shall be used to provide clarity on contract language.

Shift: A "Shift" is defined as the consecutive hours that a firefighter is scheduled to work. This typically includes a 24-hour period beginning at 08:00 AM and ending at 08:00 AM the next morning, subject to the department's operational needs and established schedule.

Tour: A "Tour", also known as a "Work Period" refers to a complete cycle of shift(s) the employee is scheduled as per the department's operational schedule. For example, it may consist of two (2) consecutive 48-hour shifts when the department is 48 hours on duty / 96 hours off duty or one (1) 24-hour shift when the department is on 24 hours on duty / 48 hours off duty.

Hours: "Hours" refer to the actual time an employee is scheduled to work, have worked or is scheduled off by an employee. This may include regular shifts, overtime, and any additional hours worked beyond the standard schedule.

PTO (Paid Time Off): "PTO" encompasses all forms of paid leave, including vacation, personal days, holidays, and other approved time off not including sick leave.

Shift Personnel: Staff working a regular rotating platoon system, generally an extended shift on duty followed by extended off duty period such as but not limited to 24 hours on duty/48 hours off duty or 48 hours on duty/96 hours off duty.

Staff Personnel: Staff working a regular full-time workweek, generally 40 hours per week scheduled during normal business hours.



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Adrian Bump, Police Chief

RE: Review and possible action relating to Police Department equipment and upfitting order for 2025 squad car purchase (Bump, Police Chief)

BACKGROUND

At the meeting on December 3rd, the City Council authorized the purchase of two police vehicles from Griffin Ford for a total of \$90,989.52. These vehicles are scheduled to arrive in 2025. Funds were established in the 2025 Budget under the Police Outlay Account in the amount of \$138,000.00 to cover the purchase of the two squads and the equipment, graphics and upfitting required for final set up.

DISCUSSION

In the past, staff has included the upfitting and squad specific equipment purchase approvals at the same time as the squad car purchase. In 2025 staff will transition older body style squads resulting in non-compliant equipment that will not fit in a new model squad car. This means the purchase requirements for the two new squads are higher and the purchases meet the threshold of a separate approval.

Our agency uses 10-33 Vehicle Services for all squad upfitting needs. The company can complete all upfitting needs and can purchase all the equipment specific to the department's cars directly from the various vendors at Wisconsin/Government pricing.

Prices are scheduled to increase on multiple pieces of equipment through these different vendors on January 1, 2025.

FINANCIAL ANALYSIS

The proposals to upfit the 2025 squads from 10-33 Vehicle Services are included with this memorandum for review. The proposals total \$41,992.42 and represent all of the equipment needed to put the 2025 squads into service, including labor.

Ford Interceptor SUV 1: **\$20,996.21** Ford Interceptor SUV 2: **\$20,996.21**

Total: \$41,992.42

The total amount authorized for the purchase and outfitting of two squads was \$138,000 in the 2025 CIP. The squad purchase was \$90,989.52, and the equipment and labor for the unfitting is \$41,992.42. The balance is \$5,018.06, which will likely be just enough to pay for the exterior graphics on the squads prior to entering the fleet.

RECOMMENDATION

Staff recommends the City Council approve the pre-order through 10-33 Vehicle Services for the squad car equipment and labor for two vehicles for a total of \$41,992.42. This order will lock in 2024 prices on equipment and allow the department to complete the entire squad transition process with the budgeted funds with the understanding that no purchases, equipment acquisition, or spending will occur until after January 2, 2025. Total Funds used from the Outlay Account for the Squad and equipment will not exceed the \$138,000 budget set in the 2025 CIP.

ATTACHMENTS

1. 2525
2. 2524



10-33 Vehicle Services, LLC

N4615 Indian Point Rd.

Sullivan, WI 53178

Phone: (262) 490-3109

Email: 10-33@charter.net

Estimate

Date	Estimate #
11/8/2024	2525

Customer:

Fort Atkinson Police Department
101 S Water St.
Fort Atkinson, WI 53538

Item	Description	Qty	Rate	Total
SET UP UTILITY STRIP	2025 UTILITY #2 SET UP FORD POLICE INTERCEPTOR UTILITY REMOVE OLD EQUIPMENT FROM OLD SQUAD	40.00 6.00	125.50 125.50	5,020.00 753.00
EB2DEDE	WHELEN LEGACY DUO WECAN X, CUSTOM CONFIGURATION	1.00	2,241.35	2,241.35
MKAJ105	WHELEN LIGHTBAR MOUNT KIT, 2020 UTILITY	1.00	0.00	0.00
C399	WHELEN CENCOM CORE AMPLIFIER CONTROL MODULE	1.00	1,063.75	1,063.75
CCTL7	WHELEN CORE 21 BUTTON CONTROL HEAD	1.00	0.00	0.00
C399K7	WHELEN CORE CANPORT INTERFACE, 2021 F150	1.00	0.00	0.00
SA315P	WHELEN COMPOSITE SIREN SPEAKER	1.00	0.00	0.00
SAK66D	WHELEN SA315P SIREN SPEAKER MOUNT, 2020 UTILITY (DRIVER SIDE)	1.00	0.00	0.00
CCTL5	WHELEN CENCOM CORE HANDHELD CONTROL HEAD	1.00	268.30	268.30
CAT6	CAT 6 CABLE	1.00	15.95	15.95
CAT6 COUPLER	CAT 6 COUPLER	1.00	5.99	5.99
CAT6 SPLIT	CAT6 2 WAY SPLITTER	1.00	15.68	15.68
CLBV2V	WHELEN VEHICLE TO VEHICLE SYNC, LIGHTBAR MOUNTED	1.00	195.50	195.50
CEM16	WHELEN WECAN X EXPANSION MODULE, 16 OUTPUT 4 INPUT	2.00	165.73	331.46
SA-1033-TLF-FPI...	CUSTOM UTILITY TAIL LIGHT FLASHER HARNESS	2.00	66.50	133.00
I2D	WHELEN ION DUO RED/WHITE (SIDE WINDOW)	1.00	116.48	116.48
I2E	WHELEN ION DUO BLUE/WHITE (SIDE WINDOW)	1.00	116.48	116.48
60CREGCS	WHELEN 6" ROUND LED INTERIOR LIGHT RED/WHITE	1.00	151.19	151.19
I2D	WHELEN ION DUO RED/WHITE (LICENSE PLATE)	1.00	116.48	116.48
I2E	WHELEN ION DUO BLUE/WHITE (LICENSE PLATE)	1.00	116.48	116.48
TLI2K	WHELEN ION T-SERIES DUO, RED/AMBER	1.00	113.00	113.00
TLI2M	WHELEN ION T-SERIES DUO, BLUE/AMBER	1.00	113.00	113.00
PSD02FCR	WHELEN STRIP LIGHT PLUS DUO RED/WHITE	1.00	123.43	123.43
Thank you for allowing us to bid on your vehicle and equipment needs. This estimate is valid for 7 days. Special ordered equipment will be invoiced upon order placement.		Subtotal		
		Sales Tax (0.0%)		
		Total		



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Sullivan, WI 53178

Phone: (262) 490-3109

Email: 10-33@charter.net

Estimate

Date	Estimate #
11/8/2024	2525

Customer:

Fort Atkinson Police Department

101 S Water St.

Fort Atkinson, WI 53538

Item	Description	Qty	Rate	Total
SHIP	SHIPPING (Estimate only)	3.00	8.00	24.00
BK2019ITU20	SETINA PB450L WITH WHELEN IONS, 2 RED/WHITE, 2 BLUE/ 2020 FORD UTILITY	1.00	924.95	924.95
PK1126ITU20TM	SETINA 10XL C COATED POLY PARTITION, 2020+ UTILITY	1.00	900.80	900.80
QK0635ITU20	SETINA OEM REPLACEMENT SEAT W/ #12 VINYL COATED EXPANDED METAL CARGO PARTITION & CENTER PULL SEAT BELTS	1.00	1,319.40	1,319.40
TK2307ITU20	SETINA CARGO DECK WITH LOWER TRAY	1.00	1,230.85	1,230.85
SHIP	SHIPPING (ESTIMATE ONLY)	1.00	750.00	750.00
7170-0734-04	GAMBER JOHNSON CONSOLE KIT, 2020+ FORD UTILITY 17170 EFJ FACE PLATE 7160-0339 CEN COM FACEPLATE ***CONFIRM FIT***	1.00	852.12	852.12
7160-1337-01	GAMBER JOHNSON CLOSE-TO-DASH TABLET MOUNT, 2020 UTILITY	1.00	256.61	256.61
73557	BLUE SEA DUAL USB	2.00	54.17	108.34
SUPPLIES	12 VOLT POWER PORT	2.00	3.00	6.00
SHIP	SHIPPING (ESTIMATE ONLY)	1.00	100.00	100.00
MMSU-1	MAGNETIC MIC SINGLE UNIT	1.00	30.14	30.14
COAX	COAX CABLE	1.00	15.43	15.43
EMFLX-M10008-...	E/M WAVE WIDE BAND VHF QUARTER-WAVE ANTENNA	1.00	98.05	98.05
SH-IN2440	PANORAMA ANTENNA SHARKEE	1.00	258.75	258.75
SHIP	SHIPPING (Estimate only)	1.00	15.00	15.00
76610	90 AMP MEGA CIRCUIT BREAKER	1.00	41.99	41.99
70165	ATC 6 TERMINAL FUSE PANEL	3.00	16.95333	50.86
SUPPLIES	INSTALLATION SUPPLIES	1.00	750.00	750.00
HARNESS	CUSTOM WIRE HARNESS	1.00	450.00	450.00
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SA-1033-HATCH	CUSTOM HATCH HARNESS	1.00	157.50	157.50
SA-1033-MAIN	CUSTOM MAIN HARNESS, FORD UTILITY	1.00	540.00	540.00
SA-1033-OVERLAY	CUSTOM OVERLAY HARNESS	1.00	63.00	63.00
SA-1033-REAR	CUSTOM REAR HARNESS	1.00	81.90	81.90
SA-402	CORE FRONT END HARNESS, CEM TO PUSH BUMPER	1.00	79.95	79.95
SA-313	FORD EXPLORER MIRROR HARNESS	1.00	10.26	10.26
SA-412	CORE FRONT END HARNESS, MPOWER INTEGRATION	1.00	79.95	79.95
2601B	EGIS PDM 14 CIRCUIT W/ KILL SWITCH	1.00	176.52	176.52
901466	EGIS BUSBAR OFFSET	1.00	2.52	2.52
8020-2001B	EGIS CUSTOM LABEL SET	1.00	4.20	4.20
8029B	EGIS RT FUSE BLOCK, 12 CIRCUIT	1.00	31.20	31.20
HRP1	HEADREST PRINTER MOUNT	1.00	378.00	378.00
SHIP	SHIPPING (Estimate only)	1.00	15.00	15.00
CAT6	CAT 6 CABLE	1.00	15.95	15.95
LPS-140	ADD ON ITEMS: Power Supply For Use With DS-GTC-220, DS-GTC-610, DS-GTC-800, DS-GTC-900, DS-GTC-1000, DS-GTC-1100, DS-GTC-1200, And DS-GTC-1300 Series Docking Stations	1.00	141.45	141.45
SHIP	SHIPPING (ESTIMATE ONLY)	1.00	25.00	25.00
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		Sales Tax (0.0%) \$0.00		
		Total \$20,996.21		



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CAT6	CAT 6 CABLE	1.00	15.95	15.95
CAT6 COUPLER	CAT 6 COUPLER	1.00	5.99	5.99
CAT6 SPLIT	CAT6 2 WAY SPLITTER	1.00	15.68	15.68
CLBV2V	WHELEN VEHICLE TO VEHICLE SYNC, LIGHTBAR MOUNTED	1.00	195.50	195.50
CEM16	WHELEN WECAN X EXPANSION MODULE, 16 OUTPUT 4 INPUT	2.00	165.73	331.46
SA-1033-TLF-FPI...	CUSTOM UTILITY TAIL LIGHT FLASHER HARNESS	2.00	66.50	133.00
I2D	WHELEN ION DUO RED/WHITE (SIDE WINDOW)	1.00	116.48	116.48
I2E	WHELEN ION DUO BLUE/WHITE (SIDE WINDOW)	1.00	116.48	116.48
60CREGCS	WHELEN 6" ROUND LED INTERIOR LIGHT RED/WHITE	1.00	151.19	151.19
I2D	WHELEN ION DUO RED/WHITE (LICENSE PLATE)	1.00	116.48	116.48
I2E	WHELEN ION DUO BLUE/WHITE (LICENSE PLATE)	1.00	116.48	116.48
TLI2K	WHELEN ION T-SERIES DUO, RED/AMBER	1.00	113.00	113.00
TLI2M	WHELEN ION T-SERIES DUO, BLUE/AMBER	1.00	113.00	113.00
PSD02FCR	WHELEN STRIP LIGHT PLUS DUO RED/WHITE	1.00	123.43	123.43
Thank you for allowing us to bid on your vehicle and equipment needs. This estimate is valid for 7 days. Special ordered equipment will be invoiced upon order placement.		Subtotal		
		Sales Tax (0.0%)		
		Total		



10-33 Vehicle Services, LLC

N4615 Indian Point Rd.

Sullivan, WI 53178

Phone: (262) 490-3109

Email: 10-33@charter.net

Estimate

Date	Estimate #
11/8/2024	2524

Customer:

Fort Atkinson Police Department
101 S Water St.
Fort Atkinson, WI 53538

Item	Description	Qty	Rate	Total
SHIP	SHIPPING (Estimate only)	3.00	8.00	24.00
BK2019ITU20	SETINA PB450L WITH WHELEN IONS, 2 RED/WHITE, 2 BLUE/ 2020 FORD UTILITY	1.00	924.95	924.95
PK1126ITU20TM	SETINA 10XL C COATED POLY PARTITION, 2020+ UTILITY	1.00	900.80	900.80
QK0635ITU20	SETINA OEM REPLACEMENT SEAT W/ #12 VINYL COATED EXPANDED METAL CARGO PARTITION & CENTER PULL SEAT BELTS	1.00	1,319.40	1,319.40
TK2307ITU20	SETINA CARGO DECK WITH LOWER TRAY	1.00	1,230.85	1,230.85
SHIP	SHIPPING (ESTIMATE ONLY)	1.00	750.00	750.00
7170-0734-04	GAMBER JOHNSON CONSOLE KIT, 2020+ FORD UTILITY 17170 EFJ FACE PLATE 7160-0339 CEN COM FACEPLATE ***CONFIRM FIT***	1.00	852.12	852.12
7160-1337-01	GAMBER JOHNSON CLOSE-TO-DASH TABLET MOUNT, 2020 UTILITY	1.00	256.61	256.61
73557	BLUE SEA DUAL USB	2.00	54.17	108.34
SUPPLIES	12 VOLT POWER PORT	2.00	3.00	6.00
SHIP	SHIPPING (ESTIMATE ONLY)	1.00	100.00	100.00
MMSU-1	MAGNETIC MIC SINGLE UNIT	1.00	30.14	30.14
COAX	COAX CABLE	1.00	15.43	15.43
EMFLX-M10008-...	E/M WAVE WIDE BAND VHF QUARTER-WAVE ANTENNA	1.00	98.05	98.05
SH-IN2440	PANORAMA ANTENNA SHARKEE	1.00	258.75	258.75
SHIP	SHIPPING (Estimate only)	1.00	15.00	15.00
76610	90 AMP MEGA CIRCUIT BREAKER	1.00	41.99	41.99
70165	ATC 6 TERMINAL FUSE PANEL	3.00	16.95333	50.86
SUPPLIES	INSTALLATION SUPPLIES	1.00	750.00	750.00
HARNESS	CUSTOM WIRE HARNESS	1.00	450.00	450.00

Thank you for allowing us to bid on your vehicle and equipment needs. This estimate is valid for 7 days. Special ordered equipment will be invoiced upon order placement.

Subtotal

Sales Tax (0.0%)

Total



10-33 Vehicle Services, LLC

N4615 Indian Point Rd.

Sullivan, WI 53178

Phone: (262) 490-3109

Email: 10-33@charter.net

Estimate

Date	Estimate #
11/8/2024	2524

Customer:

Fort Atkinson Police Department
101 S Water St.
Fort Atkinson, WI 53538

Item	Description	Qty	Rate	Total
SA-1033-HATCH	CUSTOM HATCH HARNESS	1.00	157.50	157.50
SA-1033-MAIN	CUSTOM MAIN HARNESS, FORD UTILITY	1.00	540.00	540.00
SA-1033-OVERLAY	CUSTOM OVERLAY HARNESS	1.00	63.00	63.00
SA-1033-REAR	CUSTOM REAR HARNESS	1.00	81.90	81.90
SA-402	CORE FRONT END HARNESS, CEM TO PUSH BUMPER	1.00	79.95	79.95
SA-313	FORD EXPLORER MIRROR HARNESS	1.00	10.26	10.26
SA-412	CORE FRONT END HARNESS, MPOWER INTEGRATION	1.00	79.95	79.95
2601B	EGIS PDM 14 CIRCUIT W/ KILL SWITCH	1.00	176.52	176.52
901466	EGIS BUSBAR OFFSET	1.00	2.52	2.52
8020-2001B	EGIS CUSTOM LABEL SET	1.00	4.20	4.20
8029B	EGIS RT FUSE BLOCK, 12 CIRCUIT	1.00	31.20	31.20
HRP1	HEADREST PRINTER MOUNT	1.00	378.00	378.00
SHIP	SHIPPING (Estimate only)	1.00	15.00	15.00
CAT6	CAT 6 CABLE	1.00	15.95	15.95
LPS-140	ADD ON ITEMS: Power Supply For Use With DS-GTC-220, DS-GTC-610, DS-GTC-800, DS-GTC-900, DS-GTC-1000, DS-GTC-1100, DS-GTC-1200, And DS-GTC-1300 Series Docking Stations	1.00	141.45	141.45
SHIP	SHIPPING (ESTIMATE ONLY)	1.00	25.00	25.00
Thank you for allowing us to bid on your vehicle and equipment needs. This estimate is valid for 7 days. Special ordered equipment will be invoiced upon order placement.		Subtotal \$20,996.21		
		Sales Tax (0.0%) \$0.00		
		Total \$20,996.21		



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Ben Dayton, Director of Parks and Recreation

RE: Review and possible action on seven construction package contracts for the Haumerson's Pond Garage/Shelter in an amount not to exceed \$292,939.66 (Dayton, Director of Parks and Recreation)

BACKGROUND

The Haumerson's Pond Garage/Shelter building received a grant from the Wisconsin DNR in January 2025. Per the grant requirements, contracts over \$25,000 must have a Class II Public Bid notice. The Class II notice was published twice in the Daily Union on September 19, 2024 and October 4, 2024. The bid must be awarded to the lowest "responsible bidder."

Staff completed the Public Bid process on October 11, 2024. After completion, additional contractors were solicited to fulfill the required components for this building. Contracts were distributed to all contractors, which included the project timeline and expectations. The City Council approved the Public Monument Review application for this project on May 21, 2024. However, all of the actual costs and bids from contractors were unknown at that time. Staff moved ahead with the approved project but soon realized that the purchase orders for construction were beyond the level of staff approval. At this time, staff is seeking Council review and approval of seven construction package contracts to continue this project.

DISCUSSION

Following the Class II bid notice requirements, an initial advertisement for the bid was posted on the City of Fort Atkinson's Website and submitted to the Jefferson County Daily Union newspaper, and all sealed bids were opened publicly on October 11th at 2 p.m. at the Municipal Building.

Staff received five sealed bids before the deadline of October 11, 2024. Two construction packages (Masonry and Trim/Finishes) did not receive a bid, and none received multiple bids. Of the submitted bids, all came from contractors within Jefferson County, including several who have worked with the city previously.

After consulting with City Engineering staff, the Trim and Finishes package was revised to include two garage doors and two concession windows. Staff had previously received quotes

for garage doors and concessions windows from Janesville Door in Janesville and Dunsmore Doors in Fort Atkinson. Dunsmore Doors provided the lowest proposal.

Staff proposed adding the three walk-through doors to the General Carpentry Package. BOS Design Builders provided an acceptable quote to include the doors with their proposal at an additional cost.

The Masonry Package received a single bid from Midwest Masonry after the deadline. Staff at Midwest Masonry had previously worked with the Friends of Haumerson's Pond during the construction of the 2017 Warming House. Given their experience with the previous project and the quality of work, staff was comfortable accepting their quote.

Below is a table summarizing the revenue sources for this project.

Secured Revenues:	Totals:
Friends of Haumerson's Pond Initial Donation	\$55,000.00
Fort Atkinson Community Foundation	\$45,000.00
Wisconsin Department of Natural Resources Grant	\$100,000.00
TOTAL:	\$200,000.00

The Friends of Haumerson's Pond are dedicated to raising all remaining funds necessary to complete this project. In addition to their initial commitment of \$55,000.00, they also have \$33,000.00 in their savings account. The Friends group has committed to fundraising for the balance of this project. The City has not committed to financing any of the hard costs of this project, aside from the staff time associated with it.

Below is an overview of the quoted amount for each construction package, including the bidder.

MECHANICAL AND PLUMBING PACKAGE		
AT Plumbing- Fort Atkinson, WI	TOTAL	\$52,723.00
GENERAL CARPENTRY PACKAGE-REVISED		
BOS Design Builders- Fort Atkinson, WI	TOTAL	\$124,546.00
Added pedestrian doors (3)	TOTAL	\$7,956.66
Donation towards Project		(\$25,000.00)
MASONRY PACKAGE		
Midwest Masonry- Fort Atkinson, WI	TOTAL	\$44,100.00
CONCRETE AND FOUNDATIONS PACKAGE		
D-N-D Concrete- Jefferson, WI	TOTAL	\$35,468.00
GRADING, EXCAVATION, RESTORATION		

PACKAGE		
Jaeckel Bros – Jefferson, WI	TOTAL	\$16,870.00
TRIM AND FINISHES PACKAGE-REVISED		
Dunsmoor Doors- Fort Atkinson, WI	TOTAL	\$4,100.00
ELECTRICAL PACKAGE		
Lueder Electric- Fort Atkinson, WI	TOTAL	\$7,176.00
	Total	\$292,939.66
	W/Donation	\$267,939.66

It is worth noting that BOS Design Builders included a donation to the Friends of Haumerson's Pond at the project's completion.

FINANCIAL ANALYSIS

The project is receiving \$100,000.00 in funding from a Wisconsin Department of Natural Resources Grant and \$45,000 from the Fort Atkinson Community Foundation. All additional funding will come from donations already raised by Friends of Hammerson's Pond.

As discussed, this project was divided into seven packages. Two of those packages were modified to fulfill the necessary elements to complete the project.

Below is a breakdown of the total estimated cost of the project.

Contractor and Construction Expenses	Totals:
Sum of Seven Bid Packages	\$292,939.66
Contingency 10%	\$29,293.97
WE Gas Meter Relocate (EST)	\$2,000
WE Electric Install (EST)	\$1,500
GRAND TOTAL	\$325,733.63

Note that BOS intends to donate \$25,000 back to the Friends of Haumerson's Pond at project completion. This donation is not credited in the expense table above, but may be accessed by the City in the future if the Friends group is unable to complete fundraising in a timely manner. Now that all costs are known, City staff and the Friends are working on an agreement committing the Friends to raising funds for this project by a specific date. The City is acting as the General Contractor, which results in cost savings but also opportunity costs for other projects and operations in the Department.

Weather permitting, the date for substantial completion is April 30, 2025.

RECOMMENDATION

Staff recommends the City Council award the contracts for the Haumerson's Pond garage/shelter construction project to the Contractors listed in this memo for a total amount not to exceed \$292,939.66.

Note that the total of \$325,733.63, which includes contingency and gas and electric estimates, will be the responsibility of the Friends of Haumerson's Pond through grants, donations, and fundraising.

ATTACHMENTS

1. Advertisement for Bids -City of Fort Atkinson- Haumerson Pond 9.26.24
2. 2. City of Fort Atkinson Haumerson Pond Bid List 10.30.24
3. 13. FHP-Letter of Commitment 2023_000214
4. FHP Community Foundation Grant Acceptance Letter 2.26.22

ADVERTISEMENT FOR BIDS

Haumerson Pond Garage
City of Fort Atkinson, Wisconsin

Sealed bids will be received until **2:00 P.M., on October 11, 2024** at the Municipal Building, 101 North Main Street, Fort Atkinson, Wisconsin, 53538. The bids will be opened and read at that time in the Municipal Building. Questions should be submitted in writing to bdayton@fortatkinsonwi.gov. Answers will be provided to all bidders. Questions asked less than 3 days before the deadline may not be answered.

Bids are being solicited from contractors for construction of a roughly 1200 SF storage building at Bark River Nature Park, also referred to as Haumerson's Pond. The building will include the addition of a separately constructed timber frame structure, not a part of this contract. Seven bid packages are outlined below. Each package will be awarded to the lowest responsible bidder.

	BRIEF DESCRIPTION
MECHANICAL AND PLUMBING PACKAGE	Includes installation of water, sewer, gas to the site and within the building. In-floor hydronic system will provide heat. Small electric water heater will provide hot water to the kitchen. Installation of floor mount drinking fountain on the patio area.
GENERAL CARPENTRY PACKAGE	Includes framing, insulation, drywall, brick veneer, and roofing (entire structure). <u>Excluding framing of the timber frame shelter structure.</u> <u>Excluding stainless steel countertops.</u>
MASONRY PACKAGE	Included installation of brick veneer. Bricks provided by the owner.
CONCRETE AND FOUNDATIONS PACKAGE	Includes interior and exterior concrete, footings, and foundation. A portion will include exposed aggregate finish under the timber frame shelter.
GRADING, EXCAVATION, RESTORATION PACKAGE	Includes foundations excavation, tree/shrub removal, installation of erosion controls, site grading, prep work of asphalt driveway (to be paved by owner), and finish restoration with topsoil and hydroseed.
TRIM AND FINISHES PACKAGE	Includes exterior doors, garage doors and concessions windows.
ELECTRICAL PACKAGE	Includes electrical service, rough in, and finish work.

Plans and specifications are available electronically by emailing Ben Dayton at bdayton@fortatkinsonwi.gov

All bids should be addressed to Ben Dayton, Parks and Recreation Director, City of Fort Atkinson, 101 North Main Street, Fort Atkinson, WI, 53538, and the name and address of the bidder marked on the outside of the envelope. Said envelope shall be plainly marked "**Haumerson Pond Garage – City of Fort Atkinson**".

The anticipated start date for this project **is 2024. All work should be completed by 2025.** Include in your price estimate, your approximate construction timeline.

The City Council of the City of Fort Atkinson has the right to accept or reject any or all bids outright, and further, to award the Contract to the bidder, who in the judgment of the City Council, will best serve the interest of the City of Fort Atkinson.

CITY OF FORT ATKINSON

Michelle Ebbert, City Clerk/Treasurer

BID LIST

[illegible]



Steve Mode
(414) 331-6704
steve.mode@waynehayesrealestate.com

Craig Roost
(920) 728-0353
roosterm@gmail.com

Brooke Franseen

Director of Park & Rec Dept.

City of Fort Atkinson, WI.

101 N Main St.

Fort Atkinson, Wisconsin 53538

Dear Brooke,

Please be advised that the "Friends of Haumerson's Pond" is committed to the completion of capital improvements at Bark River Nature Park and Haumerson's Pond. Our commitment to the construction of a multipurpose shelter building, land scaping and parking lot lighting shall be in the form of fundraising, monetary donation and volunteer labor.

The Friends group's past record of completion of park improvements thus far shall act as a testament to the group's tenacity, work ethic and commitment to the park. The Friends group is committed to raising a minimum of \$55,000.00 for the completion of this project.

Sincerely,

Steven L Mode

Friends of Haumerson's Pond



Where Gifts Today Build Better Tomorrows

April 26, 2022

Mr. Steve Mode
Friends of Haumerson's Pond
N2192 Clearview Lane
Fort Atkinson, WI 53538

Dear Steve,

At its April 21, 2022 meeting, the Board of Directors of the Fort Atkinson Community Foundation reviewed and discussed the Friends of Haumerson's Pond request for a grant of \$45,000 to help build a storage/concession building for use at Haumerson's Pond.

We are pleased to inform you that the Board voted to approve a matching challenge grant of \$45,000 to assist with the project, contingent upon a final approval of the project by the Fort Atkinson City Council. If the project is approved by the Council, FHP will first need to raise \$45,000 in matching funds before becoming eligible to receive the Foundation's grant. The grant will come from the Foundation's Mary Hoard Fund and will be payable to the City of Fort Atkinson upon the presentation of paid invoices related to the project. Deadline for use of the grant is Dec. 31, 2023.

To initiate reimbursement, please have the City submit the documentation described above to the Community Foundation's office at 244 N. Main St., Fort Atkinson.

The Community Foundation would appreciate any public recognition of this grant and would be pleased to be included in a press release or photograph for the local newspaper. If you have any questions, please contact our executive director, Sue Hartwick, at (920) 563-3210 or via email at facf@fortfoundation.org.

To accept this grant, we ask that you sign and date the letter below and return it to me in the enclosed envelope. Please make a copy for your records.

Sincerely yours,

Loren Gray, Chairman
Fort Atkinson Community Foundation

cc: Brooke Franseen, Director, FA Parks & Rec. Dept.
Rebecca LeMire, Fort Atkinson City Manager

Accepted on this 2nd day of May, 2022

By:
Steve Mode, Friends of Haumerson's Pond



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Ben Dayton, Director of Parks and Recreation

RE: Review and possible action relating to 2025 Capital Outlay Purchase of a 2025 F150 Truck including Tommy Gate Liftgate and Safety Light for the Parks and Recreation Department (Dayton, Parks and Recreation Director)

BACKGROUND

Parks and Recreation staff continue to diligently follow the department's vehicle replacement plan. Before this plan, the Department relied on vehicle longevity and the skilled repair work of the City's Mechanics. The 15-year replacement plan for all department vehicles will reduce the need for larger, more costly repairs while also deploying more fuel-efficient vehicles into year-round service.

This request is to replace an existing fleet vehicle for full time staff, while shifting the 2003 Ford F-150 to the park's seasonal staff fleet.

DISCUSSION

During peak staffing, the department has five full-time parks staff, four seasonal parks maintenance staff, and four seasonal cityscape staff who need transportation to perform work duties. Staff often ride together to accommodate the number of vehicles. At times, seasonal staff must make additional stops to drop off a team member at a specific location. Inevitably, productivity is lost throughout the summer when staff finish early, encounter unforeseen delays, or need additional supplies from the park's shop. These situations can be mitigated by replacing a vehicle in the full-time fleet and, instead of removing the the 2003 F-150 from the fleet entirely, retaining it for seasonal staff use.

FINANCIAL ANALYSIS

Staff sought quotes from Griffin Ford Fort Atkinson and Ewald Automotive Group of Hartford. The Parks and Recreation Department has a longstanding and positive relationship with Griffin Ford of Fort Atkinson. A second quote was received from Ewald Automotive Group, which has also provided several competitive quotes for the city.

The work performed by the Park's staff requires several add-on items to be installed on the vehicle prior to deployment. These items are essential to the vehicle's durability and

functionality. The final sale price includes the installation of a spray-in bed liner, Tommy Gate Liftgate, and Amber Roof Light system.

Griffin Ford Proposal:

- **Final Sale Price: \$44,994.00**

Ewald Automotive Group Proposal:

- **Final Sale Price: \$45,134.00** (not including non-tax fees, registration, and plates)

The total purchase price from Griffin Ford, including non-tax fees, service fees, registration, and vehicle plates, is **\$45,582.00**.

The department budgeted \$43,500 through the 2024-25 borrowing for the F-150 purchase. Since then, vehicle prices have increased more than the original borrowed funds. Staff has confirmed that additional funds from the 2024-25 borrowing are available to offset the price difference.

Lastly, staff will continue to evaluate our fleet needs, and if the retained F-150 is not utilized as anticipated, the vehicle will be sold on the Wisconsin Surplus Online Auction website.

RECOMMENDATION

Staff recommends that the City Council authorize the purchase of the 2025 Ford F-150 from Griffin Ford at a cost not to exceed \$45,582.00 to be paid for through 2024-2025 borrowed funds.

ATTACHMENTS

1. Griffin Ford Quote
2. Ewald Quote
3. Parks Rec & Cityscape Vehicle Fleet



Date: **12/13/2024 9:05 AM**
Salesperson: **Dennis Mitchell Paul Schepp**
Manager: **John Chady**

FOR INTERNAL USE ONLY

BUSINESS NAME **CITY OF FORT ATKINSON PARKS & RECREATION** Home Phone: **(920) 563-7781**
CONTACT **JJ YANKE**
30 N WATER ST WEST
Address : **FORT ATKINSON, WI 53538** Work Phone:
JEFFERSON CO
E-Mail : **JYANKE@FORTATKINSONWI.NET** Cell Phone: **(920) 723-1112**

VEHICLE
Stock # : New / Used : **New** VIN : Mileage : **0**
Vehicle : **2025 Ford F-150** Color :
Type : **XL 4x4 Regular**

TRADE IN
Payoff : VIN : Mileage :
Vehicle : Color :
Type :

Selling Price	44,610.00
Discount	6,131.00
Adjusted Price	38,479.00
Spray in bedliner	550.00
Tommy Gate G2-60-1542	4,750.00
Amber strobe	620.00
Hitch	595.00
Total Purchase	44,994.00
Trade Allowance	
Trade Difference	
Service Fee	399.00
Non Tax Fees	189.00
Trade Payoff	
Cash Deposit	
Balance	45,582.00

Customer Approval: _____ Management Approval: _____

By signing this authorization form, you certify that the above personal information is correct and accurate, and authorize the release of credit and employment information. By signing above, I provide to the dealership and its affiliates consent to communicate with me about my vehicle or any future vehicles using electronic, verbal and written communications including but not limited to eMail, text messaging, SMS, phone calls and direct mail. Terms and Conditions subject to credit approval. For Information Only. This is not an offer or contract for sale.



Ewald Automotive Group

Chrissy Gensch | 262-673-9400 | chrissy.gensch@ewaldauto.com

Ben Dayton

Prepared For: City of Fort Atkinson

920-397-9910

bdayton@fortatkinsonwi.gov

Vehicle: [Fleet] 2025 Ford F-150 (F1L) XL 4WD Reg Cab 8' Box





Ewald Automotive Group

Chrissy Gensch | 262-673-9400 | chrissy.gensch@ewaldauto.com

Vehicle: [Fleet] 2025 Ford F-150 (F1L) XL 4WD Reg Cab 8' Box (✔ Complete)

Quote Worksheet

	MSRP
Base Price	\$42,365.00
Dest Charge	\$1,995.00
Total Options	\$6,569.00
Subtotal	\$50,929.00
Subtotal Pre-Tax Adjustments	\$0.00
Less Customer Discount	(\$5,795.00)
Subtotal Discount	(\$5,795.00)
Trade-In	\$0.00
Subtotal Trade-In	\$0.00
Taxable Price	\$45,134.00
Sales Tax	\$0.00
Subtotal Taxes	\$0.00
Subtotal Post-Tax Adjustments	\$0.00
Total Sales Price	\$45,134.00

Comments:

2025 Ford F150 4WD Reg Cab 8' box to the specifications as detailed. Registration fees are not included. Due to current market, lead time can not be guaranteed.

Dealer Signature / Date

Customer Signature / Date

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Data Version: 24170. Data Updated: Dec 10, 2024 6:48:00 PM PST.



Vehicle: [Fleet] 2025 Ford F-150 (F1L) XL 4WD Reg Cab 8' Box (Complete)

Standard Equipment

Mechanical	
	Engine: 2.7L V6 EcoBoost -inc: auto start-stop technology (STD)
	Transmission: Electronic 10-Speed Automatic -inc: SelectShift w/progressive range select and selectable drive modes: normal, ECO, sport, tow/haul, slippery, deep snow/sand and mud/rut (STD)
	3.55 Axle Ratio (STD)
	50 State Emissions System
	Electronic Transfer Case
	Part-Time Four-Wheel Drive
	200 Amp Alternator
	70-Amp/Hr 760CCA Maintenance-Free Battery w/Run Down Protection
	Class IV Towing Equipment -inc: Hitch and Trailer Sway Control
	Trailer Wiring Harness
	1720# Maximum Payload
	GVWR: 6,450 lbs Payload Package
	HD Shock Absorbers
	Front Anti-Roll Bar
	Electric Power-Assist Steering
	Single Stainless Steel Exhaust
	36 Gal. Fuel Tank
	Auto Locking Hubs
	Double Wishbone Front Suspension w/Coil Springs
	Solid Axle Rear Suspension w/Leaf Springs
	4-Wheel Disc Brakes w/4-Wheel ABS, Front And Rear Vented Discs, Brake Assist, Hill Hold Control and Electric Parking Brake
Exterior	
	Wheels: 17" Silver Steel (STD)
	Tires: 265/70R17 BSW A/T (STD)
	Regular Box Style
	Steel Spare Wheel
	Full-Size Spare Tire Stored Underbody w/Crankdown
	Clearcoat Paint

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Data Version: 24170. Data Updated: Dec 10, 2024 6:48:00 PM PST.



Ewald Automotive Group

Chrissy Gensch | 262-673-9400 | chrissy.gensch@ewaldauto.com

Vehicle: [Fleet] 2025 Ford F-150 (F1L) XL 4WD Reg Cab 8' Box (✔ Complete)

Exterior

- Black Rear Step Bumper
- Black Front Bumper w/Black Rub Strip/Fascia Accent and 2 Tow Hooks
- Black Side Windows Trim
- Black Door Handles
- Black Power Heated Side Mirrors w/Manual Folding
- Fixed Rear Window
- Light Tinted Glass
- Variable Intermittent Wipers
- Aluminum Panels
- Black Grille
- Tailgate Rear Cargo Access
- Manual Tailgate/Rear Door Lock
- Ford Co-Pilot360 - Autolamp Auto On/Off Reflector Led Low/High Beam Auto High-Beam Daytime Running Lights Preference Setting Headlamps w/Delay-Off
- Cargo Lamp w/High Mount Stop Light
- Perimeter/Approach Lights
- Headlights-Automatic Highbeams

Entertainment

- Radio w/Seek-Scan, Clock, Speed Compensated Volume Control, Steering Wheel Controls, Radio Data System and External Memory Control
- Radio: AM/FM Stereo w/4 Speakers -inc: auxiliary audio input jack
- Fixed Antenna

Interior

- Cloth 40/20/40 Front Seat -inc: 2-way manual driver/passenger and armrest
- Driver Seat
- Passenger Seat
- Manual Tilt/Telescoping Steering Column
- Gauges -inc: Speedometer, Odometer, Voltmeter, Oil Pressure, Engine Coolant Temp, Tachometer, Transmission Fluid Temp, Trip Odometer and Trip Computer
- FordPass Connect 5G Mobile Hotspot Internet Access
- Front Cupholder

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Data Version: 24170. Data Updated: Dec 10, 2024 6:48:00 PM PST.



Ewald Automotive Group

Chrissy Gensch | 262-673-9400 | chrissy.gensch@ewaldauto.com

Vehicle: [Fleet] 2025 Ford F-150 (F1L) XL 4WD Reg Cab 8' Box (Complete)

Interior	
	Compass
	Remote Keyless Entry w/Integrated Key Transmitter, Illuminated Entry and Panic Button
	Cruise Control w/Steering Wheel Controls
	Manual Air Conditioning
	Locking Glove Box
	Interior Trim -inc: Cabback Insulator and Chrome Interior Accents
	Full Cloth Headliner
	Urethane Gear Shifter Material
	Day-Night Rearview Mirror
	Passenger Visor Vanity Mirror
	Mini Overhead Console w/Storage
	Front Map Lights
	Fade-To-Off Interior Lighting
	Full Vinyl/Rubber Floor Covering
	Pickup Cargo Box Lights
	Smart Device Remote Engine Start
	SYNC 4 w/Enhanced Voice Recognition -inc: 12" LCD capacitive touchscreen w/swipe capability, wireless phone connection, cloud connected, AppLink w/App catalog, 911 Assist, Apple CarPlay and Android Auto compatibility, digital owners manual and conversational voice command recognition
	Instrument Panel Bin, Dashboard Storage, Interior Concealed Storage, Driver And Passenger Door Bins
	Power 1st Row Windows w/Driver And Passenger 1-Touch Up/Down
	Power Door Locks w/Autolock Feature
	Redundant Digital Speedometer
	Trip Computer
	Outside Temp Gauge
	Digital/Analog Appearance
	Seats w/Carpet Back Material
	Manual Adjustable Front Head Restraints
	Perimeter Alarm
	Securilock Anti-Theft Ignition (pats) Immobilizer
	Air Filtration

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Vehicle: [Fleet] 2025 Ford F-150 (F1L) XL 4WD Reg Cab 8' Box (Complete)

Safety-Mechanical

AdvanceTrac w/Roll Stability Control Electronic Stability Control (ESC) And Roll Stability Control (RSC)
ABS And Driveline Traction Control

Safety-Exterior

Side Impact Beams

Safety-Interior

Dual Stage Driver And Passenger Seat-Mounted Side Airbags
Rear Parking Sensors
BLIS (Blind Spot Information System) Blind Spot
PCA with AEB and Intersection Assist
Lane Keeping Alert Lane Keeping Assist
Lane Keeping Alert Lane Departure Warning
Collision Mitigation-Front
Driver Monitoring-Alert
Evasion Assist
Collision Mitigation-Rear
Tire Specific Low Tire Pressure Warning
Dual Stage Driver And Passenger Front Airbags
Safety Canopy System Curtain 1st Row Airbags
Airbag Occupancy Sensor
Outboard Front Lap And Shoulder Safety Belts -inc: Height Adjusters and Pretensioners
Ford Co-Pilot360 - Reverse Camera Back-Up Camera

WARRANTY

Basic Years: 3
Basic Miles/km: 36,000
Drivetrain Years: 5
Drivetrain Miles/km: 60,000
Corrosion Years: 5
Corrosion Miles/km: Unlimited
Roadside Assistance Years: 5
Roadside Assistance Miles/km: 60,000

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Vehicle: [Fleet] 2025 Ford F-150 (F1L) XL 4WD Reg Cab 8' Box (Complete)

Selected Model and Options

MODEL		
CODE	MODEL	MSRP
F1L	2025 Ford F-150 XL 4WD Reg Cab 8' Box	\$42,365.00
COLORS		
CODE	DESCRIPTION	
M7	Carbonized Gray Metallic	
ENGINE		
CODE	DESCRIPTION	MSRP
99P	Engine: 2.7L V6 EcoBoost -inc: auto start-stop technology (STD)	\$0.00
TRANSMISSION		
CODE	DESCRIPTION	MSRP
44G	Transmission: Electronic 10-Speed Automatic -inc: SelectShift w/progressive range select and selectable drive modes: normal, ECO, sport, tow/haul, slippery, deep snow/sand and mud/rut (STD)	\$0.00
OPTION PACKAGE		
CODE	DESCRIPTION	MSRP
101A	Equipment Group 101A Standard	\$0.00
AXLE RATIO		
CODE	DESCRIPTION	MSRP
X19	3.55 Axle Ratio (STD)	\$0.00
WHEELS		
CODE	DESCRIPTION	MSRP
64C	Wheels: 17" Silver Steel (STD)	\$0.00
TIRES		
CODE	DESCRIPTION	MSRP
—	Tires: 265/70R17 BSW A/T (STD)	\$0.00

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Vehicle: [Fleet] 2025 Ford F-150 (F1L) XL 4WD Reg Cab 8' Box (Complete)

PRIMARY PAINT		
CODE	DESCRIPTION	MSRP
M7	Carbonized Gray Metallic	\$0.00
SEAT TYPE		
CODE	DESCRIPTION	MSRP
AS	Black w/Medium Dark Slate, Vinyl 40/20/40 Front Seat	\$0.00
ADDITIONAL EQUIPMENT - EXTERIOR		
CODE	DESCRIPTION	MSRP
153	Front License Plate Bracket -inc: Standard in states where required by law, optional to all others	\$0.00
18B	Black Platform Running Boards	\$250.00
96W	Tough Bed Spray-In Bedliner	\$595.00
CUSTOM EQUIPMENT		
CODE	DESCRIPTION	MSRP
DI-1	INSTALL TOMMYGATE LIFTGATE AND AMBER ROOF LIGHT	\$5,724.00
Options Total		\$6,569.00

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Vehicle: [Fleet] 2025 Ford F-150 (F1L) XL 4WD Reg Cab 8' Box ( Complete)

Price Summary

PRICE SUMMARY		MSRP
Base Price		\$42,365.00
Total Options		\$6,569.00
Vehicle Subtotal		\$48,934.00
Destination Charge		\$1,995.00
Grand Total		\$50,929.00

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Parks & Recreation / Cityscape Vehicles

Current Year

2025

Repair Notes	#	Year	Vehicle Type	Years Old	Replacment Year	Notes:
Hole in floor board, power steering pump seeping, rear diff cover seeping, both sides rocker panels rotted off, trans output shaft seal seeping	95	1999	Ford F-350 Flatbed	26	2026	Was approved with the 2022 borrowing for purchase in 2023 but replaced with a F150 in the 2023 CIP due to dealerships unable to get flatbeds for several years
Rocker panels, cab corners, and underneath the cab and seat all rusted	91	2003	Ford F-150	22		
Rear main seal leak and tommy gate is rotting out	90	2008	Ford F-250	17	2027	
n/a	94	2012	Ford F-250	13	2028	
n/a	93	2018	Ford F-250	7		
n/a	98	2022	Ford F-350	3		
n/a	97	2023	Ford F-150	2		
n/a	##	2025	Ford F-150	REQUESTING		
1982 van living life 1 qt of oil at a time. Oil leaks from every gasket, but runs and drives	28	1982	Ford E-150 Van	43	DPW	Cityscape
Replaced stick shift '23	18	1997	Chevy Pickup	28	DPW	Cityscape

Red shaded = no longer in use

Yellow shaded = replacement needed soon

Staff who need transportation to perform duties: 5 full time Parks staff, 4 seasonal Parks Maintenance staff, and 4 seasonal Cityscape staff

Decommissioned Vehicles						
Rocker pannels, cab corners and wheel-wells rotted out, rear main seal seeping—SOLD		2002	Ford F-150	21	2023-CIP	Replaced in 2023 with 2022 borrowed-funds from the scheduled flatbed-replacement
JUNK—antifreeze in motor		1991	Ford F-150	31	2022-CIP	Was replaced in 2022-CIP
Clutch getting worn—need replacement soon. No seasonals can drive stick shift		1997	Ford F-150			Cityscape—stick shift—scrapped 2023



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Tom Williamson, Public Works Superintendent

RE: Review and possible action relating to the purchase of Furniture and Fixtures for the Public Works and Parks Operations Facility Project (Williamson, Superintendent Public Works)

BACKGROUND

The Public Works and Parks Operations Facility Project, approved for construction by the City Council in the spring of 2024, is well underway. Overall facility construction commenced in March 2024 and has now been slated for building completion in February 2025. As a result, the design architect and staff felt it was necessary to commit to the purchase and contract installation of the necessary furniture, shelving and racking required to properly outfit the new facility in anticipation of a fast approaching move in date.

DISCUSSION

The borrowing for the project included items to be provided by the City including service shop equipment, facility operations equipment, furnishings, audio and video components, and storage racking and shelving. The Design Architect and City worked together during the design budgeting process to establish an anticipated budget of \$545,000.00 for all of these items, collectively called Furnishings, Fixtures, and Equipment (FFE). This budget served as a placeholder for the project borrowing.

The Public Works Department, with the assistance of Angus Young Architects, released a public request for bids on November 18th of this year. Staff received five (5) proposals from qualified firms. The items in this request include desks, chairs, tables, storage cabinets, shelving, and pallet racking. These items will be used to prepare the office spaces, multipurpose / break room, entry area, storage closets, and mezzanine areas for the addition of staff, equipment, and supplies to complete the initial move in process.

This is the second request for approval within the FFE category, after the tire changer, with additional requests anticipated.

FINANCIAL ANALYSIS

The proposals received range from a low bid of \$83,153.40 to a high bid of \$121,361.11, with one partial bid for storage items only. The low bidder was Emmons Business Interiors at \$83,153.40 and can be compared to the other bidders in the bid tabulation below and attached bid documents:

Fort Atkinson - Public Works & Parks Operations Facility FF&E

AYA Project Number 76131

December 10th, 2023 2:00 PM (CST)

<u>Furniture Supplier/Dealer</u>	Total
Atmosphere Interiors	\$98,949.69
Bradford Systems	INCOMPLETE
CJ Associates	\$90,173.40
Duet Resource Group	\$121,361.11
Emmons Business Interiors	\$83,153.40

The 2024 City Budget includes a Capitol Improvement Project borrowing for the new Public Works and Parks Operations Facility and anticipated a budget of \$545,000.00 for Furniture, Fixtures and Equipment (FFE) to properly equip the new facility. The Department would like to complete this purchase utilizing funds from the 2024 Public Works and Parks Operations Facility Project capitol funds borrowing.

The table below shows the total budget for FFE, the amount spent to date, the amount and category of the current request, as well as the balance. As one can see from this table, if this request is approved, the balance in the furnishing category will be \$126,846.60. The balances in the fixtures and equipment categories are \$85,000 and \$232,379.13, respectively. Staff continues to review the FFE needed to purchase for this project and anticipates returning to the City Council to authorize additional purchases in the future.

CATEGORY	BUDGET	SPENT TO DATE	THIS REQUEST	BALANCE
FURNISHINGS	\$ 210,000.00	\$ -	\$ 83,153.40	\$ 126,846.60
Desks, Tables, Chairs				
Racking and Storage				
Misc Storage				
Moving Expenses				
FIXTURES	\$ 85,000.00	\$ -	\$ -	\$ 85,000.00
Appliances				
Audio Visual Equip				
Network Installation				
Instalation Expenses				
EQUIPMENT	\$ 250,000.00	\$ 17,620.87	\$ -	\$ 232,379.13
Tire Changer				
Hydraulic Press				
Rolling Lifts				
Prod./Fab. Tools				
Floor Scrubber				
Brine Tank				
Pump Shed				
TOTALS	\$ 545,000.00	\$ 17,620.87	\$ 83,153.40	\$ 444,225.73

RECOMMENDATION

Staff recommends awarding the contract to Emmon's Business Group for the items included in their proposal for FFE for the Public Works and Parks Operations Facility in the amount not to exceed \$83,153.40.

ATTACHMENTS

1. EBI FF&E Fort Atkinson Public Works RFP_200-161_12.10.24
2. EBI PPT_200-161 Fort Atkinson Public Works RFP_12.10.24
3. 24593 City of Fort Atkinson - DPW Furniture Bid - CJ & Associates
4. 24593 City of Fort Atkinson - Public Works Building - Itemized Furniture Pricing
5. City of Fort Atkinson - Public Works & Parks - Duet Resource Group
6. 76131sp_FF&E Budget_ Atmosphere Response
7. Fort Atkinson Public Works Facility RFP_Atmosphere Response

FF&E BUDGET ALLOWANCES

PROJECT NAME: CoFort Atkinson - Public Works Facility
PROJECT NUMBER: 76131
DATE: 12/10/2024
REVISED:



BUILDING AREA AND PRODUCT	MANUFACTURER (Basis of Design)	PRODUCT CODE	LIST PRICE	QUANTITY	DISCOUNT %	TOTAL PRICE	NOTES
ENTRY 101							
Single Guest/Side Chair	Lorell: LLR60122	CH-1	\$394.00	2	51.28%	\$383.96	
RECEPTION 102							
60"x30" Sit/Stand Desk	Lorell: LLR18231 & LLR25970	D-1	\$1,035.00	1	51.224%	\$504.83	Includes Worksurface & Base
Task Seating (Mesh Back/Upholstered Seat)	HON: HPTCC1-T1UM	CH-2	\$500.00	1	56.10%	\$219.51	Includes lumbar, adj. height/seat/arms, tilt/locking
Chair Mat	COWI: DEFCM13242	M - 1	\$138.00	1	51.08%	\$67.51	
CONFERENCE 103							
120" Boat Shaped Table w/ Integrated Power Supply	OfficeSource: SELP237	T-1	\$3,271.00	1	59.85%	\$1,313.46	Cord management
Power Module	OfficeSource: OSTBPOWER	T-1	\$864.00	2	59.84%	\$693.96	(2) AC Outlets, (2) USB, (1) USB data, (1) data, (1) ohone (1) HDMI with 8' power cord
Executive Seating (Tufted Seat/Back)	Lorell: LLR62620	CH-3	\$724.00	12	59.67%	\$3,504.12	Caster Base
OFFICE 105							
72"x30" Desk Shell (Laminate)	Lorell Essentials Series LLR 18212	D-2	\$414.00	1	51.27%	\$201.74	
48"x24" Desk Bridge (Laminate)			\$239.00	1	51.19%	\$116.65	
Task Seating (Mesh Back/Upholstered Seat)	HON: HPTCC1-T1UM	CH-2	\$500.00	1	56.10%	\$219.51	Includes lumbar, adj. height/seat/arms, tilt/locking
Side/Guest Chair (Mesh Back/Upholstered Seat)	HON: H2285	CH-4	\$556.00	2	56.10%	\$488.20	w/ Arms
OFFICE 107							
72"x30" Desk Shell (Laminate)	Lorell Essentials Series LLR 18212	D-2	\$414.00	1	51.27%	\$201.74	
48"x24" Desk Bridge (Laminate)			\$239.00	1	51.19%	\$116.65	
Task Seating (Mesh Back/Upholstered Seat)	HON: HPTCC1-T1UM	CH-2	\$500.00	1	56.10%	\$219.51	Includes lumbar, adj. height/seat/arms, tilt/locking
Side/Guest Chair (Mesh Back/Upholstered Seat)	HON: H2285	CH-4	\$556.00	2	56.10%	\$488.20	w/ Arms
OFFICE 108							
72"x30" Desk Shell (Laminate)	Lorell Essentials Series LLR 18212	D-2	\$414.00	1	51.27%	\$201.74	
48"x24" Desk Bridge (Laminate)			\$239.00	1	51.19%	\$116.65	
72"x24" Credenza Shell (Laminate)		D-3	\$354.00	1	51.21%	\$172.72	
24"x24"x66" Personal Cabinet (Laminate)		S-1	\$1,455.00	1	51.21%	\$709.91	
Accessories/Drawer		S-2	\$138.00	1	51.15%	\$67.41	
26"x15" Wall Mount Hutch (Laminate)		S-3	\$316.00	2	51.29%	\$307.88	
Glass Hutch Doors			\$284.00	1	51.19%	\$138.63	72"W Add-On Glass Doors
69"x16.5" Wall Mount Tack Board		S-3	\$81.00	1	51.42%	\$39.35	
42" Round Tabletop (Laminate)	Lorell: LLR69990 & LLR18257	T-2	\$376.00	1	51.258%	\$183.27	Includes Table & Base
Mobile File Pedistal (Laminate)	Lorell: LLR18219	S-4	\$437.00	1	51.17%	\$213.39	
Task Seating (Mesh Back/Upholstered Seat)	HON: HPTCC1-T1UM	CH-2	\$500.00	1	56.10%	\$219.51	Includes lumbar, adj. height/seat/arms, tilt/locking
Side/Guest Chair (Mesh Back/Upholstered Seat)	HON: H2285	CH-4	\$556.00	3	56.10%	\$732.30	w/ Arms
OFFICE 109							
72"x30" Desk Shell (Laminate)	Lorell Essentials Series LLR 18212	D-2	\$414.00	1	51.27%	\$201.74	
48"x24" Desk Bridge (Laminate)			\$239.00	1	51.19%	\$116.65	
72"x24" Credenza Shell (Laminate)		D-3	\$354.00	1	51.21%	\$172.72	
24"x24"x66" Personal Cabinet (Laminate)		S-1	\$1,455.00	1	51.21%	\$709.91	
Accessories/Drawer		S-2	\$138.00	1	51.15%	\$67.41	
26"x15" Wall Mount Hutch (Laminate)		S-3	\$316.00	2	51.29%	\$307.88	
Glass Hutch Doors			\$284.00	2	51.19%	\$138.63	72"W Add-On Glass Doors
69"x16.5" Wall Mount Tack Board		S-3	\$81.00	1	51.42%	\$39.35	
42" Round Tabletop (Laminate)	Lorell: LLR69990 & LLR18257	T-2	\$376.00	1	51.258%	\$183.27	Includes Table & Base
Mobile File Pedistal (Laminate)	Lorell: LLR18219	S-4	\$437.00	1	51.17%	\$213.39	
Task Seating (Mesh Back/Upholstered Seat)	HON: HPTCC1-T1UM	CH-2	\$500.00	1	56.10%	\$219.51	Includes lumbar, adj. height/seat/arms, tilt/locking
Side/Guest Chair (Mesh Back/Upholstered Seat)	HON: H2285	CH-4	\$556.00	3	56.10%	\$732.30	w/ Arms
SAFETY EQUIPMENT 113							
Cabinet Storage 36"Wx18"Dx72"H	Uline H1105-T	S-5	\$1,150.00	1	51.22%	\$560.98	
Chrome Wire Shelving 36"Wx18"Dx63"H	Uline H6159	S-6	\$925.00	1	51.22%	\$451.22	
Garment Storage Center w/ Shelves	Uline H2449	S-7	\$638.00	1	51.26%	\$310.98	
BREAKROOM 118							
72"x24" Training Table	Lorell Furniture LLR16199	T-3	\$245.00	16	51.15%	\$1,914.88	
Flip/Nest Training Table Base	Lorell Furniture LLR60738	T-3	\$496.00	16	51.21%	\$3,872.16	
Modesty Panel	Lorell Furniture LLR60689	N/A	N/A	X			Product Has Been Discontinued
Nesting Training Chairs (Mesh Back/Upholstered Seat)	Lorell: LLR41846	CH-5	\$705.48	25	51.22%	\$8,603.25	2 Per/ Carton
74" Sofa	HON: HVLVL3	L-1	\$2,452.00	1	56.10%	\$1,076.49	
Single Lounge Seat	HON: HVLVL1	L-2	\$1,434.00	2	56.10%	\$1,259.12	
30"Hx30"Dia. Table (Laminate)	HON: HBTTRND30 & HBTTD30	T-4	\$895.00	2	57.317%	\$764.02	Includes Tabletop & Disc Base
Side Chair (Upholstered Seat/Poly Back)	HON: HMN2	CH-6	\$709.00	5	56.10%	\$1,556.35	
Banquette Seating (Grade 3 Upholstery Seat/Back)	HON: HASHB2 & HASGBSL	L-3	\$5,001.00	2	56.098%	\$4,268.63	Each is 56"W; Combined Total 112"W. Includes Ganging Hardware
Side Table (Laminate)	HON: H80193	T-5	\$580.00	1	55.24%	\$259.59	
Coffee Table (Laminate)	HON: H80191	T-6	\$705.00	1	55.24%	\$315.54	
PAINT AND SIGN STORAGE 121							
Bin Storage 36"Wx12"Dx75"H	Uline 1772BLU	S-7	\$1,013.00	2	51.24%	\$987.80	
Roll Storage 36"Wx24"Dx45"H	Uline H4888	S-8	\$675.00	2	51.22%	\$658.54	
Heavy Duty Shelf Unit 48"Wx24"Dx72"H	Uline H5724	S-9	\$103.00	6	51.46%	\$300.00	
Steel Assembly Table w/ Bottom Shelf	Uline H7698S	S-10	\$1,688.00	1	51.23%	\$823.17	
PARTS 126							
Cabinet Storage 30"Wx18"Dx72"H	Uline H8447GR	S-11	\$1,025.00	1	51.22%	\$500.00	
Pallet Racking 96"Wx42"Dx96"H	Uline H5715	S-12	\$1,188.00	4	51.24%	\$2,317.08	

BUILDING AREA AND PRODUCT	MANUFACTURER (Basis of Design)	PRODUCT CODE	LIST PRICE	QUANTITY	DISCOUNT %	TOTAL PRICE	NOTES
Wire Shelving 42"Wx96"H	Uline H5724	S-9	\$103.00	4	51.46%	\$200.00	For Pallet Rack
Wire Vertical Shelving 42"Wx96"H	Uline H10711-96	S-13	\$513.00	2	51.27%	\$500.00	
COLD STORAGE 134							
Pallet Racking 96"Wx42"Dx96"H	Uline 5715	S-12	\$1,188.00	3	51.24%	\$1,737.81	
Add On 96"Wx42"Dx96"	Uline 5715 Add	S-12	\$875.00	10	51.22%	\$4,268.30	
Wire Shelving 42"Dx96"W	Uline H5724	S-9	\$103.00	24	51.46%	\$1,200.00	
Cantilever Rack 56"Wx40"Dx96"H	Uline H3845	S-14	\$3,588.00	4	51.23%	\$7,000.00	
Standard Flammable Storage Cabinet	Uline H1564M-Y	S-15	\$3,150.00	1	51.22%	\$1,536.59	
MECHANIC OFFICE 130							
Industrial Office Desk	Uline H11146	D-4	\$1,713.00	2	51.23%	\$1,670.74	Single Pedestal
Task Seating (Mesh Back/Upholstered Seat)	HON: HPTCC1-T1UM	CH-2	\$500.00	2	56.10%	\$439.02	Includes lumbar, adj. height/seat/arms, tilt/locking
GARAGE MEZZANINE 201							
Pallet Racking 96"Wx42"Dx96"H	Uline H5715	S-12	\$1,188.00	4	51.24%	\$2,317.08	
Add On Unit 96"Wx42"Dx96"H	Uline H5715 ADD	S-12	\$875.00	8	51.22%	\$3,414.64	
Wire Shelving 42"Dx96"W	Uline H5724	S-9	\$103.00	24	51.46%	\$1,200.00	
PARTS MEZZANINE 202							
Tire Racking 48"Wx24"Dx96"H	Uline H8610	S-16	\$913.00	1	51.25%	\$445.12.	
Add On Unit 48"Wx24"Dx96"H	Uline H8610 ADD	S-16	\$638.00	2	51.26%	\$621.96	
Pallet Racking 96"Wx42"Dx96"H	Uline H5715	S-12	\$1,188.00	2	51.24%	\$1,158.54	
Add On Unit 96"Wx42"Dx96"H	Uline H5715 ADD	S-12	\$875.00	4	51.22%	\$1,707.32	
Wire Shelving 42"Dx96"W	Uline H5724	S-9	\$103.00	12	51.46%	\$600.00	
FF&E - BUDGET SUB TOTAL (PRODUCT ONLY)							
Sales Tax			\$0.00			-----	
Freight (Estimate)			\$0.00			-----	
Installation (Estimate)			\$6,060.96			\$75,761.99	
FF&E - BUDGET GRAND TOTAL						\$83,153.40	

NOTE: HON PRICING VALID TILL 01/17/2025

NOTE: ULINE PRICING VALID TILL 12/31/2024



City of Fort Atkinson: Public Works Facility RFP Response

12/10/2024

Your Space. Our Business.



Dear City of Fort Atkinson,

On behalf of our entire team, thank you for inviting us to submit our RFP for The City of Fort Atkinson: Public Works Facility. Our many years of industry experience has positioned us nicely to handle your project. We have assembled an experienced and efficient team to lead this undertaking. Our passion is invaluable, and we will not lose sight of the visitors and staff who occupy this space. We are mindful of sensitive issues such as diversity, inclusion, equity, social emotional learning, and The City of Fort Atkinson: Public Works Facility as whole. We take our responsibility seriously with great respect and enthusiasm for you and the work we provide.

Respectfully,

The EBi Team



source: city of fort atkinson website

PRODUCT INFORMATION

Page 3 – Specifications & Images

CLOSING

Page 43 – Thank You!



Product Information

Your Space. Our Business.

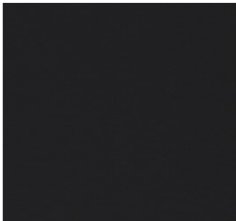
Lorell | GUEST CHAIR



FINISHES



CHAIR FABRIC
BLACK LEATHER



CHAIR FRAME
BLACK STEEL

CODE CH-1	Room Name ENTRY 101
LOCATION	Entry 101
MANUFACTURER	Lorell
SERIES	Chadwick
PROD. #	LLR60122
DESCRIPTION	4-Leg Executive Guest Chair, Sophisticated Look, Fully Upholstered
FINISH – SEAT & BACK	Black Leather Upholstery
FINISH - LEGS	Black Steel Frame
DIMENSIONS	Overall: 26"W x 28"D x 25"H

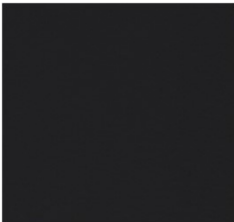
Lorell | SIT/STAND DESK



FINISHES



DESK LAMINATE
ESPRESSO



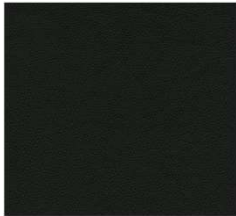
BASE FINISH
BLACK

CODE D-1	Room Name RECEPTION 102
LOCATION	Reception 102
MANUFACTURER	Lorell
SERIES	Active Office
PROD. #	LLR25970 (Base) & LLR18231 (Worksurface)
DESCRIPTION	60"W x 30"D Laminate Rectangle Worksurface & Three-Tier Electric Height Adjustable Base: Adjusts from 24" to 50" High.
FINISH – TOP	Espresso
FINISH - LEGS	Black
DIMENSIONS	60"W x 30"D x 24-50"H

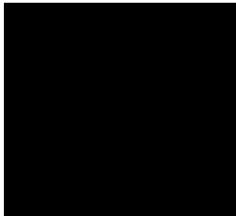
HON | ALTERN TASK CHAIR



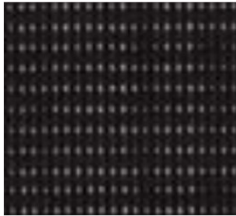
FINISHES



CHAIR FABRIC
BLACK



CHAIR FRAME
BLACK



MESH BACK
BLACK

CODE CH-2	Room Name MULTIPLE LOCATIONS
LOCATIONS	Reception 102, Office 105, Office 107, Office 108, Office 109, & Mechanic Office 130
MANUFACTURER	HON
SERIES	Altern
PROD. #	HPTCC1-T1UM
DESCRIPTION	Mid-Back Task Chair, Height & Width Adj. Arms, Mesh Back, Pneumatic – Swivel – Seat Slider –Tilt Tension/Lock, Adjustable Lumbar, and Hard Casters
FINISH – SEAT/MESH	Black Mesh Back with Black Seat Fabric
FINISH - LEGS	Black Frame/Base
DIMENSIONS	Overall: 27-7/8"W x 27-7/16"D x 39-11/16"H



FINISHES



MAT FINISH
CLEAR VINYL

CODE M-1	Room Name RECEPTION 102
LOCATION	Reception 102
MANUFACTURER	Duramat
SERIES	N/A
PROD. #	DEFCM13242
DESCRIPTION	Chair Mat, 45 x 54, Rectangle, Clear, Flat
FINISH – TOP	Clear Vinyl
DIMENSIONS	45" x 53"



CODE T-1	Room Name CONFERENCE 103
LOCATION	Conference Room 103
MANUFACTURER	OfficeSource
SERIES	N/A
PROD. #	SELP237 & OSTBPOWER
DESCRIPTION	10FT Boat Shaped Conf. Table w/ Accent Legs & Power Modules
FINISH – TOP	Espresso
FINISH - LEGS	Espresso W/ Silver Accent
DIMENSIONS	120"L x 47"D x 29.5"H

FINISHES



TABLE LAMINATE
ESPRESSO



TABLE BASE
ESPRESSO W/
SILVER ACCENT



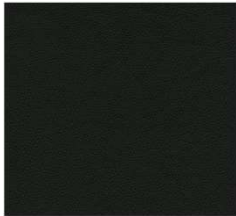
POWER MODULES
SILVER



(2) AC Outlets, (2) USB, (1) Data, (1) Phone, (1) HDMI with 8' power cord



FINISHES



CHAIR FABRIC
BLACK LEATHER



CHAIR FRAME
Elegant Silver

CODE CH-3	Room Name CONFERENCE 103
LOCATION	Conference 103
MANUFACTURER	Lorell
SERIES	N/A
PROD. #	LLR62620
DESCRIPTION	Classic Executive Office Chair w/ 5-Star Base
FINISH – SEAT/BACK	Black Leather
FINISH - LEGS	Elegant Silver
DIMENSIONS	Overall: 27.8"W x 30.1"D x 46.9"H



FINISHES



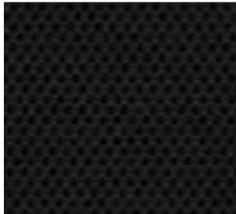
DESK LAMINATE
ESPRESSO

CODE D-2	Room Name MULTIPLE LOCATIONS
LOCATIONS	Office 105, Office 107, Office 108 & Office 109
MANUFACTURER	Lorell
SERIES	Essentials
PROD. #	LLR18211 (Desk Shell) & LLR18217 (Desk Bridge)
DESCRIPTION	72"x30" Desk Shell w/ Grommets & 48"x24" Bridge w/ 1 Center Grommet
FINISH – TOP	Espresso Laminate
FINISH - CHASSIS	Espresso Laminate
DIMENSIONS	72"W x 30"D x 29.5"H (Desk Shell) & 48"W x 24"D x 29.5"H (Bridge)

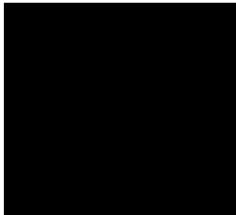
HON | LOTA GUEST CHAIR



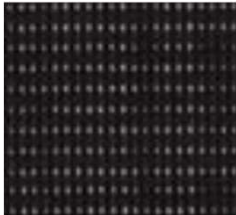
FINISHES



CHAIR FABRIC
BLACK



CHAIR FRAME
BLACK



MESH BACK
BLACK

CODE CH-4	Room Name MULTIPLE LOCATIONS
LOCATIONS	Office 105, Office 107, Office 108, & Office 109
MANUFACTURER	HON
SERIES	Lota
PROD. #	H2285
DESCRIPTION	Mid-Bk Multipurpose Chair w/ Arms, Mesh back, Stacking, Black Frame
FINISH – SEAT/MESH	Black Mesh Back with Black Fabric Seat
FINISH - LEGS	Black Frame/Base
DIMENSIONS	Overall: 23"W x 34-1/2"H x 24-3/4"D



FINISHES



CREDENZA
LAMINATE
ESPRESSO

CODE D-3	Room Name MULTIPLE LOCATIONS
LOCATIONS	Office 108 & Office 109
MANUFACTURER	Lorell
SERIES	Essentials
PROD. #	LLR18212
DESCRIPTION	Credenza Shell w/ 1 Center Grommet
FINISH – TOP	Espresso Laminate
FINISH - CHASSIS	Espresso Laminate
DIMENSIONS	70.9"W x 23.6"D x 29.5"H

Lorell | PERSONAL STORAGE CABINET



FINISHES



CREDENZA
LAMINATE
ESPRESSO

CODE S-1	Room Name MULTIPLE LOCATIONS
LOCATIONS	Office 108 & Office 109
MANUFACTURER	Lorell
SERIES	Essentials
PROD. #	LLR18229
DESCRIPTION	Tall Storage Cabinet – 2xFile Drawer(s) – 1 Door(s) – 2 Shelf(s), Locking Drawers
FINISH	Espresso Laminate
DIMENSIONS	23.6"D x 23.6"W x 65.5"H

Lorell | ACCESSORIES DRAWER



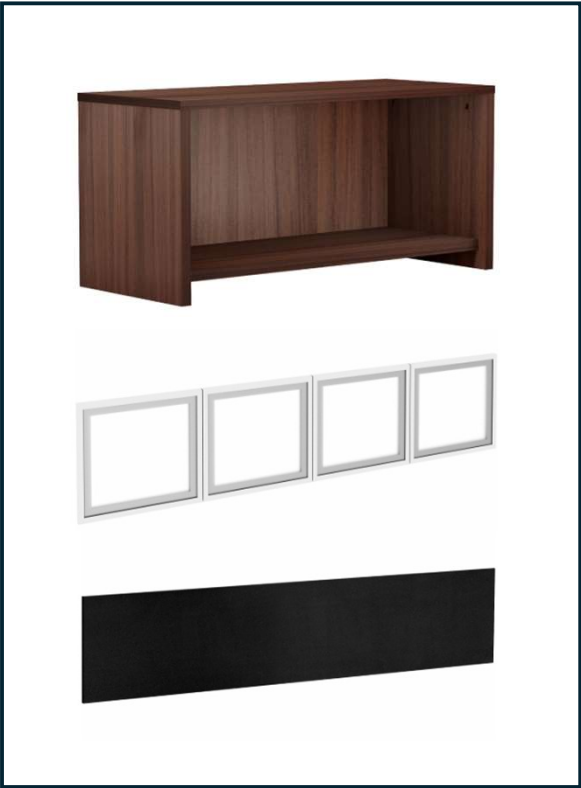
FINISHES



CREDENZA
LAMINATE
ESPRESSO

CODE S-2	Room Name MULTIPLE LOCATIONS
LOCATIONS	Office 108 & Office 109
MANUFACTURER	Lorell
SERIES	Essentials
PROD. #	LLR18224
DESCRIPTION	Universal Center Drawer
FINISH	Espresso Laminate
DIMENSIONS	28.4"D x 16.7"W x 5.1"H

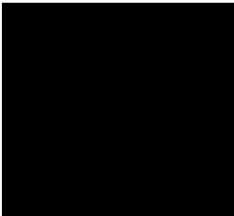
Lorell | WALLMOUNTED HUTCH W/ GLASS DOORS & TACKBOARD



FINISHES



CREDENZA
LAMINATE
ESPRESSO



TACKBOARD
FABRIC
BLACK

CODE S-3	Room Name MULTIPLE LOCATIONS
LOCATIONS	Office 108 & Office 109
MANUFACTURER	Lorell
SERIES	Essentials
PROD. #	LLR18240 (Hutch), LLR59713 (Doors), & LLR69914 (Tackboard)
DESCRIPTION	36" W Wall-Mounted Hutch w/ Add-on Glass Door Kit and Fabric Tackboard
FINISH – HUTCH	Espresso Laminate w/ Glass Door
FINISH - TACKBOARD	Back Fabric
DIMENSIONS	36"W x 15"D x 17"H (Hutch), 72"W (Glass Doors), & 16.50"H x 68.63"W (Tackboard)

Lorell | ROUND TABLE W/ BASE



FINISHES



TABLE LAMINATE
ESPRESSO

CODE T-2	Room Name MULTIPLE LOCATIONS
LOCATIONS	Office 108 & Office 109
MANUFACTURER	Lorell
SERIES	Essentials
PROD. #	LLR69990 (Tabletop) & LLR18257 (Table Base)
DESCRIPTION	42" Round Tabletop w/ Round Conference Table Base
FINISH – TOP	Espresso Laminate
FINISH - LEGS	Espresso Laminate
DIMENSIONS	42"W x 29"H

Lorell | FILE/FILE MOBILE PEDESTAL



FINISHES



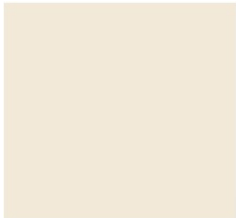
PEDESTAL
LAMINATE
ESPRESSO

CODE S-4	Room Name MULTIPLE LOCATIONS
LOCATIONS	Office 108 & Office 109
MANUFACTURER	Lorell
SERIES	Essentials
PROD. #	LLR18219
DESCRIPTION	File/File Mobile File Pedestal
FINISH	Espresso Laminate
DIMENSIONS	16"W x 22"D x 28.3"H

Uline | 36W TALL METAL CABINET STORAGE



FINISHES



STORAGE METAL
TAN

CODE S-5	Room Name SAFETY EQUIPMENT 113
LOCATION	Safety Equipment 113
MANUFACTURER	Uline
SERIES	Uline
PROD. #	H-1105T
DESCRIPTION	Industrial Storage Cabinet - Unassembled
FINISH	Tan
DIMENSIONS	36"W x 18"D x 72"H



FINISHES



METAL FINISH
CHROME

CODE S-6	Room Name SAFETY EQUIPMENT 113
LOCATION	Safety Equipment 113
MANUFACTURER	Uline
SERIES	Metro
PROD. #	H-6159
DESCRIPTION	Quick Adjust Wire Shelving
FINISH	Chrome
FINISH - LEGS	Chrome
DIMENSIONS	36"W x 18"D x 63"H

Uline | GARMENT STORAGE CENTER W/ SHELVES



FINISHES



METAL FINISH
CHROME

CODE S-7	Room Name SAFETY EQUIPMENT 113
LOCATION	Safety Equipment 113
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-2449
DESCRIPTION	Garment Storage Center w/ Shelves
FINISH	Chrome
DIMENSIONS	52"W x 18"D x 72"H

Lorell | 72W TRAINING TABLE W/ FLIP & NEST BASE



FINISHES



TABLETOP LAMINATE
ESPRESSO



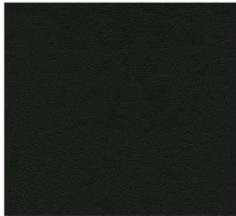
BASE FINISH
COLD-ROLLED STEEL

CODE T-3	Room Name BREAKROOM 118
LOCATION	Breakroom 118
MANUFACTURER	Lorell
SERIES	Relevance
PROD. #	LLR16199 (Tabletop) & LLR60738 (Table Base)
DESCRIPTION	71.6"W x 24"D Tabletop w/ Spry Nesting Training Table Base
FINISH – TOP	Espresso
FINISH - LEGS	Cold-rolled Steel
DIMENSIONS	71.6"W x 24"D x 29.5"H

Lorell | MESH BACK NESTING CHAIRS



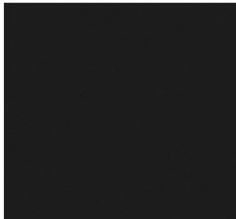
FINISHES



SEAT FABRIC
BLACK



MESH BACK
BLACK



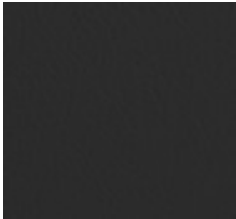
FRAME FINISH
BLACK

CODE CH-5	Room Name BREAKROOM 118
LOCATION	Breakroom 118
MANUFACTURER	Lorell
SERIES	N/A
PROD. #	LLR41846
DESCRIPTION	Mobile Mesh Back Nesting Chairs (2/Carton)
FINISH – SEAT/BACK	Black Fabric & Black Mesh Back
FINISH - LEGS	Black
DIMENSIONS	Overall: 35.4"H x 20.3"W x 22.9"D

HON | PARKWYN SOFA



FINISHES



SEAT FABRIC
BLACK



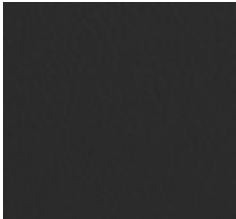
LEG FINISH
BLACK

CODE L-1	Room Name BREAKROOM 118
LOCATION	Breakroom 118
MANUFACTURER	HON
SERIES	Parkwyn
PROD. #	HVLVL3
DESCRIPTION	Three Seat Sofa Lounge
FINISH – SEAT/BACK	Black Polyurethane Fabric
FINISH - LEGS	Black
DIMENSIONS	Overall: 77"W x 30"H x 26-3/4"D

HON | PARKWYN SINGLE LOUNGE SEAT



FINISHES



SEAT FABRIC
BLACK



LEG FINISH
BLACK

CODE L-2	Room Name BREAKROOM 118
LOCATION	Breakroom 118
MANUFACTURER	HON
SERIES	Parkwyn
PROD. #	HVLVL1
DESCRIPTION	Singe Seat Club Chair Lounge
FINISH – SEAT/BACK	Black Polyurethane Fabric
FINISH - LEGS	Black
DIMENSIONS	Overall: 33"W x 26-3/4"D x 30"H

HON | BETWEEN ROUND TABLE W/ DISC BASE



FINISHES



TABLE LAMINATE
MOCHA



BASE FINISH
CHARBLACK

CODE T-4	Room Name BREAKROOM 118
LOCATION	Breakroom 118
MANUFACTURER	HON
SERIES	Between
PROD. #	HBTTTRND30 (Round Top) & HBTTD30 (Disc Base)
DESCRIPTION	Round Tabletop w/ Disc Base
FINISH – TOP	Mocha
FINISH - BASE	Charblack
DIMENSIONS	30"W x 29"H

HON | OCCASIONAL END TABLE



FINISHES



TABLE LAMINATE
MOCHA

CODE T-5	Room Name BREAKROOM 118
LOCATION	Breakroom 118
MANUFACTURER	HON
SERIES	Occasional Tables
PROD. #	H80193
DESCRIPTION	Square End Table
FINISH – TOP	Mocha
FINISH - LEGS	Mocha
DIMENSIONS	24"W x 20"D x 20"H

HON | OCCASIONAL COFFEE TABLE



FINISHES



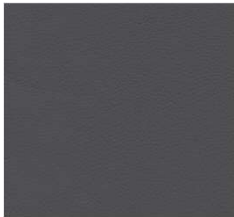
TABLE LAMINATE
MOCHA

CODE T-6	Room Name BREAKROOM 118
LOCATION	Breakroom 118
MANUFACTURER	HON
SERIES	Occasional Tables
PROD. #	H80191
DESCRIPTION	Rectangle Coffee Table
FINISH – TOP	Mocha
FINISH - LEGS	Mocha
DIMENSIONS	48"W x 20"D x 16"H

HON | MOTIVATE NEST/STACK CHAIR W/ POLY BACK & UPH SEAT



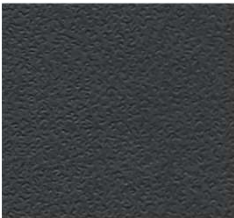
FINISHES



SEAT FABRIC
CONTOURETTE -
GRAPHITE



LEG FINISH
CHARBLACK



POLY SHELL BACK
LAVA

CODE CH-6	Room Name BREAKROOM 118
LOCATION	Breakroom 118
MANUFACTURER	HON
SERIES	Motivate
PROD. #	HMN2
DESCRIPTION	Nest/Stack Chair – Flex Poly back – UPH Seat
FINISH – SEAT	Contourette – Graphite Fabric: Grade 1
FINISH - BACK	Lava Poly
FINISH – LEGS	Charblack
DIMENSIONS	30" x 30"H

HON | ASTIR LOW BACK BANQUETTE LOUNGE



CODE L-3	Room Name BREAKROOM 118
LOCATION	Breakroom 118
MANUFACTURER	HON
SERIES	Astir
PROD. #	HASHB2 & HASGSBL
DESCRIPTION	Two Seat Lounge – High Back w/ Ganging Hardware
FINISH – KNIT SCREEN	Knit Dark Pewter
FINISH – SEAT/BACK	Notion – Rockfall: Grade 3
FINISH – LEGS	Mocha Wood
DIMENSIONS	Overall: 54"H x 28-1/4"D x 56-1/2"W (x2 to create 113"W)

FINISHES



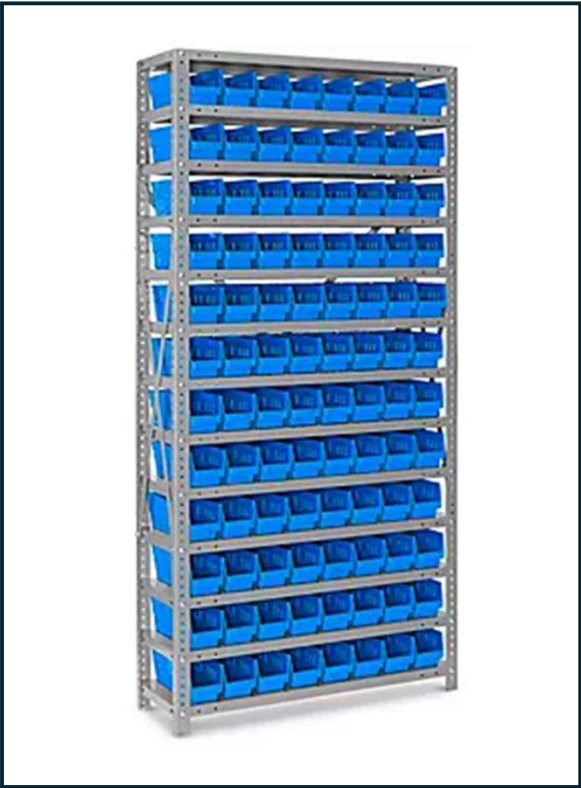
SEAT FABRIC
NOTION -
ROCKFALL



KNIT SCREEN
DARK PEWTER



LEG WOOD
MOCHA



FINISHES



BIN FINISH
BLUE



FRAME
STEEL

CODE S-7	Room Name PAINT AND SIGN STORAGE 121
LOCATIONS	Paint and Sign Storage 121
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-1772BLU
DESCRIPTION	Shelf Bin Organizer w/ 4 x 12 x 4" Bins
FINISH – BINS	Blue
FINISH – FRAME	Steel
DIMENSIONS	36"W s 12"D s 75"H

Uline | VERTICAL BAR RACK



FINISHES



POWDER COATED
FINISH
BLUE

CODE S-8	Room Name PAINT AND SIGN STORAGE 121
LOCATION	Paint and Sign Storage 121
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-4888
DESCRIPTION	Vertical Bar Rack
FINISH – FRAME	Blue Powder Coated Finish
DIMENSIONS	36"W x 24"D x 85"H

Uline | PALLET RACK WIRE DECKING



FINISHES



FRAME
GALVANIZED
STEEL

CODE S-9	Room Name MULTIPLE LOCATIONS
LOCATIONS	Paint and Sign Storage 121, Parts 126, Cold Storage 134, Garage Mezzanine 201, & Parts Mezzanine 202
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-5724
DESCRIPTION	Pallet Rack Wire Decking
FINISH – FRAME	Galvanized Steel
DIMENSIONS	46"W x 42"D

Uline | ASSEMBLY TABLE WITH BOTTOM SHELF



FINISHES



FRAME/TOP
STEEL

CODE S-10	Room Name PAINT AND SIGN STORAGE 121
LOCATION	Paint and Sign Storage 121
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-7698S
DESCRIPTION	Steel Assembly Table with Bottom Shelf, Adj. height
FINISH – TOP	Steel
FINISH – LEGS	Steel
DIMENSIONS	72"W x 48"W x 28-48"H

Uline | METAL CABINET STORAGE 30W



FINISHES



FRAME
GRAY

CODE S-11	Room Name PARTS 126
LOCATION	Parts 126
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-8447GR
DESCRIPTION	Metal Cabinet Storage 30"W
FINISH – FRAME	Gray
DIMENSIONS	30"W x 18"D x 72"H

Uline | TWO-SHELF PALLET RACK STARTER UNIT



FINISHES



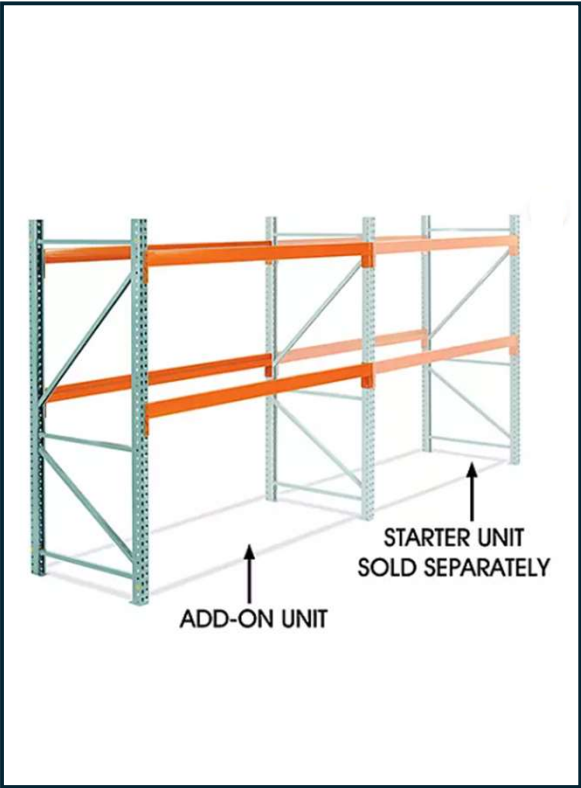
FRAME
STEEL



BEAM FINISH
ORANGE

CODE S-12	Room Name MULTIPLE LOCATIONS
LOCATIONS	Parts 126, Cold Storage 134, Garage Mezzanine 201, & Parts Mezzanine 202
MANUFACTURER	Uline
SERIES	Interlake
PROD. #	H-5715
DESCRIPTION	Two-Shelf Pallet Rack Starter Unit
FINISH – FRAME	Steel
FINISH – BEAM	Orange
DIMENSIONS	96"W x 42"D x 96"H

Uline | ADD-ON PALLET RACKING FOR H-5715 STARTER UNIT



FINISHES



FRAME
STEEL



BEAM FINISH
ORANGE

CODE S-12	Room Name MULTIPLE LOCATIONS
LOCATIONS	Cold Storage 134, Garage Mezzanine 201, & Parts Mezzanine 202
MANUFACTURER	Uline
SERIES	Interlake
PROD. #	H-5715-ADD
DESCRIPTION	Add-On Unit for Two-Shelf Pallet Rack
FINISH – FRAME	Steel
FINISH – BEAM	Orange
DIMENSIONS	96"W x 42"D x 96"H

Uline | TWO-SHELF WIRE SHELVING UNIT



FINISHES



METAL FINISH
CHROME

CODE S-13	Room Name PARTS 126
LOCATION	Parts 126
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-10711-96
DESCRIPTION	Two-Shelf Wire Shelving Unit
FINISH – FRAME	Chrome
DIMENSIONS	42"W x18"D x 34"H

Uline | CANTILEVER RACK – SINGLE SIDED



FINISHES



FRAME
STEEL

CODE S-14	Room Name COLD STORAGE 134
LOCATIONS	Cold Storage 134
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-3845
DESCRIPTION	Cantilever Rack – Single Sided
FINISH – FRAME	Steel
DIMENSIONS	56"W x 40"D x 96"H

Uline | FLAMMABLE STORAGE CABINET



FINISHES



FRAME
YELLOW

CODE S-15	Room Name COLD STORAGE 134
LOCATION	Cold Storage 134
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-1564M-Y
DESCRIPTION	Standard Flammable Storage Cabinet – Manual Doors, 45 Gallon
FINISH – FRAME	Yellow
DIMENSIONS	43"W x 18"D x 65"H

Uline | INDUSTRIAL OFFICE DESK



FINISHES



TOP
GRAY



BASE
BLACK

CODE D-4	Room Name MECHANIC OFFICE 130
LOCATION	Mechanic Office 130
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-11146
DESCRIPTION	Single Pedestal Industrial Office Desk
FINISH – TOP	Gray
FINISH – BASE	Black
DIMENSIONS	48"W x 24"D x 29.5"H

Uline | TWO-SHELF PALLET RACK STARTER UNIT



FINISHES



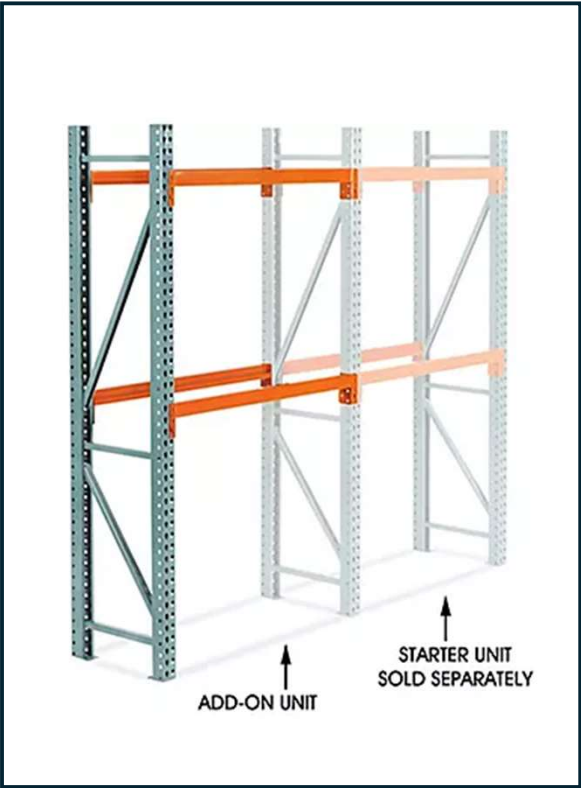
FRAME
STEEL



BEAM FINISH
ORANGE

CODE S-16	Room Name PARTS MEZZANINE 202
LOCATION	Parts Mezzanine 202
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-8610
DESCRIPTION	Two-Shelf Pallet Rack Starter Unit
FINISH – FRAME	Steel
FINISH – BEAM	Orange
DIMENSIONS	48"W x 24"D x 96"H

Uline | ADD-ON UNIT FOR TWO-SHELF PALLET RACK



FINISHES



FRAME
STEEL



BEAM FINISH
ORANGE

CODE S-16	Room Name PARTS MEZZANINE 202
LOCATION	Parts Mezzanine 202
MANUFACTURER	Uline
SERIES	N/A
PROD. #	H-8610-ADD
DESCRIPTION	Add-On Unit for Two-Shelf Pallet Rack
FINISH – FRAME	Steel
FINISH – BEAM	Orange
DIMENSIONS	48"W x 24"D x 96"H

Closing | THANK YOU!

THANK YOU
FOR CONSIDERING US!

Thank you!

On behalf of our entire EBi team, we look forward to helping you create and accomplish your goals for the City of Fort Atkinson: Public Works Facility.

Deb Deuster

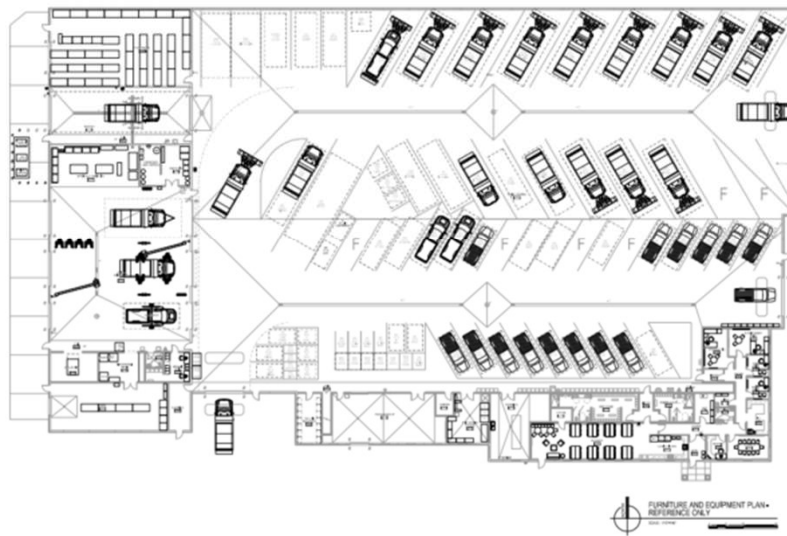
Account Manager
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Patti Lemkuil

Director of Business Development
847-302-7671
pattil@ebiweb.com

Cassidy Becker

Interior Designer II
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cassidyb@ebiweb.com



REVISIONS		
NO.	DATE	DESCRIPTION
1	10/1/14	ISSUED FOR PERMIT
2	10/1/14	ISSUED FOR PERMIT
3	10/1/14	ISSUED FOR PERMIT
4	10/1/14	ISSUED FOR PERMIT
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PROJECT NUMBER: 100-00

APPROVED BY: JJS

REVIEWED BY: JJS

DRAWN BY: JJS

FURNITURE AND EQUIPMENT PLAN

A904

source: angus-young architects|engineers

FF&E BUDGET ALLOWANCES

PROJECT NAME: CoFort Atkinson - Public Works Facility
 PROJECT NUMBER: 76131
 DATE: 11/18/2024
 REVISED:

BIDDING DEALER: CJ & ASSOCIATES, INC.



Janesville | Madison | Rockford
 angusyoung.com
 608.756.2326

BUILDING AREA AND PRODUCT	MANUFACTURER (Basis of Design)	PRODUCT CODE	TOTAL LIST PRICE	QUANTITY	DISCOUNT %	TOTAL PRICE	NOTES
ENTRY 101							
Single Guest/Side Chair	Offices To Go (Global) #OTG3918B		\$550	2		\$ 240.00	Black upholstery; 4-legged base
RECEPTION 102							
60"x30" Sit/Stand Desk	Performance Office Furnishings (Storlie/Harmony) #PLT3060/PLTEAB4872E3S2MWF24		\$1,367	1		\$ 543.00	
Task Seating (Mesh Back/Upholstered Seat)	Performance Office Furnishings (Storlie/Harmony) #15301		\$360	1		\$ 143.00	Includes lumbar, adj. height/seat/arms, tilt/locking
Chair Mat	Performance Office Furnishings (Storlie/Harmony) #122173		\$172	1		\$ 69.00	
CONFERENCE 103							
120" Boat Shaped Table w/ Integrated Power Supply	Performance Office Furnishings (Storlie/Harmony) #CLPBS4238N		\$2,593	1		\$ 1,035.00	144"x33-48" Boat Shaped Table with cord management
Power Module	Harmony Collection PLT-BPOWER		\$1,340	2		\$ 532.00	(2) AC Outlets, (2) USB, (1) USB data, (1) data, (1) phone (1) HDMI with 8' power cord
Executive Seating (Tufted Seat/Back)	Offices To Go (Global) # OTG117768		\$3,840	12		\$ 1,668.00	Black Luxhide with casters
OFFICE 105							
72"x30" Desk Shell (Laminate)	Performance Office Furnishings (Storlie/Harmony) #PL105/PL145L		\$818	1		\$ 325.00	
48"x24" Desk Bridge (Laminate)				1		Incl.	
Task Seating (Mesh Back/Upholstered Seat)	Performance Office Furnishings (Storlie/Harmony) #15301		\$360	1		\$ 143.00	Includes lumbar, adj. height/seat/arms, tilt/locking
Side/Guest Chair (Mesh Back/Upholstered Seat)	Performance Office Furnishings (Storlie/Harmony) #88711		\$600	2		\$ 240.00	w/ Arms
OFFICE 107							
72"x30" Desk Shell (Laminate)	Performance Office Furnishings (Storlie/Harmony) #PL105/PL145L		\$818	1		\$ 325.00	
48"x24" Desk Bridge (Laminate)				1		Incl.	
Task Seating (Mesh Back/Upholstered Seat)	Performance Office Furnishings (Storlie/Harmony) #15301		\$360	1		\$ 143.00	Includes lumbar, adj. height/seat/arms, tilt/locking
Side/Guest Chair (Mesh Back/Upholstered Seat)	Performance Office Furnishings (Storlie/Harmony) #88711		\$600	2		\$ 240.00	w/ Arms
OFFICE 108							
72"x30" Desk Shell (Laminate)	Performance Office Furnishings (Storlie/Harmony) #PL105		\$501	1		\$ 199.00	
48"x24" Desk Bridge (Laminate)	PL170		\$265	1		\$ 106.00	
72"x24" Credenza Shell (Laminate)	PL143		\$452	1		\$ 180.00	
24"x24"x66" Personal Cabinet (Laminate)	PL207		\$1,287	1		\$ 511.00	
Accessories/Drawer	CDR1		\$97	1		\$ 39.00	
26"x15" Wall Mount Hutch (Laminate)	PL20440H		\$641	2		\$ 255.00	
Glass Hutch Doors	PL44SGD_CD/PL44SGD_OD		\$414	2		\$ 166.00	
69"x16.5" Wall Mount Tack Board	PL118CHAR		\$167	1		\$ 67.00	
42" Round Tabletop (Laminate) WITH BASE	PLT42R/PLTXBM33 (Base)		\$586	1		\$ 234.00	Include Table/Base
Mobile File Pedestal (Laminate)	PL1007		\$452	1		\$ 180.00	
Task Seating (Mesh Back/Upholstered Seat)	Performance Office Furnishings (Storlie/Harmony) #15301		\$360	1		\$ 143.00	Includes lumbar, adj. height/seat/arms, tilt/locking

BUILDING AREA AND PRODUCT	MANUFACTURER (Basis of Design)	PRODUCT CODE	TOTAL LIST PRICE	QUANTITY	DISCOUNT %	TOTAL PRICE	NOTES
Side/Guest Chair (Mesh Back/Upholstered Seat)	Performance Office Furnishings (Storlie/Harmony) #88711		\$900	3		\$ 360.00	w/ Arms
OFFICE 109							
72"x30" Desk Shell (Laminate)	Performance Office Furnishings (Storlie/Harmony) #PL105		\$501	1		\$ 199.00	
48"x24" Desk Bridge (Laminate)	PL170		\$265	1		\$ 106.00	
72"x24" Credenza Shell (Laminate)	PL143		\$452	1		\$ 180.00	
24"x24"x66" Personal Cabinet (Laminate)	PL207		\$1,287	1		\$ 511.00	
Accessories/Drawer	CDR1		\$97	1		\$ 39.00	
26"x15" Wall Mount Hutch (Laminate)	PL20440H		\$641	2		\$ 255.00	
Glass Hutch Doors	PL44SGD_CD/PL44SGD_OD		\$414	2		\$ 166.00	
69"x16.5" Wall Mount Tack Board	PL118CHAR		\$167	1		\$ 67.00	
42" Round Tabletop (Laminate)	PLT42R/PLTXBM33 (Base)		\$586	1		\$ 234.00	Include Table/Base
Mobile File Pedestal (Laminate)	PL1007		\$452	1		\$ 180.00	
Task Seating (Mesh Back/Upholstered Seat)	Performance Office Furnishings (Storlie/Harmony) #15301		\$360	1		\$ 143.00	Includes lumbar, adj. height/seat/arms, tilt/locking
Side/Guest Chair (Mesh Back/Upholstered Seat)	Performance Office Furnishings (Storlie/Harmony) #88711		\$900	3		\$ 360.00	w/ Arms
SAFETY EQUIPMENT 113							
Cabinet Storage 36"Wx18"Dx72"H	Uline H1105-T		\$920	1		\$ 571.00	
Chrome Wire Shelving 36"Wx18"Dx63"H	Uline H6159		\$770	1		\$ 478.00	
Garment Storage Center w/ Shelves	Uline H2449		\$510	1		\$ 317.00	
BREAKROOM 118							
72"x24" Training Table - TOP ONLY	Performance Furnishings (Storlie/Harmony)	PLT2472	\$4,032	16		\$ 1,600.00	
Flip/Nest Training Table Base	Offices To Go (Global)	OTGFBASE71	\$7,888	16		\$ 3,424.00	
Modesty Panel	Offices To Go (Global) - part of the base		INCLUDED	16		included	
Nesting Training Chairs (Mesh Back/Upholstered Seat)	Performance Furnishings (Storlie/Harmony)	3274T	\$18,800	50		\$ 7,500.00	w/ Casters
74" Sofa (Grade 3 Upholstery)	Global - Citi Square	S7877	\$3,351	1		\$ 1,542.00	
Single Lounge Seat (Grade 3 Upholstery)	Global - Citi Square	S7875	\$3,658	2		\$ 1,684.00	
30"Hx30"Dia. Table (Laminate)	Performance Furnishings (Storlie/Harmony)	PLT30R/PLTRBPOST2 88BLK	\$688	2		\$ 548.00	Include Disc. Metal Leg
Side Chair (Upholstered Seat/Poly Back)	Gobal - Rebound	R5NPUG	\$3,355	5		\$ 1,545.00	
Banquette Seating (Grade 3 Upholstery Seat/Back)	Global - Citi Square	S7897	\$6,490	2		\$ 2,986.00	Approx. 120"x72"
Side Table (Laminate)	Performance Furnishings (Storlie/Harmony)	PL220	\$306	1		\$ 122.00	
Coffee Table (Laminate)	Performance Furnishings (Storlie/Harmony)	PL219	\$431	1		\$ 172.00	
PAINT AND SIGN STORAGE 121							
Bin Storage 36"Wx12"Dx75"H	Uline 1772		\$1,600	2		\$ 992.00	
Roll Storage 36"Wx24"Dx45"H	Uline H4888		\$1,040	2		\$ 646.00	
Heavy Duty Shelf Unit 48"Wx24"Dx72"H	Uline H3913		\$6,360	6		\$ 3,948.00	
Steel Assembly Table w/ Bottom Shelf	Uline H7698S		\$1,340	1		\$ 831.00	
PARTS 126							
Cabinet Storage 30"Wx18"Dx72"H	Uline H8447		\$1,090	1		\$ 676.00	

BUILDING AREA AND PRODUCT	MANUFACTURER (Basis of Design)	PRODUCT CODE	TOTAL LIST PRICE	QUANTITY	DISCOUNT %	TOTAL PRICE	NOTES
Pallet Racking 96"Wx42"Dx96"H	Uline H5715		\$3,800	4		\$ 2,188.00	
Wire Shelving 42"Wx96"H	Uline H5724		\$280	4		\$ 176.00	For Pallet Rack
Wire Vertical Shelving 42"Wx96"H	Uline H10711		\$880	2		\$ 546.00	
COLD STORAGE 134							
Pallet Racking 96"Wx42"Dx96"H	Uline 5715		\$3,240	3		\$ 1,863.00	
Add On 96"Wx42"Dx96"	Uline 5715 Add		\$6,700	10		\$ 3,860.00	
Wire Shelving 42"Dx96"W	Uline H5724		\$1,680	24		\$ 1,056.00	
Cantilever Rack 56"Wx40"Dx96"H	Uline H3845		\$10,200	4		\$ 6,324.00	
Flammable Safety Cabinet 43"x18"x65"	Uline H1564M-Y		\$2,320	1		\$ 1,439.00	
MECHANIC OFFICE 130							
Industrial Office Desk	Uline H11146		\$2,540	2		\$ 1,576.00	Single Pedestal
Task Seating (Mesh Back/Upholstered Seat)	Performance Office Furnishings (Storlie/Harmony) #15301		\$720	2		\$ 286.00	Includes lumbar, adj. height/seat/arms, tilt/locking
GARAGE MEZZANINE 201							
Pallet Racking 96"Wx42"Dx96"H	Uline H5715		\$3,800	4		\$ 2,188.00	
Add On Unit 96"Wx42"Dx96"H	Uline H5715 ADD		\$5,360	8		\$ 3,088.00	
Wire Shelving 42"Dx96"W	Uline H5724		\$1,680	24		\$ 1,056.00	
PARTS MEZZANINE 202							
Tire Racking 48"Wx24"Dx96"H	Uline H8610		\$730	1		\$ 453.00	
Add On Unit 48"Wx24"Dx96"H	Uline H8610 ADD		\$920	2		\$ 572.00	
Pallet Racking 96"Wx42"Dx96"H	Uline H5715		\$1,900	2		\$ 1,094.00	
Add On Unit 96"Wx42"Dx96"H	Uline H5715 ADD		\$2,680	4		\$ 1,544.00	
Wire Shelving 42"Dx96"W	Uline H5724		\$840	12		\$ 528.00	
FF&E - BUDGET SUB TOTAL (PRODUCT ONLY)						\$ 69,945.00	
Sales Tax			Updated Rate Here:			\$ -	Assumption is that the municipality is Tax Exempt
Freight (Estimate)			Updated Rate Here:			\$ 683.40	
Installation (Estimate)			Updated Rate Here:			\$ 19,545.00	This installation price is for Pallet Racking product only, (as specified herein) and includes all anchors for concrete mounting. All other furniture prices include delivery & installation by CJ & Associates. PLEASE NOTE: Owner assistance with a forklift is required to get pallet racking to mezzanine level. If not available, we will need to rent one for 4 hour minimum = additional \$2,760.00
FF&E - BUDGET GRAND TOTAL						\$ 90,173.40	



Proposal for:

Project Location:

24593 City of Fort Atkinson - Public Works Building

CJ & Associates, Inc. is pleased to present this proposal for the above referenced project. Our proposal is offered with and governed by the enclosed terms.

	Mfg.	Qty.	Product	Sell	Ext Sell
BREAKROOM 118					
	PWC	50	3274T Agenda Armless Nesting Chair, Stocked in Black Back with Grey, Orange, Green, Red, Blue or Black Fabric Seat	\$150.00	\$7,500.00
	OTG	16	OTGFTBASE71 OTG Flip Top Base Only, 71", Used with SL7124TOP OR SL7130TOP, (Black or Tungsten) OTG LAMINATE SUPERIOR	\$214.00	\$3,424.00
			Base Finish {20} Base Finish {F1}	~OTG ?	Base Finish ----- UNSELECTED -----
	PWC	1	PL219 Coffee Table 48" x 20" x 16"H	\$172.00	\$172.00
			LAMINATE SELECTION	?	----- UNSELECTED -----
	PWC	1	PL220 End Table 24" x 24" x 20"H	\$122.00	\$122.00
			LAMINATE SELECTION	?	----- UNSELECTED -----

	Mfg.	Qty.	Product	Sell	Ext Sell
	PWC	16	PLT2472 Rectangular Top 24"D X 72"W	\$100.00	\$1,600.00
			LAMINATE SELECTION	?	----- UNSELECTED -----
	PWC	2	PLT30R Round Table Top 30"	\$77.00	\$154.00
			LAMINATE SELECTION	?	----- UNSELECTED -----
	PWC	2	PLTRBPOST28BLK Round Metal Base, 28.5"h	\$197.00	\$394.00
	GUS	5	R5NPUG REBOUND, Armless, Fabric Seat & Polypropylene Back, Std 4 Legged Base, Glides, Stack 5 High on Floor, 10 High on Dolly, GLOBAL SEATING USA	\$309.00	\$1,545.00
			Back and Seat Finish {20}	?	----- UNSELECTED -----
			Textile Seat {10 10}	~02	Grade 02
			Grade 02 Textile {GR}	?	----- UNSELECTED -----
			Graded In Grade 02 Textile - {FR}	GMP2	2-Graded in Grade 02 Fabrics
			Frame Finish {45}	?	----- UNSELECTED -----
			Glide Type {65}	FG	C-Felt Glide for Most Hard Floor Surfaces
			Commercial or GSA Offering	~STD	Non-GSA (Commercial Furniture Offering)
	GUS	2	S7875 CITI SQUARE, Fabric or Leather, 31"d x 30.375"w x 30"h, Lounge Chair, Std 2 Arms, Std with Square Metal Legs, GLOBAL SEATING USA	\$842.00	\$1,684.00
			Textile {10 04}	~03	Grade 03
			Grade 03 Textile {GR}	?	----- UNSELECTED -----
			Graded In Grade 03 Textile {FR}	GPM3	1-Graded In Grade 03 Fabrics
			Leg Finish {50}	?	----- UNSELECTED -----
			Seat Foam Type {20}	RF	M-Regular Foam
			Commercial or GSA Offering	~STD	Non-GSA (Commercial Furniture Offering)

	Mfg.	Qty.	Product	Sell	Ext Sell
	GUS	1	S7877	\$1,542.00	\$1,542.00
			CITI SQUARE, Fabric or Leather, 31"d x 73.125"w x 30"h, 3 Seat Sofa, Std 2 Arms, Std with Square Metal Legs, GLOBAL SEATING USA		
			Textile {10 04}	~03	Grade 03
			Grade 03 Textile {GR}	?	----- UNSELECTED -----
			Graded In Grade 03 Textile {FR}	GPM3	1-Graded In Grade 03 Fabrics
			Leg Finish {50}	?	----- UNSELECTED -----
			Seat Foam Type {20}	RF	M-Regular Foam
			Commercial or GSA Offering	~STD	Non-GSA (Commercial Furniture Offering)

	GUS	2	S7897	\$1,493.00	\$2,986.00
			CITI SQUARE, Fabric or Leather, 31"d x 64.125"w x 30.75"h, 3 Seat Sofa, Armless, Can Gang on Either Side, Std with Square Metal Legs, GLOBAL SEATING USA		
			Textile {10 04}	~03	Grade 03
			Grade 03 Textile {GR}	?	----- UNSELECTED -----
			Graded In Grade 03 Textile {FR}	GPM3	1-Graded In Grade 03 Fabrics
			Leg Finish {50}	?	----- UNSELECTED -----
			Seat Foam Type {20}	RF	M-Regular Foam
			Commercial or GSA Offering	~STD	Non-GSA (Commercial Furniture Offering)

Subtotal: BREAKROOM 118

\$21,123.00

COLD STORAGE 134

	ULI	1	H-1564M-Y	\$1,439.00	\$1,439.00
			Standard Flammable Storage Cabinet - Manual Doors, Yellow, 45 Gallon		
	ULI	4	H-3845	\$1,581.00	\$6,324.00
			Cantilever Rack - Single Sided, 56x40x96		
	ULI	32	H-3851	\$0.00	\$0.00
			Arm with Lip for Cantilever Racks - 24" - Part of Kit		

	Mfg.	Qty.	Product	Sell	Ext Sell
	ULI	8	H-3852 96" Column for Cantilever Rack - Part of Kit	\$0.00	\$0.00
	ULI	16	H-3853 40" Single-Sided Cantilever Base - Part of Kit	\$0.00	\$0.00
	ULI	4	H-3855 48" One Bar Support Brace Set - Part of Kit	\$0.00	\$0.00
	ULI	8	H-3857 Cantilever Hardware for 40" - Part of Kit	\$0.00	\$0.00
	ULI	3	H-5715 Two-Shelf Pallet Rack Starter Unit - 96x42x96	\$621.00	\$1,863.00
	ULI	10	H-5715-ADD Add-on Unit for Two-Shelf Pallet Rack - 96x42x96	\$386.00	\$3,860.00
	ULI	10	H-5719 Pallet Rack Additional Uprights - 42x96 - Part of Kit	\$0.00	\$0.00

	Mfg.	Qty.	Product	Sell	Ext Sell
	ULI	6	H-5719 Pallet Rack Additional Uprights - 42x96 - Part of Kit	\$0.00	\$0.00
	ULI	12	H-5723 96" Pallet Rack Beam - Part of Kit	\$0.00	\$0.00
	ULI	40	H-5723 96" Pallet Rack Beam - Part of Kit	\$0.00	\$0.00
	ULI	24	H-5724 Pallet Rack Wire Decking - 46"w x 42"d	\$44.00	\$1,056.00
Subtotal: COLD STORAGE 134				\$14,542.00	

CONFERENCE 103

	TTA	1	ATRC10 Rail Mount Cable Manager, 10 Units	\$66.00	\$66.00
	PWC	1	CLPBS4238N Boat Shaped Laminate Conference Table with Accent Bases, 144"w x 33-48"d	\$969.00	\$969.00



Mfg.	Qty.	Product	Sell	Ext Sell
OTG	12	OTG11776B Blk Luxhide w/ Mock Leather Trim, Single Position Tilt Lock w/ Tilt Adjustment, Pneumatic Seat HT Adj, Fixed Height Molded Arms, Molded Black Base, Dual Wheel Carpet Casters, OTG LUXHIDE	\$139.00	\$1,668.00



PWC	2	PLTBPOWER Power Module Features 2 USB Charging Ports, 1 USB 3.0 Data Port, 1 HDMI 2.0 1 RJ45 cat 6 Data Port, 1 RJ11 Phone Port and 2 Power Outlets	\$266.00	\$532.00
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Subtotal: CONFERENCE 103

\$3,235.00

ENTRY 101



OTG	2	OTG3918B Black Fabric Back & Seat, Fixed Arms, 4 Legged Base, Glides, OTG GUEST & STACK	\$120.00	\$240.00
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Subtotal: ENTRY 101

\$240.00

GARAGE MEZZANINE 201



ULI	4	H-5715 Two-Shelf Pallet Rack Starter Unit - 96x42x96	\$547.00	\$2,188.00
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ULI	8	H-5715-ADD Add-On Unit for Two-Shelf Pallet Rack - 96x42x96	\$386.00	\$3,088.00
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ULI	8	H-5719 Pallet Rack Additional Uprights - 42x96 - Part of Kit	\$0.00	\$0.00
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Mfg.	Qty.	Product	Sell	Ext Sell
ULI	8	H-5719 Pallet Rack Additional Uprights - 42x96 - Part of Kit	\$0.00	\$0.00
ULI	16	H-5723 96" Pallet Rack Beam - Part of Kit	\$0.00	\$0.00
ULI	32	H-5723 96" Pallet Rack Beam - Part of Kit	\$0.00	\$0.00
ULI	24	H-5724 Pallet Rack Wire Decking - 46"w x 42"d	\$44.00	\$1,056.00
Subtotal: GARAGE MEZZANINE 201				\$6,332.00
MECHANIC OFFICE 130				
PWC	2	15301 Next Series, Next Mid-Back Ergonomic Task Chair, Black Mesh and Black Fabric Seat and Black Base	\$143.00	\$286.00
ULI	2	H-10809 24" Desk Side Frames & Drawer - Part of Kit	\$0.00	\$0.00



Mfg.	Qty.	Product	Sell	Ext Sell
ULI	2	H-11146 Single Pedestal Industrial Office Desk - 48x24, Gray Top, Black Base	\$788.00	\$1,576.00
ULI	2	H-11147 48x24 Desktop & Modesty Panel for Industrial Desk - Part of Kit	\$0.00	\$0.00
ULI	2	H-9732 24"d Pedestal File for Ind. Desk - Part of Kit	\$0.00	\$0.00

Subtotal: MECHANIC OFFICE 130

\$1,862.00

OFFICE 105

PWC	1	15301 Next Series, Next Mid-Back Ergonomic Task Chair, Black Mesh and Black Fabric Seat and Black Base	\$143.00	\$143.00
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PWC	2	88711 Daisy Stackable Guest Chair with Removalbe Arms, Stocked in Black Mesh Back with Black Fabric Seat and Black Frame, Casters	\$120.00	\$240.00
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PWC	1	PL105 Desk Shell, 71"W x 30"D	\$199.00	\$199.00
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LAMINATE SELECTION ? ----- UNSELECTED -----
GROMMET COLOR SELECTION ? ----- UNSELECTED -----



Mfg.	Qty.	Product	Sell	Ext Sell
PWC	1	PL145L Return reversable, 48"W x 24"D Left	\$126.00	\$126.00
		LAMINATE SELECTION	?	----- UNSELECTED -----
		GROMMET COLOR SELECTION	?	----- UNSELECTED -----

Subtotal: OFFICE 105

\$708.00

OFFICE 107

PWC	1	15301 Next Series, Next Mid-Back Ergonomic Task Chair, Black Mesh and Black Fabric Seat and Black Base	\$143.00	\$143.00
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PWC	2	88711 Daisy Stackable Guest Chair with Removalbe Arms, Stocked in Black Mesh Back with Black Fabric Seat and Black Frame, Casters	\$120.00	\$240.00
-----	---	--	----------	----------



PWC	1	PL105 Desk Shell, 71"W x 30"D	\$199.00	\$199.00
		LAMINATE SELECTION	?	----- UNSELECTED -----
		GROMMET COLOR SELECTION	?	----- UNSELECTED -----



PWC	1	PL145L Return reversable, 48"W x 24"D Left	\$126.00	\$126.00
		LAMINATE SELECTION	?	----- UNSELECTED -----
		GROMMET COLOR SELECTION	?	----- UNSELECTED -----

Subtotal: OFFICE 107

\$708.00

	Mfg.	Qty.	Product	Sell	Ext Sell
OFFICE 108					
	PWC	1	15301 Next Series, Next Mid-Back Ergonomic Task Chair, Black Mesh and Black Fabric Seat and Black Base	\$143.00	\$143.00
	PWC	3	88711 Daisy Stackable Guest Chair with Removalbe Arms, Stocked in Black Mesh Back with Black Fabric Seat and Black Frame, Casters	\$120.00	\$360.00
	PWC	1	CDR1 Center Drawer 21-1/4"W x 16-1/2"D	\$39.00	\$39.00
	PWC	1	PL1007 Locking Mobile Box/File Pedestal 16"W x 22.5D x 20.5H	\$180.00	\$180.00
	PWC	1	PL105 Desk Shell, 71"W x 30"D	\$199.00	\$199.00
			LAMINATE SELECTION	?	----- UNSELECTED -----
			GROMMET COLOR SELECTION	?	----- UNSELECTED -----
	PWC	1	PL118CHAR Tackboard for PL144OH - Charcoal Fabric	\$67.00	\$67.00

Mfg.	Qty.	Product	Sell	Ext Sell
PWC	1	PL143 Credenza Shell 71"W x 24"D	\$180.00	\$180.00
PWC	1	PL170 Bridge, 48"W x 24"D	\$106.00	\$106.00
PWC	1	PL2044OH Open Wall-Mounted 71"W x 15"D x 17"H	\$255.00	\$255.00
PWC	1	PL207 Combo Tower with Wardrobe 24"W x 24"D x 66"H	\$511.00	\$511.00
PWC	1	PL44SGD_CD Set of 2 Silver Framed Glass Doors for PL144OH, PL208OH and PL2044OH (Center doors)	\$83.00	\$83.00
PWC	1	PL44SGD_OD Set of 2 Silver Framed Glass Doors for PL144OH, and PL2044 (Outside doors)	\$83.00	\$83.00
PWC	1	PLT42R Round Table Top 42"	\$126.00	\$126.00

Mfg.	Qty.	Product	Sell	Ext Sell
PWC	1	PLTXBM33 Metal "X" base only - 33" spread, 29" high	\$108.00	\$108.00

Subtotal: OFFICE 108

\$2,440.00

OFFICE 109

PWC	1	15301 Next Series, Next Mid-Back Ergonomic Task Chair, Black Mesh and Black Fabric Seat and Black Base	\$143.00	\$143.00
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PWC	3	88711 Daisy Stackable Guest Chair with Removalbe Arms, Stocked in Black Mesh Back with Black Fabric Seat and Black Frame, Casters	\$120.00	\$360.00
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PWC	1	CDR1 Center Drawer 21-1/4"W x 16-1/2"D	\$39.00	\$39.00
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PWC	1	PL1007 Locking Mobile Box/File Pedestal 16"W x 22.5D x 20.5H	\$180.00	\$180.00
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PWC	1	PL105 Desk Shell, 71"W x 30"D	\$199.00	\$199.00
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LAMINATE SELECTION ? ----- UNSELECTED -----
GROMMET COLOR SELECTION ? ----- UNSELECTED -----

Mfg.	Qty.	Product	Sell	Ext Sell
PWC	1	PL118CHAR Tackboard for PL144OH - Charcoal Fabric	\$67.00	\$67.00
PWC	1	PL143 Credenza Shell 71"W x 24"D	\$180.00	\$180.00
PWC	1	PL170 Bridge, 48"W x 24"D	\$106.00	\$106.00
PWC	1	PL2044OH Open Wall-Mounted 71"W x 15"D x 17"H	\$255.00	\$255.00
PWC	1	PL207 Combo Tower with Wardrobe 24"W x 24"D x 66"H	\$511.00	\$511.00
PWC	1	PL44SGD_CD Set of 2 Silver Framed Glass Doors for PL144OH, PL208OH and PL2044OH (Center doors)	\$83.00	\$83.00
PWC	1	PL44SGD_OD Set of 2 Silver Framed Glass Doors for PL144OH, and PL2044 (Outside doors)	\$83.00	\$83.00

Mfg.	Qty.	Product	Sell	Ext Sell
PWC	1	PLT42R Round Table Top 42"	\$126.00	\$126.00

PWC	1	PLTXBM33 Metal "X" base only - 33" spread, 29" high	\$108.00	\$108.00
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Subtotal: OFFICE 109	\$2,440.00
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PAINT AND SIGN STORAGE 121

ULI	2	H-1770-POST Steel Posts & Cross Braces - 75" - Part of Kit	\$0.00	\$0.00
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ULI	2	H-1770-SHLF Shelves for Bin Organizer - Pack of 6, 36x12 - Part of Kit	\$0.00	\$0.00
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ULI	2	H-1770-SHLF2 Shelves for Bin Organizer - Pack of 7, 36x12	\$0.00	\$0.00
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ULI	2	H-1772BLU Shelf Bin Organizer 36x12x75 with 4x12x4 Bin Color TBD	\$496.00	\$992.00
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Mfg.	Qty.	Product	Sell	Ext Sell
ULI	6	H-3913 Heavy-Duty Steel Shelving - 48"w x 24"d x 72"h	\$658.00	\$3,948.00



ULI	2	H-4888 Vertical Bar Rack - 36x24x85	\$323.00	\$646.00
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ULI	1	H-7698S Steel ASsembly Table with Bottom Shelf - 72x48	\$831.00	\$831.00
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ULI	1	H-7698-SHELF 72x48 Assembly Table Shelf - Part of Kit	\$0.00	\$0.00
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ULI	1	H-7698T Steel Assembly Table Without Bottom Shelf - 72x48 - Part of Kit	\$0.00	\$0.00
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ULI	192	S-13396BLU Plastic Shelf Bins - 4x12x4 - Color TBD, Part of Kit	\$0.00	\$0.00
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Subtotal: PAINT AND SIGN STORAGE 121

\$6,417.00

	Mfg.	Qty.	Product	Sell	Ext Sell
PARTS 126					
	ULI	4	H-10475C Additional Chrome Wire Shelves - 42x18 - Part of Kit	\$0.00	\$0.00
	ULI	2	H-10711-96 Chrome Wire Shelving Unit - 42x18x96	\$273.00	\$546.00
	ULI	4	H-2936-POST Post for Chrome Wire Shelving - 96" - Part of Kit	\$0.00	\$0.00
	ULI	4	H-5715 Two-Shelf Pallet Rack Starter Unit - 96x42x96	\$547.00	\$2,188.00
	ULI	8	H-5719 Pallet Rack Additional Uprights - 42x96 - Part of Kit	\$0.00	\$0.00
	ULI	16	H-5723 96" Pallet Rack Beam - Part of Kit	\$0.00	\$0.00
	ULI	4	H-5724 Pallet Rack Wire Decking - 46"w x 42"d	\$44.00	\$176.00



Mfg.	Qty.	Product	Sell	Ext Sell
ULI	1	H-8447AGR Industrial Storage Cabinet - 30x18x72, Assembled, Gray - Please Confirm Color and Assembled or Unassembled	\$676.00	\$676.00

Subtotal: PARTS 126

\$3,586.00

PARTS MEZZANINE 202



ULI	2	H-5715 Two-Shelf Pallet Rack Starter Unit - 96x42x96	\$547.00	\$1,094.00
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ULI	4	H-5715-ADD Add-On Unit for Two Shelf Pallet Rack - 96x42x96	\$386.00	\$1,544.00
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ULI	4	H-5719 Pallet Rack Additional Uprights - 42x96 - Part of Kit	\$0.00	\$0.00
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ULI	4	H-5719 Pallet Rack Additional Uprights - 42x96 - Part of Kit	\$0.00	\$0.00
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ULI	16	H-5723 96" Pallet Rack Beam - Part of Kit	\$0.00	\$0.00
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	Mfg.	Qty.	Product	Sell	Ext Sell
	ULI	8	H-5723 96" Pallet Rack Beam - Part of Kit	\$0.00	\$0.00
	ULI	12	H-5724 Pallet Rack Wire Decking - 46"w x 42"d	\$44.00	\$528.00
	ULI	1	H-8610 Two-Shelf Pallet Rack Starter Unit - 48x24x96	\$453.00	\$453.00
	ULI	2	H-8610-ADD Add-on Unit for Two-Shelf Pallet Rack - 48x24x96	\$286.00	\$572.00
	ULI	4	H8615 24"d Pallet Rack Additional Uprights - 24x96 - Part of Kit	\$0.00	\$0.00
	ULI	2	H-8615 24"d Pallet Rack Additional Uprights - 24x96 - Part of Kit	\$0.00	\$0.00
	ULI	8	H-8616 Beam for Pallet Rack - 48" - Part of Kit	\$0.00	\$0.00

Mfg.	Qty.	Product	Sell	Ext Sell
ULI	4	H-8616 Beam for Pallet Rack - 48" - Part of Kit	\$0.00	\$0.00

Subtotal: PARTS MEZZANINE 202

\$4,191.00

RECEPTION 102

PWC	1	122173 45" x 53" w/Lip - Crystal Edge, Plastic Chair Mat	\$69.00	\$69.00
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PWC	1	15301 Next Series, Next Mid-Back Ergonomic Task Chair, Black Mesh and Black Fabric Seat and Black Base	\$143.00	\$143.00
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PWC	1	PLT3060 Rectangular Top 30"D x 60"W	\$116.00	\$116.00
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PWC	1	PLTEAB4872E3S2MWF24 Deluxe Electric Height Adjustable Table Base, 3 Stage Legs, 2 Motors, Height Range with Top 25.5" to 51", Weight Rating 265 #'s	\$427.00	\$427.00
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Subtotal: RECEPTION 102

\$755.00

SAFETY EQUIPMENT 113



ULI	1	H-1105T Industrial Storage Cabinet - 36x18x72, Unassembled, Tan	\$571.00	\$571.00
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Mfg.	Qty.	Product	Sell	Ext Sell
ULI	1	H-2449 Garment Storage Center with Shelves - 52x18x72	\$317.00	\$317.00



ULI	1	H-6159 Quick Adjust Wire Shelving 36x18x63 Chrome	\$478.00	\$478.00
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ULI	1	H-6159-SHELF Additional Quick Adjust Wire Shelves 36x18, Chrome - Part of Kit	\$0.00	\$0.00
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ULI	1	H-6163 63" Chrome Quick Adj. Posts - Part of Kit	\$0.00	\$0.00
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Subtotal: SAFETY EQUIPMENT 113	\$1,366.00
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Furniture Total:	\$69,945.00
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Estimated Uline Freight	\$683.40
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Project Total:	\$70,628.40
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This Proposal is valid for 30 days.

Delivery and installation is included in this proposal except as noted, and will take place during normal business hours unless described otherwise. Freight is estimated and is subject to change.

Payment Terms

1. Payment terms are 50% deposit due with order, net 30 days after project completion. Hold back/retainage allowed up to value of any open punchlist items.
2. A monthly service charge of 1.5% (18% per annum) will be charged on all past due account balances.
3. Credit card purchases are subject to a 5% processing fee.
4. All applicable taxes will be added at time of invoicing. Buyer will not be considered tax exempt without providing CJ & Associates, Inc. (CJA) with the appropriate resale or tax exempt certificates.
5. Upon request, the buyer agrees to submit CJA any credit information requested in order to properly approve this order.
6. Warehousing for product is complimentary for 30 days beyond the agreed to scheduled installation date. After that, a monthly rate of \$0.75 per square foot will be charged.
7. Unless otherwise stated in the sale proposal, buyer will be charged for common carrier freight charges and manufacturer surcharges.

Please sign & date for order approval.

Company Name

Customer Name

Date

We look forward to working with you on this project.

Please let me know if you have any questions or if I can be of further assistance.

Sincerely,

CJ & Associates, Inc



Roberta Montague
Director of New Business Development



CJ & Associates, Inc.
16915 W. Victor Road
New Berlin, WI 53151

Standard Terms and Condition of Sale

1. The proposal & drawing set must be approved, signed and dated by the client before order placement.
Any changes will be handled via an approved change order.
2. All proposed work will require the prior approval of the property owner, if applicable.
3. Installation is based on having the area free and clear, having adequate staging area and unimpeded access to the buildings elevator and dock.
4. Moving of existing furniture or electronics is not included, unless otherwise noted.
5. Project schedules will be based on manufacturer standard lead times for materials.
6. On direct shipments, not including installation, the Customer will receive and install. It will be the Customer's responsibility to inspect the merchandise and file freight claims. CJA cannot be held liable for cost of repairs and/or replacement of damaged goods.
7. This order may not be cancelled, unless agreed to in writing by management of CJA.
8. Terms inconsistent with those stated herein, which appear on purchaser's formal order, will not be binding to CJA.
9. This proposal is covered by CJ & Associates, Inc. Furniture Warranty.



Duet Resource Group

Phone: 414.273.3838

Email: orders@duetresourcegroup.com

224 S 1st Street

Milwaukee, WI 53204

www.duetresourcegroup.com

SOLD TO

CONTACT

Regional Director:

QUOTE

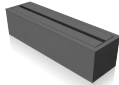
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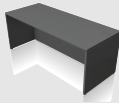
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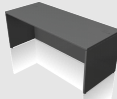
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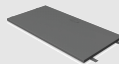
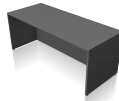
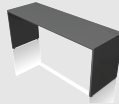
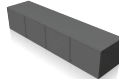
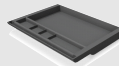
ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
101 Entry					
1		2	TEKNION UNIVERSAL NSIGXS Sitara Guest, Single Upholstery, Exposed Plastic Back	\$566.38	\$1,132.76
Sitara Guest Seat Finishes ~F03 Fabric Grade 3					
Seating Fabric Grade 3 ? ----- UNSELECTED -----					
Marl Cloth, Seating Fabric ? ----- UNSELECTED -----					
Arm Finish C9 Polished Aluminum					
Subtotal for: 101 Entry					\$1,132.76

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
102 Reception					
2		1	GORILLA GRIP Office Chair Mat for Carpet Floor, Slip Resistant Heavy Duty Under Desk Protector Carpeted Floors, No Divot Plastic Rolling Computer Mats, Smooth Glide Semi Transparent 48x32.5 Clear	\$69.40	\$69.40
3		1	TEKNION UNIVERSAL YSKB9E2958NNN hiSpace Slide HA FS Complete Table w/Rect WS,Ext.Elec(22.6-48.7"),No Scrn Frm,No Cutout,29"dx58"w Surface Finishes Foundation Laminate Edge Trim Style Edge Trim Colors Base Finish Switch Undersurface Cable Management Vertical Wire Carrier ~A ? 8 ? ? D N N Foundation Laminate ----- UNSELECTED ----- Flat Trim ----- UNSELECTED ----- ----- UNSELECTED ----- Display with Up/Down Memory None None	\$954.37	\$954.37
4		1	TEKNION UNIVERSAL NARNNW Around Synchro-Tilt Task Chair, Mesh Bk, Not Fully Assbld, No Hdrst, 2D Arms Around Mesh Back Finish Seat Upholstery Finish Seating Fabric Grade 1 Bitstream, Seating Fabric Seat Depth Adjustment Lumbar Element Cylinder Style Frame Finish Ebony Caster/ Glide Caster Finish A127 ~F01 ~05 B161 S Y 1 ~E 8B ~ 1 Black Fabric Grade 1 Bitstream Hardware With Seat Depth Adj. With Lumbar Element Standard Ebony Ebony Casters (Hard) Ebony	\$611.21	\$611.21
Subtotal for: 102 Reception					\$1,634.98

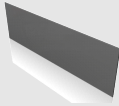
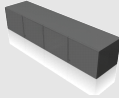
ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION			UNIT PRICE	EXTENDED
103 Conference							
5		1	TEKNION UNIVERSAL BCMCBP42120LS Boat Conference Table - Panel Bases, 42"d x 120"w, Linear Power Module - Standard 18" (1-3/16")			\$1,341.11	\$1,341.11
			Worksurface Finish	~A	Foundation Laminate		
			NOT DEFINED	??	INCOMPLETE		
6		12	TEKNION UNIVERSAL NJUU Just-Us Chair, Upholstered Seat			\$547.79	\$6,573.48
			Mesh Back	~Just-Us	Just-Us Mesh		
			Just-Us Mesh	?	----- UNSELECTED -----		
			Seat Upholstery Finish	~F01	Fabric Grade 1		
			Seating Fabric Grade 1	?	----- UNSELECTED -----		
			Fundamentals, Seating Fabric	?	----- UNSELECTED -----		
			Cylinder Style	1	Standard		
			Frame Finish	~E	Ebony		
			Ebony	8B	Ebony		
			Caster/ Glide	~	Casters (Hard)		
7		2	TEKNION UNIVERSAL BLELPS0442P180 Linear Power Module, Standard 18" - 4 Power/4 USB/2 Media, Plug-In, 180"			\$413.64	\$827.28
			NOT DEFINED	??	INCOMPLETE		
Subtotal for: 103 Conference							\$8,741.87

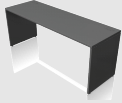
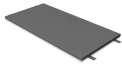
ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION			UNIT PRICE	EXTENDED
105 Office							
8		1	TEKNION UNIVERSAL BMRR23072 Rectangular Desk with Recessed Modesty - Full Gables, Full Modesty, 30" d x 72"w (1-3/16")			\$641.68	\$641.68
			NOT DEFINED	??	INCOMPLETE		
9		1	TEKNION UNIVERSAL BMRNC92448L Cross Grain Desk Return, Wall Access Modesty, 24"d x 48"w (1-3/16")			\$454.61	\$454.61
			NOT DEFINED	??	INCOMPLETE		
10		2	TEKNION UNIVERSAL NARJB Around Guest Chair, Mesh Back, Four Leg with Glides, Hard			\$343.33	\$686.66
			Around Mesh Finishes	A127	Black		
			Around Seat Finishes	~F01	Fabric Grade 1		
			Seating Fabric Grade 1	~05	Bitstream		
			Bitstream, Seating Fabric	B161	Hardware		
			Frame Finish	~E	Ebony		
			Ebony	8B	Ebony		
11		1	TEKNION UNIVERSAL NARNNW Around Synchro-Tilt Task Chair, Mesh Bk, Not Fully Assbld, No Hdrst, 2D Arms			\$611.21	\$611.21
			Around Mesh Back Finish	A127	Black		
			Seat Upholstery Finish	~F01	Fabric Grade 1		
			Seating Fabric Grade 1	~05	Bitstream		
			Bitstream, Seating Fabric	B161	Hardware		
			Seat Depth Adjustment	S	With Seat Depth Adj.		
			Lumbar Element	Y	With Lumbar Element		
			Cylinder Style	1	Standard		
			Frame Finish	~E	Ebony		
			Ebony	8B	Ebony		
			Caster/ Glide	~	Casters (Hard)		
			Caster Finish	1	Ebony		
Subtotal for: 105 Office							\$2,394.16

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION			UNIT PRICE	EXTENDED
107 Office							
12		1	TEKNION UNIVERSAL NARNNW Around Synchro-Tilt Task Chair, Mesh Bk, Not Fully Assbld, No Hdrst, 2D Arms			\$611.21	\$611.21
			Around Mesh Back Finish	A127	Black		
			Seat Upholstery Finish	~F01	Fabric Grade 1		
			Seating Fabric Grade 1	~05	Bitstream		
			Bitstream, Seating Fabric	B161	Hardware		
			Seat Depth Adjustment	S	With Seat Depth Adj.		
			Lumbar Element	Y	With Lumbar Element		
			Cylinder Style	1	Standard		
			Frame Finish	~E	Ebony		
			Ebony	8B	Ebony		
			Caster/ Glide	~	Casters (Hard)		
			Caster Finish	1	Ebony		
13		2	TEKNION UNIVERSAL NARJB Around Guest Chair, Mesh Back, Four Leg with Glides, Hard			\$343.33	\$686.66
			Around Mesh Finishes	A127	Black		
			Around Seat Finishes	~F01	Fabric Grade 1		
			Seating Fabric Grade 1	~05	Bitstream		
			Bitstream, Seating Fabric	B161	Hardware		
			Frame Finish	~E	Ebony		
			Ebony	8B	Ebony		
14		1	TEKNION UNIVERSAL BMRR23072 Rectangular Desk with Recessed Modesty - Full Gables, Full Modesty, 30" d x 72"w (1-3/16")			\$641.68	\$641.68
			NOT DEFINED	??	INCOMPLETE		
15		1	TEKNION UNIVERSAL BMRNC92448L Cross Grain Desk Return, Wall Access Modesty, 24"d x 48"w (1-3/16")			\$454.61	\$454.61
			NOT DEFINED	??	INCOMPLETE		
Subtotal for: 107 Office							\$2,394.16

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION			UNIT PRICE	EXTENDED
108 Office							
16		1	TEKNION UNIVERSAL BSPMSP1828B Mobile Pedestal - Pulls, 18"d x 28"h, Box/Box/File			\$461.02	\$461.02
			NOT DEFINED	??	INCOMPLETE		
17		1	TEKNION UNIVERSAL BOWTSW5072 Wall-Mounted Tackboard - Fabric, From Worksurface, 50"h, 72"w			\$124.39	\$124.39
			Fabric Master	~1	Fabric Grade 1		
18		1	TEKNION UNIVERSAL BMRB2448 Cross Grain Rectangular Bridge, 24"d x 48"w (1-3/16")			\$236.93	\$236.93
			NOT DEFINED	??	INCOMPLETE		
19		1	TEKNION UNIVERSAL BMRR23072 Rectangular Desk with Recessed Modesty - Full Gables, Full Modesty, 30" d x 72"w (1-3/16")			\$641.68	\$641.68
			NOT DEFINED	??	INCOMPLETE		
20		1	TEKNION UNIVERSAL BMRF92472 Rectangular Desk - Full Gables, Wall Access Modesty, 24"d x 72"w (1-3/16")			\$577.51	\$577.51
			NOT DEFINED	??	INCOMPLETE		
21		1	TEKNION UNIVERSAL BOCGW167215 Overhead Cabinet - Glass Hinged Doors, 16"d x 72"w x 15"h, Wall-Mounted			\$1,276.94	\$1,276.94
			Case Finish	~S	Source Laminate		
			Source Laminate	?	----- UNSELECTED -----		
			Door Frame Finish	?	----- UNSELECTED -----		
			Accent Colors	?	----- UNSELECTED -----		
			Glass Door Finish	~StdGlas	Glass Finish		
			Glass Door Finish	FT	Frosted		
			Shelf Finish	?	----- UNSELECTED -----		
			Foundation Colors	?	----- UNSELECTED -----		
			Key Style	?	----- UNSELECTED -----		
22		1	TEKNION UNIVERSAL BRAX05 Center Pencil Drawer			\$75.03	\$75.03

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION		UNIT PRICE	EXTENDED
23		1	TEKNION UNIVERSAL BFRLW241866L		\$689.56	\$689.56
			Tower with Full Solid Door, Wardrobe, 24"d x 18"w x 66"h, Left Side			
			Door Front Finish	~S	Source Laminate	
			Source Laminate	?	----- UNSELECTED -----	
			Case Finish	~SrcLam	Source Laminate	
			NOT DEFINED	??	INCOMPLETE	
24		1	TEKNION UNIVERSAL NARNNW		\$611.21	\$611.21
			Around Synchro-Tilt Task Chair, Mesh Bk, Not Fully Assbld, No Hdrst, 2D Arms			
			Around Mesh Back Finish	A127	Black	
			Seat Upholstery Finish	~F01	Fabric Grade 1	
			Seating Fabric Grade 1	~05	Bitstream	
			Bitstream, Seating Fabric	B161	Hardware	
			Seat Depth Adjustment	S	With Seat Depth Adj.	
			Lumbar Element	Y	With Lumbar Element	
			Cylinder Style	1	Standard	
			Frame Finish	~E	Ebony	
			Ebony	8B	Ebony	
			Caster/ Glide	~	Casters (Hard)	
			Caster Finish	1	Ebony	
25		1	TEKNION UNIVERSAL BCMMOSB42NN		\$604.66	\$604.66
			Round Meeting Table - Blade Star Base, 42"dia, No Cut-Out (1-3/16")			
			Worksurface Finish	~A	Foundation Laminate	
			Foundation Laminate	?	----- UNSELECTED -----	
			Edge Trim Style	6	Straight Trim	
			Edge Trim Finish	?	----- UNSELECTED -----	
			Support Finish	?	----- UNSELECTED -----	
			Accent Colors	?	----- UNSELECTED -----	
26		3	TEKNION UNIVERSAL NARJB		\$343.33	\$1,029.99
			Around Guest Chair, Mesh Back, Four Leg with Glides, Hard			
			Around Mesh Finishes	A127	Black	
			Around Seat Finishes	~F01	Fabric Grade 1	
			Seating Fabric Grade 1	~05	Bitstream	
			Bitstream, Seating Fabric	B161	Hardware	
			Frame Finish	~E	Ebony	
			Ebony	8B	Ebony	
					Subtotal for: 108 Office	\$6,328.92

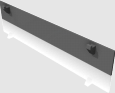
ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION			UNIT PRICE	EXTENDED
109 Office							
27		1	TEKNION UNIVERSAL BRAX05 Center Pencil Drawer			\$75.03	\$75.03
28		1	TEKNION UNIVERSAL BOWTSW5072 Wall-Mounted Tackboard - Fabric, From Worksurface, 50"h, 72"w			\$124.39	\$124.39
			Fabric Master	~1	Fabric Grade 1		
29		1	TEKNION UNIVERSAL NARNNW Around Synchro-Tilt Task Chair, Mesh Bk, Not Fully Assbld, No Hdrst, 2D Arms			\$611.21	\$611.21
			Around Mesh Back Finish	A127	Black		
			Seat Upholstery Finish	~F01	Fabric Grade 1		
			Seating Fabric Grade 1	~05	Bitstream		
			Bitstream, Seating Fabric	B161	Hardware		
			Seat Depth Adjustment	S	With Seat Depth Adj.		
			Lumbar Element	Y	With Lumbar Element		
			Cylinder Style	1	Standard		
			Frame Finish	~E	Ebony		
			Ebony	8B	Ebony		
			Caster/ Glide	~	Casters (Hard)		
			Caster Finish	1	Ebony		
30		1	TEKNION UNIVERSAL BOCGW167215 Overhead Cabinet - Glass Hinged Doors, 16"d x 72"w x 15"h, Wall-Mounted			\$1,276.94	\$1,276.94
			Case Finish	~S	Source Laminate		
			Source Laminate	?	----- UNSELECTED -----		
			Door Frame Finish	?	----- UNSELECTED -----		
			Accent Colors	?	----- UNSELECTED -----		
			Glass Door Finish	~StdGlas	Glass Finish		
			Glass Door Finish	FT	Frosted		
			Shelf Finish	?	----- UNSELECTED -----		
			Foundation Colors	?	----- UNSELECTED -----		
			Key Style	?	----- UNSELECTED -----		
31		1	TEKNION UNIVERSAL BMRR23072 Rectangular Desk with Recessed Modesty - Full Gables, Full Modesty, 30" d x 72"w (1-3/16")			\$641.68	\$641.68
			NOT DEFINED	??	INCOMPLETE		

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION			UNIT PRICE	EXTENDED
32		1	TEKNION UNIVERSAL BSPMSP1828B Mobile Pedestal - Pulls, 18"d x 28"h, Box/Box/File			\$461.02	\$461.02
			NOT DEFINED	??	INCOMPLETE		
33		3	TEKNION UNIVERSAL NARJB Around Guest Chair, Mesh Back, Four Leg with Glides, Hard			\$343.33	\$1,029.99
			Around Mesh Finishes	A127	Black		
			Around Seat Finishes	~F01	Fabric Grade 1		
			Seating Fabric Grade 1	~05	Bitstream		
			Bitstream, Seating Fabric	B161	Hardware		
			Frame Finish	~E	Ebony		
			Ebony	8B	Ebony		
34		1	TEKNION UNIVERSAL BMRF92472 Rectangular Desk - Full Gables, Wall Access Modesty, 24"d x 72"w (1-3/16")			\$577.51	\$577.51
			NOT DEFINED	??	INCOMPLETE		
35		1	TEKNION UNIVERSAL BMRB2448 Cross Grain Rectangular Bridge, 24"d x 48"w (1-3/16")			\$236.93	\$236.93
			NOT DEFINED	??	INCOMPLETE		
36		1	TEKNION UNIVERSAL BCMMOSB42NN Round Meeting Table - Blade Star Base, 42"dia, No Cut-Out (1-3/16")			\$604.66	\$604.66
			Worksurface Finish	~A	Foundation Laminate		
			Foundation Laminate	?	----- UNSELECTED -----		
			Edge Trim Style	6	Straight Trim		
			Edge Trim Finish	?	----- UNSELECTED -----		
			Support Finish	?	----- UNSELECTED -----		
			Accent Colors	?	----- UNSELECTED -----		
37		1	TEKNION UNIVERSAL BFRLW241866R Tower with Full Solid Door, Wardrobe, 24"d x 18"w x 66"h, Right Side			\$689.56	\$689.56
			Door Front Finish	~S	Source Laminate		
			NOT DEFINED	??	INCOMPLETE		
Subtotal for: 109 Office							\$6,328.92

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
113 Safety Equipment					
38		1	ULINE H-6159 QUICK ADJUST WIRE SHELVING - 36 X 18 X 63", CHROME	\$513.33	\$513.33
39		1	ULINE H-1105T INDUSTRIAL STORAGE CABINET - 36 X 18 X 72", UNASSEMBLED, TAN	\$613.33	\$613.33
40		1	ULINE H-2449 GARMENT STORAGE CENTER WITH SHELVES - 52 X 18 X 72"	\$340.00	\$340.00
Subtotal for: 113 Safety Equipment					\$1,466.66

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION			UNIT PRICE	EXTENDED
118 Breakroom							
41		1	TEKNION UNIVERSAL CQSSLLES Sofa, Low, 3-Seater with 3 Cushions, Single Upholstery			\$4,185.84	\$4,185.84
			Seat and Back Upholstery Finish	~F03	Fabric Grade 3		
			Seating Fabric Grade 3, All Seating	~03	Ample		
			Ample, Seating Fabric	T277	Halide		
			Metal Frame Finish	~Foundat	Foundation Colors		
			Foundation Colors, Restricted	23	Foundry Onyx (Textured)		
42		16	50123 OFS ACEN Upholstered seat with molded seat foam, mesh back, 3 chairs per carton			\$824.04	\$13,184.64
43		2	TEKNION UNIVERSAL CQSSLLAS Sofa, Low, 1-Seater, Single Upholstery			\$2,400.16	\$4,800.32
			Seat and Back Upholstery Finish	~F03	Fabric Grade 3		
			Seating Fabric Grade 3, All Seating	~03	Ample		
			Ample, Seating Fabric	T277	Halide		
			Metal Frame Finish	~Foundat	Foundation Colors		
			Foundation Colors, Restricted	23	Foundry Onyx (Textured)		
44		1	TEKNION UNIVERSAL ZNTFF18 Round Side Table, 18" dia			\$353.52	\$353.52
			Surface Finishes	~A	Zones Foundation Laminate		
			Zones Foundation Laminate	RV	Very White		
			Edge Trim Style	H	Full Knife		
			Edge Trim Colors	SS	Very White		
			Leg Wood Finish	DC	Pecan Beech		
45		16	TEKNION UNIVERSAL CTFTCS2472 Rectangular Flip-Top Table, C-Leg, Slender, 24"d x 72"w			\$833.46	\$13,335.36
			Grommet Style	A	No Grommet/ No Power Module		
			WS Finish, Edge Trim and Corner Detail	~A	Foundation Laminate		
			Foundation Laminate	?	----- UNSELECTED -----		
			Edge Trim Style	6	Straight Trim		
			Corner Detail	S	Standard Corner		
			Edge Trim Finish	?	----- UNSELECTED -----		
			Leg Finish	~Found	Foundation Colors		
			Foundation Colors	?	----- UNSELECTED -----		

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION		UNIT PRICE	EXTENDED
46		2	50123 OFS ACEN Upholstered seat with molded seat foam, mesh back, 1 chair per carton		\$294.84	\$589.68
47		1	TEKNION UNIVERSAL NBAG Banqs Ganging Plate, 1 Piece		\$50.84	\$50.84
48		2	TEKNION UNIVERSAL NBASL3NS Banqs Single-Sided Sofa, Low Screen,3-Seat,No Electrical Mod,Single Uph Banq Seat Upholstery Finish ~F03 Fabric Grade 3 Seating Fabric Grade 3 ? ----- UNSELECTED ----- Marl Cloth, Seating Fabric ? ----- UNSELECTED ----- Foundation, Mica, and Accent ~Foundat Foundation Colors Foundation Colors ? ----- UNSELECTED -----		\$4,308.00	\$8,616.00
49		1	TEKNION UNIVERSAL ZNTFC3830 Rectangular Coffee Table, 38"w x 30"d Surface Finishes ~A Zones Foundation Laminate Zones Foundation Laminate RV Very White Edge Trim Style H Full Knife Edge Trim Colors SS Very White Leg Wood Finish DC Pecan Beech		\$590.12	\$590.12
50		2	TEKNION UNIVERSAL ATCCB30 Circular Bistro Table, 1 28"h Mono-Pod Base, 30" Surface Finishes ~A Foundation Laminate Foundation Laminate ? ----- UNSELECTED ----- Edge Trim Style 6 Straight Trim Edge Trim Colors ? ----- UNSELECTED ----- Base Finish ~Found Foundation Colors Foundation Colors ? ----- UNSELECTED -----		\$479.93	\$959.86
51		5	TEKNION UNIVERSAL NKUZ Kupp Chair, No Arms, Upholstered Seat Upholstery Finish ~F03 Fabric Grade 3 Seating Fabric Grade 3 ~05 Situ Situ, Seating Fabric F118 Statue Chair Finish HF Very White Frame Finish 83 Very White Casters ~ Hard Casters		\$400.18	\$2,000.90

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
52		16	TEKNION UNIVERSAL CTLMF72 Modesty Panel for Flip-Top Table - Laminate, 72"w	\$156.40	\$2,502.40
Finish ~S Source Laminate Source Laminate ? ----- UNSELECTED ----- Edge Trim Finish ? ----- UNSELECTED ----- Hardware Finish ? ----- UNSELECTED ----- Foundation Colors ? ----- UNSELECTED -----					
Subtotal for: 118 Breakroom					\$51,169.48

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
121 Paint & Storage					
53		2	ULINE H-4888 VERTICAL BAR RACK - 36 X 24 X 85"	\$380.00	\$760.00
54		2	ULINE H-1772BL SHELF BIN ORGANIZER - 36 X 12 X 75" WITH 4 X12 X 4" BLACK BINS	\$566.67	\$1,133.34
55		6	ULINE H-5724 PALLET RACK WIRE DECKING - 46" WIDE, 42" DEEP	\$54.67	\$328.02
56		1	ULINE H-7698S STEEL ASSEMBLY TABLE WITH BOTTOM SHELF - 72 X48"	\$953.33	\$953.33
Subtotal for: 121 Paint & Storage					\$3,174.69

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
126 Parts					
57		4	ULINE H-5715 PALLET RACKING 96 X 42 X 96"	\$633.33	\$2,533.32
58		1	ULINE H-8447 INDUSTRIAL STORAGE CABINET - 30 X 18 X 72", ASSEMBLED, BLACK	\$726.67	\$726.67
59		2	ULINE H-10711 CHROME WIRE SHELVING UNIT - 42 X 18 X 96"	\$293.33	\$586.66
60		4	ULINE H-5724 PALLET RACK WIRE DECKING - 46" WIDE, 42" DEEP	\$54.67	\$218.68
Subtotal for: 126 Parts					\$4,065.33

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
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130 Mechanic Office

61		2	ULINE H-11146 SINGLE PEDESTAL INDUSTRIAL OFFICE DESK - 48 X 24", GRAY TOP, BLACK BASE	\$913.33	\$1,826.66
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62		2	TEKNION UNIVERSAL NARNNW Around Synchro-Tilt Task Chair, Mesh Bk, Not Fully Assbld, No Hdrst, 2D Arms	\$611.21	\$1,222.42
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Around Mesh Back Finish	A127	Black
Seat Upholstery Finish	~F01	Fabric Grade 1
Seating Fabric Grade 1	~05	Bitstream
Bitstream, Seating Fabric	B161	Hardware
Seat Depth Adjustment	S	With Seat Depth Adj.
Lumbar Element	Y	With Lumbar Element
Cylinder Style	1	Standard
Frame Finish	~E	Ebony
Ebony	8B	Ebony
Caster/ Glide	~	Casters (Hard)
Caster Finish	1	Ebony

Subtotal for: 130 Mechanic Office \$3,049.08

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
134 Cold Storage					
63		4	ULINE H-3845 CANTILEVER RACK - SINGLE SIDED, 56 X 40 X 96"	\$1,780.00	\$7,120.00
64		10	ULINE H-5715 ADD ADD-ON UNIT FOR TWO-SHELF PALLET RACK - 96 X 42 X 96"	\$433.33	\$4,333.30
65		24	ULINE H-5724 PALLET RACK WIRE DECKING - 46" WIDE, 42" DEEP	\$54.67	\$1,312.08
66		1	ULINE H-1564M-Y STANDARD FLAMMABLE STORAGE CABINET -MANUAL DOORS, YELLOW, 45 GALLON	\$1,680.00	\$1,680.00
67		3	ULINE H-5715 PALLET RACKING 96 X 42 X 96"	\$633.33	\$1,899.99
Subtotal for: 134 Cold Storage					\$16,345.37

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
201 Garage Mezzanine					
68		24	ULINE H-5724 PALLET RACK WIRE DECKING - 46" WIDE, 42" DEEP	\$54.67	\$1,312.08
69		8	ULINE H-5715 ADD ADD-ON UNIT FOR TWO-SHELF PALLET RACK - 96 X 42 X 96"	\$433.33	\$3,466.64
70		4	ULINE H-5715 PALLET RACKING 96 X 42 X 96"	\$633.33	\$2,533.32
Subtotal for: 201 Garage Mezzanine					\$7,312.04

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
202 Parts Mezzanine					
71		12	ULINE H-5724 PALLET RACK WIRE DECKING - 46" WIDE, 42" DEEP	\$54.67	\$656.04
72		1	ULINE H-8610 TWO-SHELF PALLET RACK STARTER UNIT - 48 X 24 X 96"	\$486.67	\$486.67
73		2	ULINE H-8610 ADD ADD-ON UNIT FOR TWO-SHELF PALLET RACK - 48 X 24 X 96"	\$340.00	\$680.00
74		2	ULINE H-5715 PALLET RACKING 96 X 42 X 96"	\$633.33	\$1,266.66
75		4	ULINE H-5715 ADD ADD-ON UNIT FOR TWO-SHELF PALLET RACK - 96 X 42 X 96"	\$433.33	\$1,733.32
Subtotal for: 202 Parts Mezzanine					\$4,822.69

ITEM	IMAGE	QTY	PRODUCT NUMBER/DESCRIPTION	UNIT PRICE	EXTENDED
				SUBTOTAL	\$120,361.11
				ULINE FREIGHT	\$1,000.00
				GRAND TOTAL	\$121,361.11

SUBTOTALS BY ROOM/AREA

101 Entry	\$1,132.76
102 Reception	\$1,634.98
103 Conference	\$8,741.87
105 Office	\$2,394.16
107 Office	\$2,394.16
108 Office	\$6,328.92
109 Office	\$6,328.92
113 Safety Equipment	\$1,466.66
118 Breakroom	\$51,169.48
121 Paint & Storage	\$3,174.69
126 Parts	\$4,065.33
130 Mechanic Office	\$3,049.08
134 Cold Storage	\$16,345.37
201 Garage Mezzanine	\$7,312.04
202 Parts Mezzanine	\$4,822.69
Freight/Install/Surcharges	\$1,000.00
GRAND TOTAL	\$121,361.11

CUSTOMER ORDER ACCEPTANCE

PLEASE REVIEW THIS QUOTATION AND NOTIFY US PROMPTLY OF ANY CORRECTIONS REQUIRED.
THANK YOU FOR THE OPPORTUNITY TO BE OF SERVICE!

To ensure your Purchase Order (PO) is processed quickly and efficiently, please adhere to the following requirements:

1. All purchase orders must be issued to:

Duet Resource Group/DJMI
224 South 1st Street
Milwaukee, WI 53204

Changes to quantities and/or options/finishes will affect this quote. If applicable, other charges such as freight, tax, installation and/or delivery fees may be added at time of order. This quotation is valid for 30 days, starting on the date shown in the quote header. For updated pricing, please contact your sales representative.

Terms & Conditions:

1. Please include a copy of your quotation with your purchase order. Your purchase order should stipulate exactly the merchandise or service to be transacted by quantity, finish options and price. In the event that your company does not issue standard purchase orders, then all quotes must be accompanied by a statement on official company letterhead, with an authorizing signature allowing Duet Resource Group to proceed with the order as documented. By submitting a purchase order or authorization letter, you are agreeing to the terms listed on this page.
2. Purchase orders acknowledged by Duet Resource Group cannot be returned, changed, or canceled without Duet's written consent. Any changes or cancellations must happen within 3 business days from the issue date on the purchase order, or client is subject to a 15% net (of total order) cancellation fee. Under no circumstances will changes or cancellations be accepted on any custom product.
3. Any applicable sales or other tax will be added upon invoicing. If you are tax exempt, please provide a copy of a valid sales tax exemption certificate with your purchase order.
4. Duet requires a 50% deposit based on your order total, to be submitted when the order is placed. This deposit should include 50% of the tax for taxable entities. The remaining 50% will be billed upon receipt of product. A deposit check also constitutes as an agreement to proceed with the order as documented on the quote in accordance with the terms & conditions. If punch-list items exist, you will be invoiced 40% of the remaining total, and the remaining 10% after the punch-list items or change orders are completed.
5. Duet reserves the right to collect a finance charge after 30 days of 1.5% per month.
6. Freight and Fuel surcharge. Duet reserves the right to apply a surcharge to customer orders, passed along from its manufacturers.
7. Duet accepts credit card payments; a 3.5% processing fee will be applied.

Please sign below indicating acceptance of this proposal along with the terms and conditions noted.

Approved by:

Name:

Title:

Date:

FF&E BUDGET ALLOWANCES

PROJECT NAME: CoFort Atkinson - Public Works Facility
 PROJECT NUMBER: 22131
 DATE: 11/18/2024
 Submitted 12/10/2024



BUILDING AREA AND PRODUCT	MANUFACTURER (Basis of Design)	PRODUCT CODE	LIST PRICE each	QUANTITY	DISCOUNT %	TOTAL PRICE	NOTES
ENTRY 101							
Single Guest/Side Chair	Offices to Go	OTG39188	\$275	2	61.50%	\$211.74	
RECEPTION 102							
60"x30" Sit/Stand Desk	Offices to Go	OTGHABASE3 & SL6030TOP	\$1,033	1	61.50%	\$397.70	base and top
Task Seating (Mesh Back/Upholstered Seat)	Offices to Go	OTG10904B	\$535	1	61.50%	\$205.97	Synchro- Tilter w/ Multi position tilt lock, tension tilt adj, Mesh Back with Lumbar support, Height Adjustable arms
Chair Mat	Uline	H-1693		1		\$89.32	
CONFERENCE 103							
120" Boat Shaped Table w/ Integrated Power Supply	Global Industries	Z48120BE	\$5,827	1	61.50%	\$2,243.39	48" d X 120 wBoardroom table, two pieces with wire concealment bases and management, Left and right power grommet
Power Module	Global Industries	PRTMC5421B	\$599	1	61.50%	\$230.61	Single Sided recessed power block 421, 1 duplex w/ A+C USB 1 Data knockout, 1 duplex on bottom, 10 ft power cord
Executive Seating (Tufted Seat/Back)	Offices to Go	OTG11776B	\$320	12	61.50%	\$1,478.40	Black Lux hide w/ mock leather trim, single position tilt lock w/ fixes height molded arms, Black base dual wheel carpet casters
OFFICE 105							
72"x30" Desk Shell (Laminate)	Offices to Go	SL7130DS	\$457	1	61.50%	\$175.94	
48"x24" Desk Return (Laminate)	Offices to Go	SL4824R	\$285	1	61.50%	\$109.72	
Task Seating (Mesh Back/Upholstered Seat)	Offices to Go	OTG10904B	\$535	1	61.50%	\$205.97	Synchro- Tilter w/ Multi position tilt lock, tension tilt adj, Mesh Back with Lumbar support, Height Adjustable arms
Side/Guest Chair (Mesh Back/Upholstered Seat)	Offices to Go	OTG11760B	\$295	2	61.50%	\$227.14	Arm, Chair, Black Mesh Back & Black Fabric Seat, 4 legged base, Glides
OFFICE 107							
71"x30" Desk Shell (Laminate)	Offices to Go	SL7130DS	\$457	1	61.50%	\$175.94	
48"x24" Desk Bridge (Laminate)	Offices to Go	SL4824R	\$285	1	61.50%	\$109.72	
Task Seating (Mesh Back/Upholstered Seat)	Offices to Go	OTG10904B	\$535	1	61.50%	\$205.97	Synchro- Tilter w/ Multi position tilt lock, tension tilt adj, Mesh Back with Lumbar support, Height Adjustable arms
Side/Guest Chair (Mesh Back/Upholstered Seat)	Offices to Go	OTG11760B	\$295	2	61.50%	\$227.14	Arm, Chair, Black Mesh Back & Black Fabric Seat, 4 legged base, Glides
OFFICE 108							
71"x30" Desk Shell (Laminate)	Offices to Go	SL7130DS	\$457	1	61.50%	\$175.94	
48"x24" Desk Bridge (Laminate)	Offices to Go	SL4824FB	\$229	1	61.50%	\$88.16	
71"x24" Credenza Shell (Laminate)	Offices to Go	SL7124CS	\$426	1	61.50%	\$164.01	
24"x24"x66" Personal Cabinet (Laminate)	Global Industries	Z24LBWAL	\$1,608	1	61.50%	\$619.08	
Accessories/Drawer	Offices to Go	SL20CD	\$152	1	61.50%	\$58.52	
36"x15" Wall Mount Hutch (Laminate)	Offices to Go	SL36WC	\$311	2	61.50%	\$239.46	
Glass Hutch Doors	Offices to Go	SL36SIDR	\$230	2	61.50%	\$177.10	
68 25"x17.25" Wall Mount Tack Board	Offices to Go	SL71TB	\$143	1	61.50%	\$55.05	
42" Round Tabletop (Laminate)	Offices to Go	SL42R	\$375	1	61.50%	\$144.37	
Mobile File Pedestal (Laminate)	Offices to Go	SL22BFM	\$510	1	61.50%	\$196.35	Mobile box file pedestal
Task Seating (Mesh Back/Upholstered Seat)	Offices to Go	OTG10904B	\$535	1	61.50%	\$205.97	Synchro- Tilter w/ Multi position tilt lock, tension tilt adj, Mesh Back with Lumbar support, Height Adjustable arms
Side/Guest Chair (Mesh Back/Upholstered Seat)	Offices to Go	OTG11760B	\$295	3	61.50%	\$340.71	Arm, Chair, Black Mesh Back & Black Fabric Seat, 4 legged base, Glides
OFFICE 109							
72"x30" Desk Shell (Laminate)	Offices to Go	SL7130DS	\$457	1	61.50%	\$175.94	
48"x24" Desk Bridge (Laminate)	Offices to Go	SL4824FB	\$229	1	61.50%	\$88.16	
72"x24" Credenza Shell (Laminate)	Offices to Go	SL7124CS	\$426	1	61.50%	\$164.01	
24"x24"x66" Personal Cabinet (Laminate)	Global Industries	Z24LBWAL	\$1,608	1	61.50%	\$619.08	
Accessories/Drawer	Offices to Go	SL20CD	\$152	1	61.50%	\$58.52	
26"x15" Wall Mount Hutch (Laminate)	Offices to Go	SL36WC	\$311	2	61.50%	\$239.46	
Glass Hutch Doors	Offices to Go	SL36SIDR	\$230	2	61.50%	\$177.10	
69"x16.5" Wall Mount Tack Board	Offices to Go	SL71TB	\$143	1	61.50%	\$55.05	
42" Round Tabletop (Laminate)	Offices to Go	SL42R	\$375	1	61.50%	\$144.37	
Mobile File Pedestal (Laminate)	Offices to Go	SL22BFM	\$510	1	61.50%	\$196.35	Mobile box file pedestal
Task Seating (Mesh Back/Upholstered Seat)	Offices to Go	OTG10904B	\$535	1	61.50%	\$205.97	Synchro- Tilter w/ Multi position tilt lock, tension tilt adj, Mesh Back with Lumbar support, Height Adjustable arms
Side/Guest Chair (Mesh Back/Upholstered Seat)	Offices to Go	OTG11760B	\$295	3	61.50%	\$340.71	Arm, Chair, Black Mesh Back & Black Fabric Seat, 4 legged base, Glides
SAFETY EQUIPMENT 113							
Cabinet Storage 36"Wx18"Dx72"H	Uline H1105-T			1		\$533.60	
Chrome Wire Shelving 36"Wx18"Dx63"H	Uline H6159			1		\$446.60	
Garment Storage Center w/ Shelves	Uline H2449			1		\$295.80	
BREAKROOM 118							
72"x24" Training Table	Offices to Go	SL7124TOP	\$198	16	61.50%	\$1,219.68	
Flip/Nest Training Table Base	Offices to Go	OTGFTBASE71	\$493	16	61.50%	\$3,036.80	
Modesty Panel	Offices to Go	INCL IN ABOVE		16	61.50%		
Nesting Training Chairs (Mesh Back/Upholstered Seat)	Offices to Go	OTG11341B	\$400	50	61.50%	\$7,700.00	
74" Sofa (Grade 3 Upholstery)	Offices to Go	OTG13053	\$1,951	1	61.50%	\$751.13	
Single Lounge Seat (Grade 3 Upholstery)	Offices to Go	OTG13051	\$1,051	2	61.50%	\$809.26	
30"Hx36"Dia. Table (Laminate)	Offices to Go	SL36RDTOP & OTGDXTB3642	\$505	2	61.50%	\$388.84	Metal base and top
Side Chair (Upholstered Seat/Poly Back)	Offices to Go	OTG11740B	\$360	5	61.50%	\$693.00	
Banquette Seating (Grade 3 Upholstery Seat/Back)	Global Industries	8506-48 & 8506-78	\$8,217	1	61.50%	\$3,163.54	48" & 78" banquette
Side Table (Laminate)	Offices to Go	SL24SQTOP & (4) OTGSTL15	\$323	1	61.50%	\$124.35	4 legs with top
Coffee Table (Laminate)	Offices to Go	SL36SQTOP & (4) OTGSTL15	\$410	1	61.50%	\$157.85	4 legs with top
PAINT AND SIGN STORAGE 121							
Bin Storage 36"Wx12"Dx75"H	Uline 1772			2		\$939.60	

BUILDING AREA AND PRODUCT	MANUFACTURER (Basis of Design)	PRODUCT CODE	LIST PRICE each	QUANTITY	DISCOUNT %	TOTAL PRICE	NOTES
Roll Storage 36"Wx24"Dx45"H	Uline H4888			2		\$626.40	
Heavy Duty Shelf Unit 48"Wx24"Dx72"H	Uline H3913			6		\$4,176.00	
Steel Assembly Table w/ Bottom Shelf	Uline H7698S			1		\$829.40	
PARTS 126							
Cabinet Storage 30"Wx18"Dx72"H	Uline H8447			1		\$475.60	
Pallet Racking 96"Wx42"Dx96"H	Uline H5715			4		\$2,296.80	
Wire Shelving 42"Wx96"H	Uline H5724			4		\$171.68	For Pallet Rack
Wire Vertical Shelving 42"Wx96"H	Uline H10711			2		\$510.40	
COLD STORAGE 134							
Pallet Racking 96"Wx42"Dx96"H	Uline 5715			3		\$1,722.60	
Add On 96"Wx42"Dx96"	Uline 5715 Add			10		\$4,176.00	
Wire Shelving 42"Dx96"W	Uline H5724			24		\$1,030.08	
Cantilever Rack 56"Wx40"Dx96"H	Uline H3845			4		\$6,124.80	
Flammable Safety Cabinet 43"x18"x65"	Uline H1564M-Y			1		\$1,461.60	
MECHANIC OFFICE 130							
Industrial Office Desk	Uline H11146			2		\$1,589.20	Single Pedestal
Task Seating (Mesh Back/Upholstered Seat)	KB Series 8901B	OTG10904B	\$535	2	61.50%	\$411.94	Synchro- Tilter w/ Multi position tilt lock, tension tilt adj, Mesh Back with Lumbar support, Height Adjustable arms
GARAGE MEZZANINE 201							
Pallet Racking 96"Wx42"Dx96"H	Uline H5715			4		\$2,296.80	
Add On Unit 96"Wx42"Dx96"H	Uline H5715 ADD			8		\$3,340.80	
Wire Shelving 42"Dx96"W	Uline H5724			24		\$1,030.08	
PARTS MEZZANINE 202							
Tire Racking 48"Wx24"Dx96"H	Uline H8610			1		\$423.40	
Add On Unit 48"Wx24"Dx96"H	Uline H8610 ADD			2		\$591.60	
Pallet Racking 96"Wx42"Dx96"H	Uline H5715			2		\$1,148.40	
Add On Unit 96"Wx42"Dx96"H	Uline H5715 ADD			4		\$1,670.40	
Wire Shelving 42"Dx96"W	Uline H5724			12		\$515.04	
FF&E - BUDGET SUB TOTAL (PRODUCT ONLY)						\$68,103.18	All Uline Product Includes procurement fee
Sales Tax			Updated Rate Here:			\$0.00	n/a
Freight (Estimate)			Updated Rate Here:			\$820.51	on the uline product
Installation (Estimate)			Updated Rate Here:			\$30,026.00	Labor for Office to Go, Global and Uline product (assumes stair carry to mezzanine for Uline Product)
FF&E - BUDGET GRAND TOTAL						\$98,949.69	

The background of the page is a blurred photograph of an office interior. It shows several desks with white and grey cabinetry, blue and teal ergonomic chairs, and computer monitors. Large windows in the background let in natural light, showing some greenery outside.

Fort Atkinson Public Works Facility

FURNITURE, FIXTURES AND EQUIPMENT
REQUEST FOR PROPOSAL

ATMOSPHERE COMMERCIAL INTERIORS
DECEMBER 10, 2024



CONTENT

- 01 Executive Summary
- 02 About Atmosphere
- 03 Your Project
 - Products + Pricing
 - Our Process
 - Schedule
 - Vendor Information
- 04 Delivery and Installation
- 05 Warranties and Maintenance
- 06 Thank you

EXECUTIVE SUMMARY

THANK YOU

On behalf of our entire team at Atmosphere Commercial Interiors, we appreciate the opportunity to respond to the **Fort Atkinson Public Works Facility** request for proposal.

We understand how important this project is to the community and will demonstrate how our scale, experience, and processes can support your project and goals for years to come. Our commitment to this partnership is backed by:

- Our **extensive history** of strong performance serving a diverse base of local and national clients.
- A **dedicated local team** of talented specialists who will deliver a premier solution and project fulfillment.
- A **product & vendor strategy** optimized for your budget, timeline, desired quality and creative vision.

Extensive History and Experience

For 75 years, we have teamed with design firms and clients across the country and around the globe to transform spaces and empower people. We deliver premium experiences using a creative mix of products, a collaborative ideation process, and a strong focus on customer service.

Dedicated Local Team

Your team was hand-selected to become your thoughtful partner for your immediate project needs and for years to come. With extensive experience in the commercial furniture industry, your team will provide the knowledge and accountability that you deserve while operating cohesively to provide superior client service.

Product & Vendor Strategy

Throughout our experience, we have worked to better streamline our processes to ease our clients' workloads. With consistent, clear communication sent regarding quotes, budget reporting and scheduling along the way, Atmosphere will manage all product and freight purchases to help eliminate the hassle of having to set up and manage multiple vendors, negotiate preferred pricing, contracts, ship dates and warranties. *This allows you to submit payment to one source, versus hundreds of manufacturers.*

Our services also warrant that any shortages and/or damaged product will be resolved in a timely manner by our onsite team. *As your partner, you can expect a comprehensive project delivery process throughout that will ensure seamless, consistent execution.*

Thank you

As the Team Lead and your main point of contact, it will be my personal duty to ensure that our team is aligned with your project needs and that **we exceed your expectations** to become your best vendor partner.

We are confident that we can work with you to develop a solution that is curated and tailored to meet your specific project needs!

Kindest Regards,

Kristine Scott

Account Manager, *Atmosphere*
kristine.scott@atmosphereci.com





ABOUT

ATMOSPHERE

ABOUT

ATMOSPHERE *an Omni Company*

We look at space like a story—rich with meaning—that can ignite your imagination and set the scene for your culture and business to flourish. And for 75 years, our clients have entrusted us to connect their people and organizational purpose together through the power of place.

We are proud to partner with and represent Steelcase— a global leader in the commercial furniture industry with an unmatched distribution network and a passion for research and innovation. With Steelcase as a strategic business partner, we create stunning workplace solutions that unleash potential and drive long-term value. We transform and furnish spaces with a creative and innovative lens, drawing on deep industry experience and an unparalleled product and finishes portfolio.

Together with our services arm, we employ over 400 team members across sales, support, design, installation and operations who help execute projects around the globe.

We work with Fortune 500 clients and neighborhood start-ups, delivering a straightforward and simple experience. Our market expertise is among the most extensive in the country, spanning corporate, healthcare, education, and including specializations in global sourcing, retail, sports, and hospitality.

Each year, as we add more than 150 new clients to our portfolio and orchestrate nearly 1,000 projects, we execute with care and precision and lead with our core values. So you can expect a great experience, a solution that is authentic to your brand and culture, and a partner that values your people, your purpose and your place.

Let’s work together on crafting your story.

OFFICES + WORKLABS

Madison | De Pere | Eau Claire | Wausau | Rockford | Minneapolis
Phoenix | Tucson | Albuquerque | El Paso

10

worklabs in Minnesota,
Wisconsin, Illinois, New
Mexico, Texas, + Arizona

400+

employees across sales,
support, design,
installation and
operations

10x

Steelcase Premier
Partner award winner

10

distribution centers

500,000

sq ft of rackable, secure,
climate-controlled
warehouse space

48

privately-owned
vehicle fleet



ABOUT

OUR LOCAL WISCONSIN IMPACT

Community Involvement

We believe in the strength of community and that our support should move beyond words on a page—it should activate meaningful change and be visible throughout our everyday work and interactions.

We prioritize community involvement by supporting the needs of local families, education and non-profits—from serving meals, to school library makeovers and neighborhood revitalization, we are passionate about giving back.

- Habitat for Humanity
- Design for a Difference
- Middleton Chamber of Commerce
- Domestic Abuse Intervention Services (DAIS)
- Madison Museum of Contemporary Art (MMoCA)
- Empty Stocking Club
- American Family Children’s Hospital
- IIDA Wisconsin
- ASID Wisconsin
- Rotary International
- Boys & Girls Club of Dane County
- Big Brothers Big Sisters
- United Way
- Downtown Madison Inc. (DMI)

Local Team

Our local Atmosphere leadership team includes part-owners of our company, and through our history as Rowley-Schlimgen and Target Commercial Interiors, we’ve been a part of the Madison community since 1949.

We’re proud to have received awards as a company and as individual team members.

- Three-time Madison Magazine Best Place to Work
- Debra Alton was a finalist for the 2020 ATHENA Leadership Award.
- Our CEO, Carlene Wilson, was named an Ernst + Young Entrepreneur Of The Year® 2021 Heartland finalist.

Atmosphere-Coordinated GIK Donations + New Items provided to:

- Habitat for Humanity
- Latino Academy
- Community Living Connections
- The Road Home
- Forward Community Investments
- The Beacon
- Catholic Charities
- Girl Scouts of Wisconsin – Badgerland Council
- Target Library Makeovers
- Red Caboose Daycare
- American Red Cross – Badger Chapter
- Madison Public Library
- MMoCA
- Goodman Community Center
- Wisconsin Early Autism Project
- Monona Police Department
- Downtown Madison Inc. (DMI)



ABOUT

OUR EXPERIENCE

Our belief in the power of place defines who we are, and how we work—because when people are inspired and supported by their environment, they thrive. That’s why we’ve teamed with design firms and clients across the country and around the globe to transform spaces and empower people.

American Family Insurance

Chippewa Valley Financial Services

Connexus Credit Union

Eau Claire City Hall

L.E. Phillips Memorial Public Library

Marshfield Clinic

Mayo Clinic

Mercyhealth

City of Barron Municipal Center

Dane County Job Center

Madison Metropolitan School District

Rakuten

Rite-Hite

Royal Credit Union

Sauk Valley Bank

Society Insurance

Trek

TruStage

University of Wisconsin

UW Credit Union

Westconsin Credit Union



your team

DEDICATED TO FORT
ATKINSON PUBLIC WORKS

Kristine Scott will lead your dedicated project team and is your centralized, single-point-of-contact. In her role, Kristine will intake and manage your needs while ensuring timely, exceptional deliverables throughout your project's process.

In addition to Kristine, you will have a dedicated team supporting your project. Your core team includes team members with extensive experience managing both local and large corporate accounts and will provide the product knowledge, transparency, and accountability that Fort Atkinson Public Works needs and deserves.

The size and national scale of Atmosphere's business across multiple regions allows for agility. As project needs increase, additional, experienced team members across project management, design, and project coordinator roles are available to lend their services and expertise as project needs flex.

You can be confident that you'll have a consistent level of service from a familiar, local core team who will do everything they can to make your experience a great one.



KRISTINE SCOTT



ASHLEY MOLBECK



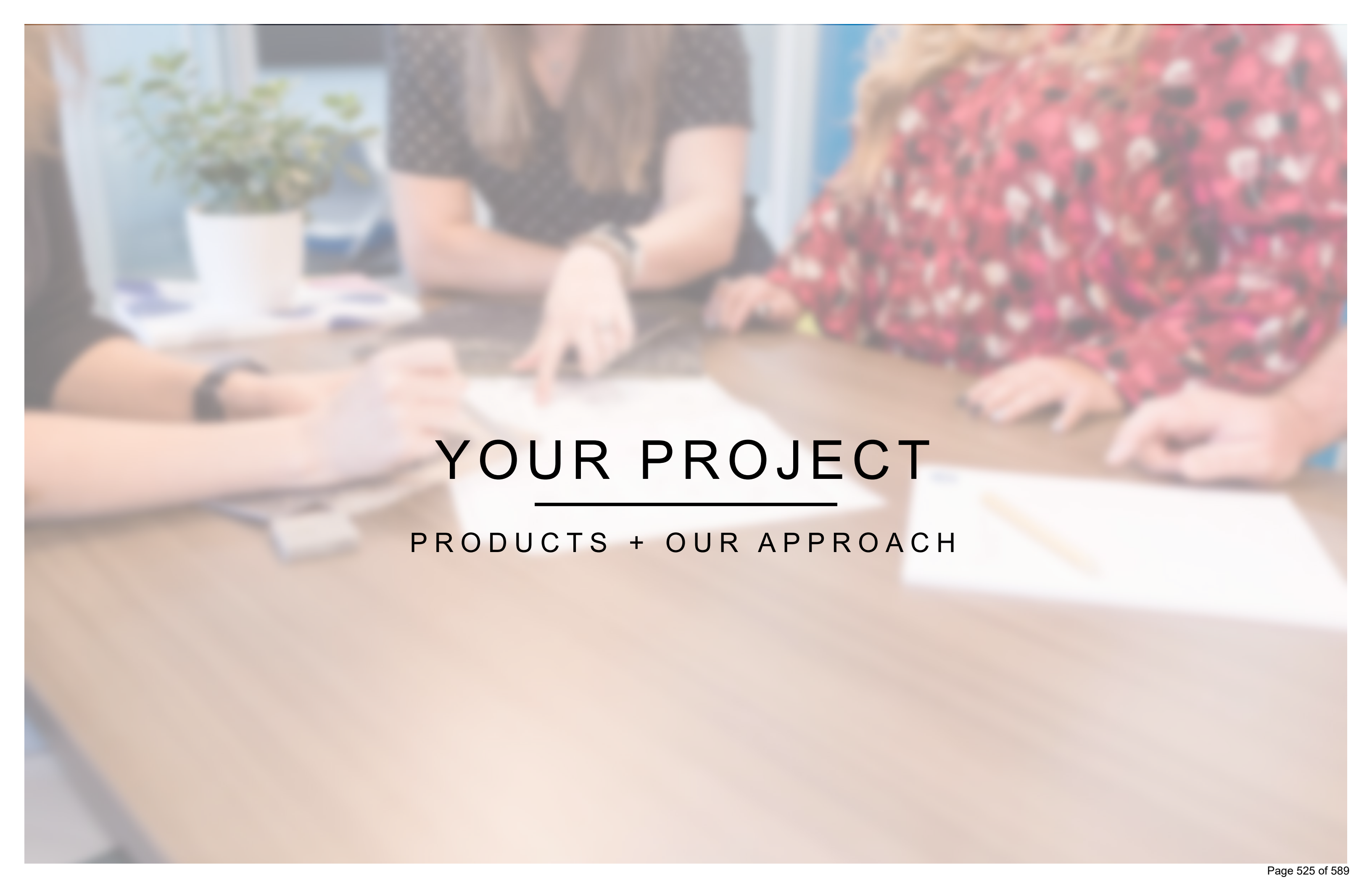
ZACH DENTON



MIKE CORY



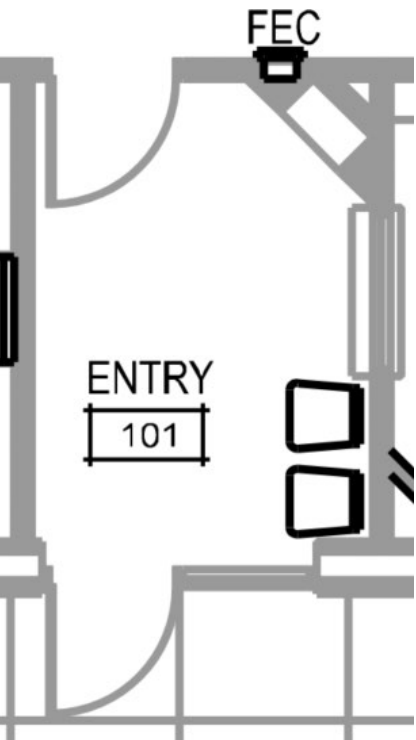
ELISE ROESLER



YOUR PROJECT

PRODUCTS + OUR APPROACH

ENTRY 101



GUEST / SIDE CHAIR

**Offices to Go
OTG3918B**

24.5w x 24d x 34h

polyurethane arms, black powder coated steel frame



Quilt
QL10 Black

RECEPTION 102

Laminate Table Tops Available immediately in the following finishes:



SIT / STAND DESK

Offices to Go
OTGHABASE3_
30 x 60" top Autumn walnut laminate (shown)
Dual Stage 4 programmable positions,
Tungsten finish

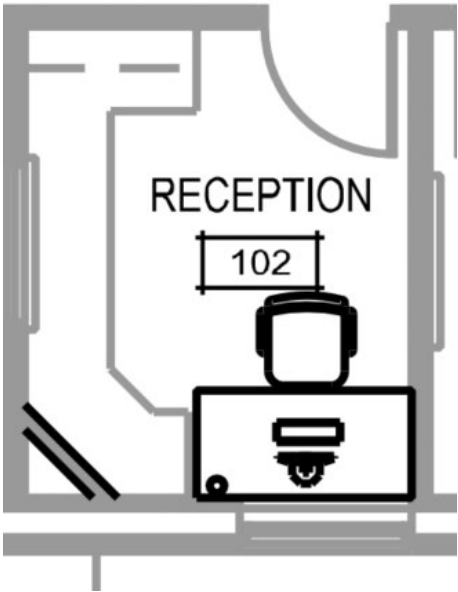


TASK CHAIR

Offices to Go
OTG10904B

Mesh Back Synchro-Tilter
Dimensions: 24w x 24d x 37.5h
Ergonomic Features: Tilt tension, tilt lock, seat height, arm height, synchro tilt, waterfall edge, proportioned cushioning

- Black mesh back with breathable Black air mesh seat
- Pneumatic seat height adjustment
- Adjustable lumbar support
- Height adjustable arms with self skinned urethane arm caps
- Synchro-tilt chair control with multiple position tilt lock and tilt tension adjustment
- Twin wheel carpet casters



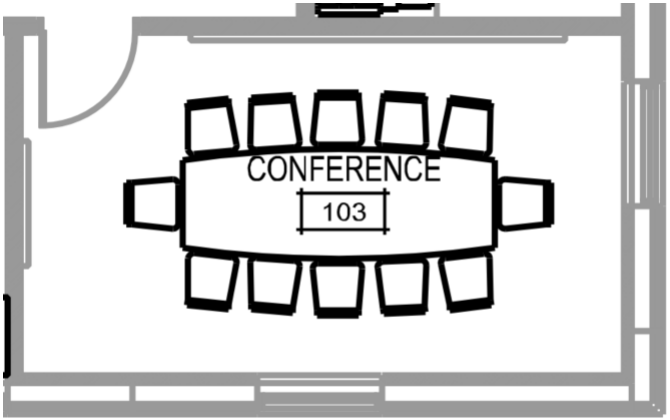
CONFERENCE 103



BOAT-SHAPED TABLE WITH INTEGRATED POWER

Global Zira Table + Base
Laminate conference table
Shown in Autumn walnut

Global Power Solutions
PRTMCS421B
Single Sided Recessed Power Block, 1 Power Duplex/USB-A&C
Module, 1 Telecom Knockout, Black, 10 ft power cord, clean
power access and routing through base.



EXECUTIVE SEATING

Offices to Go
OTG11776B
Tilt tension, tilt lock, seat height, waterfall seat,
contoured cushions, center tilt

Dimensions: 24.5w x 25d x 41.5h

- Black Luxhide upholstery with mock leather trim
- Pneumatic seat height adjustment
- Fixed height molded arms
- Single position tilt lock with tilt tension adjustment
- Twin wheel carpet casters



OFFICE 105 + 107

Laminate Table Tops Available immediately in the following finishes:



AWL
Autumn Walnut



AML
American Mahogany



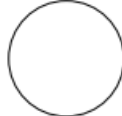
ADC
American Dark Cherry



AEL
American Espresso



AGL
Artisan Grey



WHI
White



Office 105 & 107

Offices to Go
SL7130DS
SL4824R

71"x30" Desk Shell (Laminate)
48"x24" Desk Return (Laminate)
Shown in Autumn Walnut (laminate options shown above)



TASK CHAIR

Offices to Go
OTG10904B

Mesh Back Synchro-Tilter
Dimensions: 24w x 24d x 37.5h
Ergonomic Features: Tilt tension, tilt lock, seat height, arm height, synchro tilt, waterfall edge, proportioned cushioning

- Black mesh back with breathable Black air mesh seat
- Pneumatic seat height adjustment
- Adjustable lumbar support
- Height adjustable arms with selfskinned urethane arm caps
- Synchro-tilt chair control with multipleposition tilt lock and tilt tension adjustment
- Twin wheel carpet casters

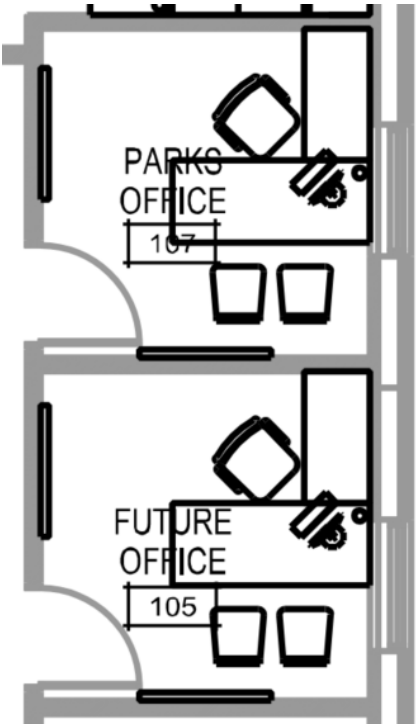


GUEST CHAIR

Offices to Go
OTG11760B

Mesh Back Guest Chair
Dimensions: 23.5w x 23.25d x 34h
Ergonomic Features: Waterfall edge

- Black mesh back with breathable Black mesh fabric seat
- Four leg design with molded armrests
- Does not stack



OFFICE 108 + 109

Laminate Table Tops Available immediately in the following finishes:



AWL
Autumn Walnut



AML
American Mahogany



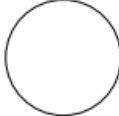
ADC
American Dark Cherry



AEL
American Espresso



AGL
Artisan Grey

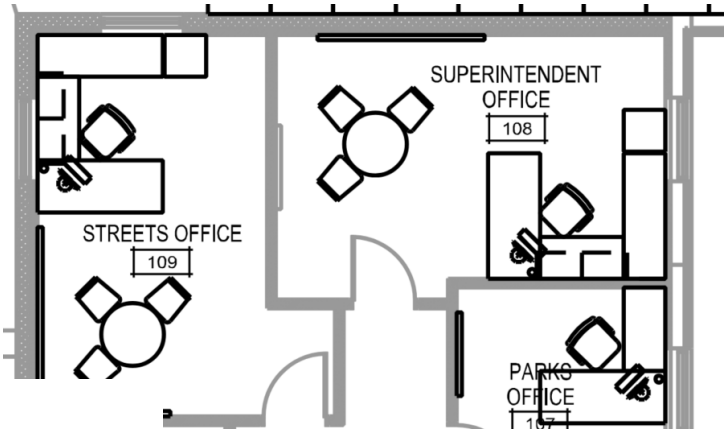


WHI
White



Office 108 & 109
SL7130DS, SL4824FB, SL7124CS, Z24L6WAL,
SL20CD, SL36WC, SL36SIDR, SL71TB, SL42R,
SL22BFM

- 71 x 30” laminate desk,
- 24 x 48” laminate bridge,
- 24 x 71” laminate credenza
- Mobile box file Pedestal laminate
- Accessories drawer
- Wall mounted laminate hutch with glass doors
- Wall mounted tackboard
- 24 x 24” Wardrobe cabinet laminate
- 42” Round Laminate table



TASK CHAIR

Offices to Go
OTG10904B

- Mesh Back Synchro-Tilter
Dimensions: 24w x 24d x 37.5h
Ergonomic Features: Tilt tension, tilt lock, seat height, arm height, synchro tilt, waterfall edge, proportioned cushioning
- Black mesh back with breathable Black air mesh seat
 - Pneumatic seat height adjustment
 - Adjustable lumbar support
 - Height adjustable arms with self skinned urethane arm caps
 - Synchro-tilt chair control with multiple position tilt lock and tilt tension adjustment
 - Twin wheel carpet casters



GUEST CHAIR

Offices to Go
OTG11760B

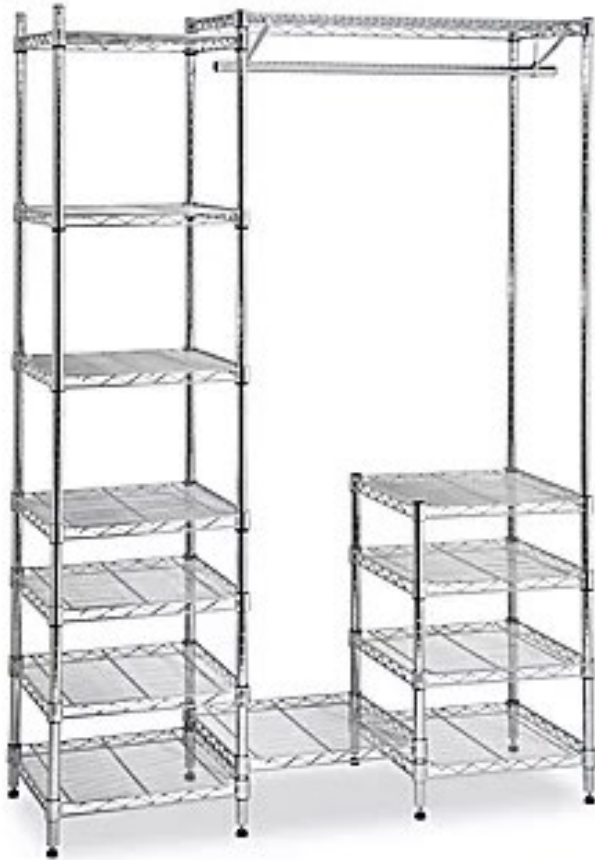
- Mesh Back Guest Chair
Dimensions: 23.5w x 23.25d x 34h
Ergonomic Features: Waterfall edge
- Black mesh back with breathable Black mesh fabric seat
 - Four leg design with molded armrests
 - Does not stack



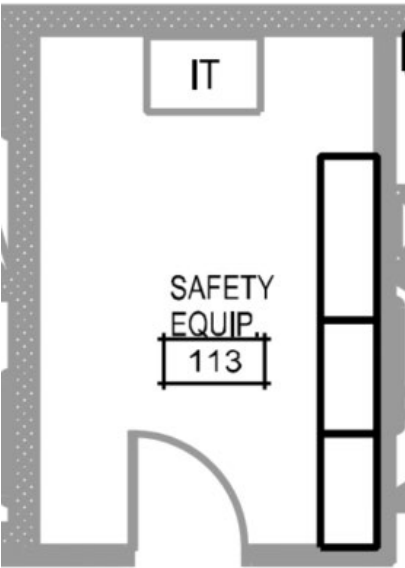
Storage Cabinet
Uline
36" x 18" x 72"



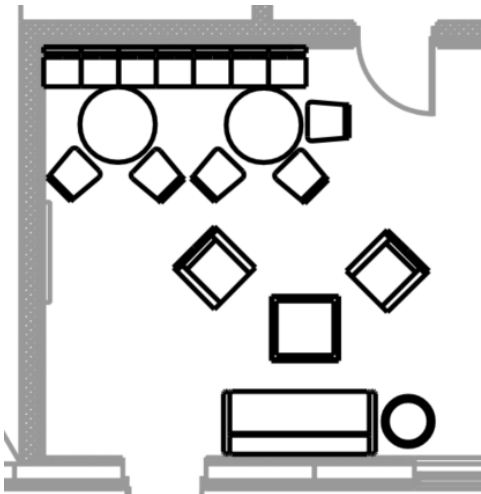
Quick Adjust Wire Shelving
Uline
36" x 18" x 63" Chrome



Garment Storage Center
Uline
52" x 18" x 72"



BREAKROOM 118 – BOOTH AREA



Café tables
Office to Go
SL36RDTOP &
OTGBASE3642

- x base in black or tungsten finish
- 36” round laminate top available in the finishes below

Laminate Table Tops Available immediately in the following finishes:



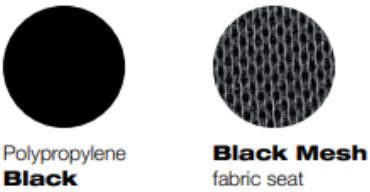
SIDE CHAIR

Office to Go
OTG11740B

Plastic Back Guest Chair
Dimensions: 24.5w x 22.5d x 34h
Ergonomic Features:

- Perforated plastic back with Black mesh fabric seat
- Oval tube chrome frame with molded armrests
- Can be stacked up to 5 high
- Packed 2 chairs per carton (priced each)

Available only in the following finish + textile:



BANQUETTE SEATING

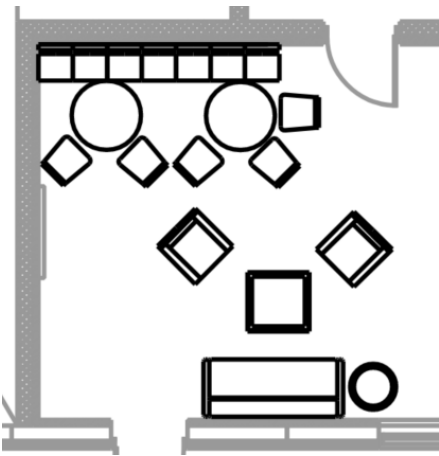
Global Venture Banquette, 48” & 78” bench to make the total required length

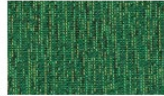
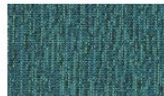
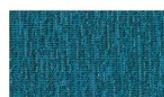
Priced in a grade 3

Options for feet finish: black, tungsten chrome, or latte

Dimensions:
Overall depth 28”
Overall height 48”
Seat Depth 19”
Seat height 18”
Back height from Seat 30”

BREAKROOM 118 – LOUNGE AREA



WAVELENGTH 100% Virgin Polyester		
		
WV01 Lime	WV02 Mint	WV03 Stone
		
WV04 Flame	WV05 Mykonos	WV06 Savannah
		
WV07 Mesa	WV08 Plasma	WV09 Cancun
		
WV10 Quartz	WV11 Moonrock	WV12 Rubine
		
WV13 Corfu	WV14 Bluejay	WV15 Panther



LOUNGE CHAIR

Offices to Go
OTG13053

Priced in Wavelength, shown left, also available in black luxhyde- faux leather

- Dimensions: 30.25w x 32.75d x 31.5h
- Cushions are reversible and removable
 - Tapered Black wood legs

Laminate Table Tops Available immediately in the following finishes:



SIDE / COFFEE TABLE

Offices to go
24”square side table & 36”square coffee table

Laminate: see color options above
Legs: tusten or black 15” metal legs



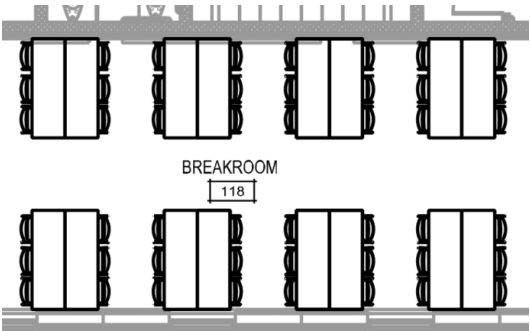
THREE SEAT SOFA

Offices to Go
OTG13053

Priced in Wavelength, shown left, also available in black luxhyde- faux leather

- Dimensions: 74.25w x 32.75d x 31.5h
- Cushions are reversible and removable
 - Tapered Black wood legs

BREAKROOM 118 – TABLES + CHAIRS



TRAINING TABLE

Offices to Go
OTGFTBASE71 & SL7124TOP

24" x 71" flip top tables

FEATURES

- Single lever activates flip top / nesting mechanism
- Accommodates 24" & 30" deep tops
- Equipped with 4 locking casters
- Modesty panel included
- Black (BLK) or Tungsten (TUN) finishes available
- Table top mounting screws included with base

Laminate Table Tops Available immediately in the following finishes:



NESTING TRAINING CHAIRS

Offices to Go
OTG11341B
Armless Mesh Back Flip Seat Nesting Chair

Available immediately in the following textile:

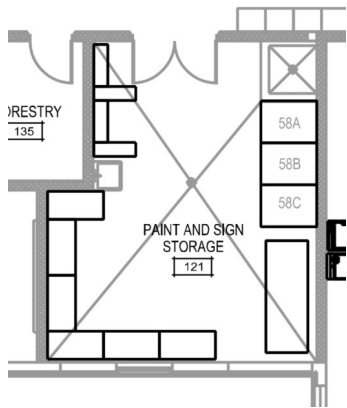


Black Mesh
fabric seat



See pages [116-121](#) for available textiles

PAINT + SIGN STORAGE 121



Shelf Bin Organizer
Uline
36" x 12 x 75



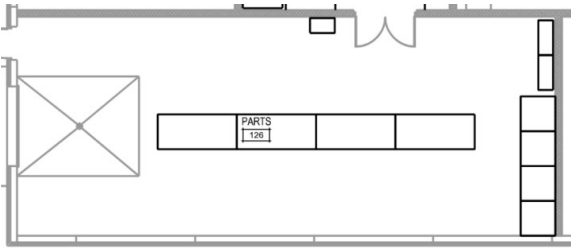
Vertical bar Rack
Uline
36" x 24 x 85



Heavy- Duty Steel Shelving
Uline
48" x 24" x 72"



Steel Assembly Table with Bottom Shelf
Uline
72" x 48"x 28-42"H



Storage Cabinet
Uline
30" x 18" x 72"



Two Shel Pallet Rack Starter
Uline
96" x42" x 96"

Pallet Rack Wire Decking
Uline
46"W x 42"D



Chrine Wire Shelving
Uline
42" x 18" x 96"



Two Shel Pallet Rack Starter

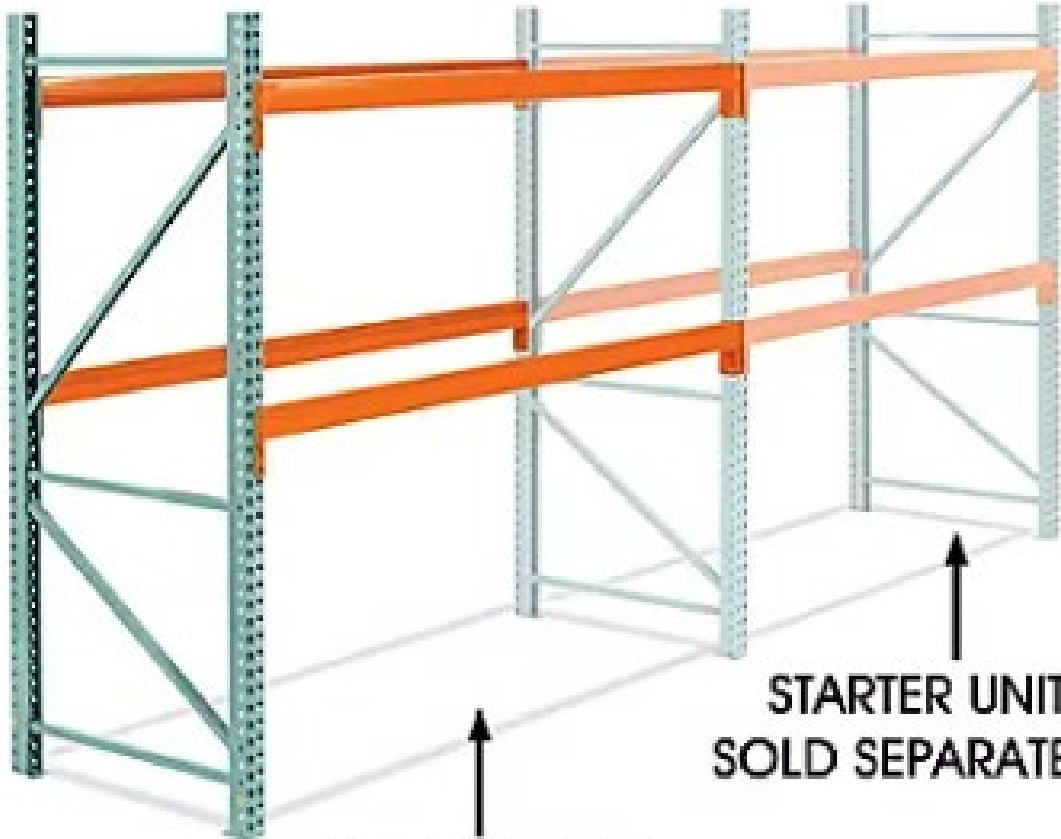
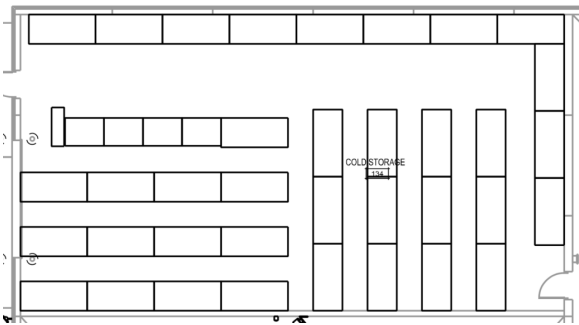
Uline

96" x42" x 96"

Pallet Rack Wire Decking

Uline

46"W x 42"D



ADD-ON UNIT

STARTER UNIT
SOLD SEPARATELY

Add on Units

Uline

96" x42" x 96"



Cantilever Rack- Single Sided

Uline

56" x 40" x 96"



Standard Flammable Storage
Cabinet 45 Gallon

Uline

43" x 18" x 65"



Single Pedestal Industrial Desk

Uline
H11146

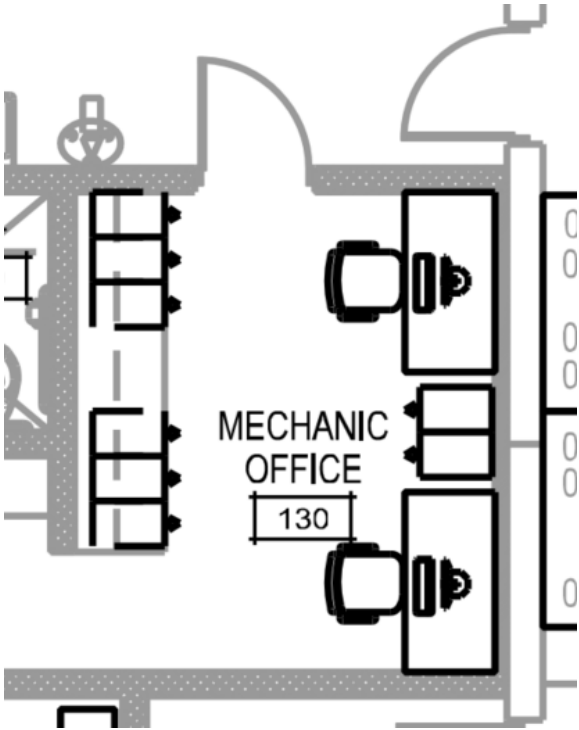
48" x 24" x 30"H



TASK CHAIR

Offices to Go
OTG10904B

- Mesh Back Synchro-Tilter
Dimensions: 24w x 24d x 37.5h
Ergonomic Features: Tilt tension, tilt lock, seat height, arm height, synchro tilt, waterfall edge, proportioned cushioning
- Black mesh back with breathable Black air mesh seat
 - Pneumatic seat height adjustment
 - Adjustable lumbar support
 - Height adjustable arms with self skinned urethane arm caps
 - Synchro-tilt chair control with multiple position tilt lock and tilt tension adjustment
 - Twin wheel carpet casters



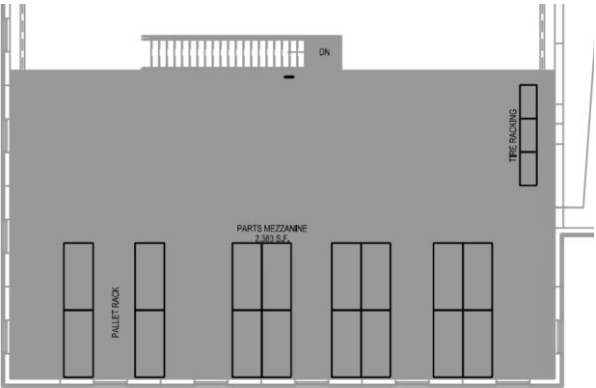


Two Shel Pallet Rack Starter
Uline
96" x42" x 96"



Pallet Rack Wire Decking
Uline
46"W x 42"D





Two Shel Pallet Rack Starter

Uline

48" x 24 x 96"



Add On for Two Shel Pallet Rack Starter

Uline

48" x 24 x 96"



Two Shel Pallet Rack Starter

Uline

96" x42" x 96"

Pallet Rack Wire Decking

Uline

46"W x 42"D



your project

PROJECT PRICING

Pricing notes
Assumed freight, delivery, warehousing and installation services are reflected in pricing..

Pricing is subject to change based on final specification, finish selection and floorplan.

Pricing does not include future 2025 manufacturer price increases.

Freight is estimated and subject to change based on rates at time of shipment.

Installation is estimated to include new furniture only. Removal of existing will be additional.

A note on industry lead times
The contract office furniture industry is experiencing extended lead times caused by supply chain issues due to volatility in sourcing raw materials, international tariffs, domestic freight carriers, and labor shortages. These rapidly changing variables are affecting all segments of manufacturing and are not within our control, but may result in order delays. Our team will continue to work diligently to closely monitor order lead times and will communicate status updates throughout the order fulfillment process.

\$98,949.69

Total Main Bid

Manufacturers Include: Offices to Go and Global on the Vizient Contract

Uline product not on contract with cost to facilitate procurement and Installation that assumes stair carry to mezzanine

1. explore

- Define project scope
- Determine project team
- Refine roles + responsibilities
- Discovery workshops
- Workplace surveys
- **Test + evaluate pilot spaces**

2. plan

- Socialize schedule
- Identify key milestones
- **Budget + schedule checks**
- Validate space requirements
- Concept review
- Product specification
- Finalize finish selection
- Installation drawings
- Quote formatted for review
- Delivery + install sequencing identified

3. provide

- Orders placed, tracked and reported
- Site verification
- Pre-install meetings
- Floorplan + installation drawings complete
- Installation schedule finalized
- **Communicate real-time progress**
- Order status reports

4. execute

- Product arrival
- Warehousing + delivery
- Walkthrough
- Project closeout
- Onsite services + training
- **First-day training / Move-in experience**

5. support

- Post-occupancy surveys
- Measure space against goals + intent
- Measure performance
- **Warranty + service maintained**
- Facility support



SCHEDULE

TIMELINE

Every project varies in size, scope and complexity. Your Project Management team will develop a project schedule that include all phases of the project from Design through Close. This will factor in all critical timeline components to ensure a successful project throughout, including all manufacturer lead times, shipping/transit time estimates and installation timelines. Each project's timeline is unique and will be developed at the start of the project.

We have strong relationships with our vendors and will work with your team and our vendor partners to ensure that products selected meet the project delivery dates to achieve your installation schedule.



12.16.24	COMPLETED BY 01.03.24	WEEK OF 01.06.25	WEEK OF 01.20.25	WEEK OF 04.14.25	MOVE IN 04.28.25
Project Award	Review and approve furniture plans	Create full specification file and preliminary price quote, if there are changes or adds	Client approves and issues purchase order	Product received and inspected, delivery and installation plan executed	Move-in experiences executed
Project team kick-off meeting, discuss roles & responsibilities	Finalize finish selections for client approval	Client approves final plan and preliminary installation schedule	Delivery and install sequencing identified	Onsite Project Management support	Measure space performance
Identify key milestones		Final quote checked for accuracy and sent to client for approval	Orders released to manufacturers	Installation complete, final walk-through with team to create punch list	Post occupancy support
Create project timeline			Track orders and communicate changes with project team		
Determine if you want to do a pilot program classroom. See pilot program page for more details on timing. This timeline tweaks slightly if you opt to do the program.			Conduct pre-install meeting		



A blurred background image of an office interior, showing several desks with computer monitors and ergonomic chairs. The image is in grayscale and has a soft, out-of-focus effect.

DELIVERY AND INSTALLATION

OUR SERVICES

PORTFOLIO OF BRANDS

Atmosphere’s parent company, Omni Work/Space, has distinctive brands that serve organizations in many ways, all with a focus on delivering superior products and services. Each brand demonstrates market-leadership in its category, and we are united under the core principle of building long-term business relationships.

With our portfolio of brands and Steelcase, Atmosphere is able to provide comprehensive support across *People, Process, Place & Technology*.

omni
WORK/SPACE

ATMOSPHERE
COMMERCIAL INTERIORS

EMERALD BLUE

MESO

CONNECT INTERIORS



DELIVERY + INSTALLATION

SERVICES OVERVIEW

Our sister company, **Emerald Blue**, an Omni Company, is a national leader in commercial services that understands today’s dynamic workspace needs and offers scale beyond our local markets. Our innovative solutions and breadth of services fueled by advanced technology make us the best, single-source partner.

With over 250 team members, we also leverage subcontract partnerships across the nation that allows us to scale our team as needed, no matter the project location. With the ability to leverage subcontractors, our team is still 90% direct employees, with up to 10% contract.

With over 40 years of experience to lean on, the strength of Emerald Blue lies within our heritage of excellence, quality, and bold vision to deliver a client-first experience by offering:

- + 500,000 sq/ft of racked, secure, climate-controlled distribution centers
- + 48 vehicle delivery fleet
- + 250 trained, in-house installation technicians
- + Rigorous safety & training programs
- + Technology-enabled processes
- + Proprietary software solutions for move and work order management
- + Rapid Continuous Improvement disciplines
- + 25-year recycling program that has processed over 36 million pounds of steel

10
DISTRIBUTION CENTERS

250
TEAM MEMBERS

40
YEARS IN BUSINESS

- FURNITURE INSTALLATION
- RECONFIGURATION
- COMMERCIAL RELOCATION
- FURNITURE DECOMMISSION
- STORAGE & ASSET MANAGEMENT
- MOVE, ADD, CHANGE
- IT MOVE SERVICES
- PROJECT MANAGEMENT





INSTALLATION SERVICES

Throughout our national service locations, our installation crew is comprised of over 250 team members and self performs approximately 90% of all project work. Jobs are managed and supervised by experienced lead team members and when larger projects require additional support, subcontractors are hired. Our differentiation in the marketplace is the investment we make in our trained, professional team members and performance & safety measures.

All employee and contract installers are trained on a variety of furniture systems and installation applications across manufacturers, including Steelcase, MillerKnoll, Haworth, HON, and Allsteel.

As a national leader in commercial services, we understand today’s dynamic workspace needs and offer scale beyond our local markets. Our innovative solutions and breadth of services fueled by advanced technology make us **your best, single-source partner.**

Your Installation Project Manager will develop a master plan to manage the details of project phasing, product receiving, and installation schedules. We will then coordinate with the team to meet each pre-installation milestone, including:

Delivery and Inspection

- + Direct to site- If volume allows, product will be phased and loaded onto trucks. We will communicate with building management and contractors to coordinate delivery logistics, staging, permits, and utility considerations. Saves time and money.
- + Warehouse delivery- product can also be received into our warehouse. This allows us to receive, consolidate, store and sequence product for future deliveries.
- + Inspection- All products received are inspected to ensure condition.

Damaged Materials

- + Swift replacement and/or repair on damaged goods are implemented for project move-in and site readiness.

Pre-Install Meetings

- + Pre-installation meetings are scheduled and lead through your Installation Project Manager. The Project Manager will review project requirements, schedules, and work plans with the project team to ensure clear communication and expectations are maintained throughout the duration of the project.
- + On-site visits are completed before, during, and after installation.

Electrical and low voltage

- + We will partner with the electrical and low voltage provider to ensure they have accurate information on product specifications, and the furniture installation timeline for an efficient and effective sequencing.

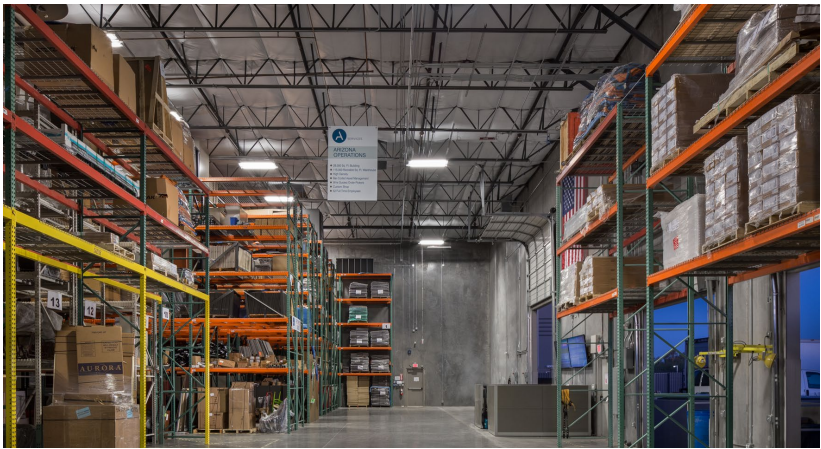
OUR SERVICES

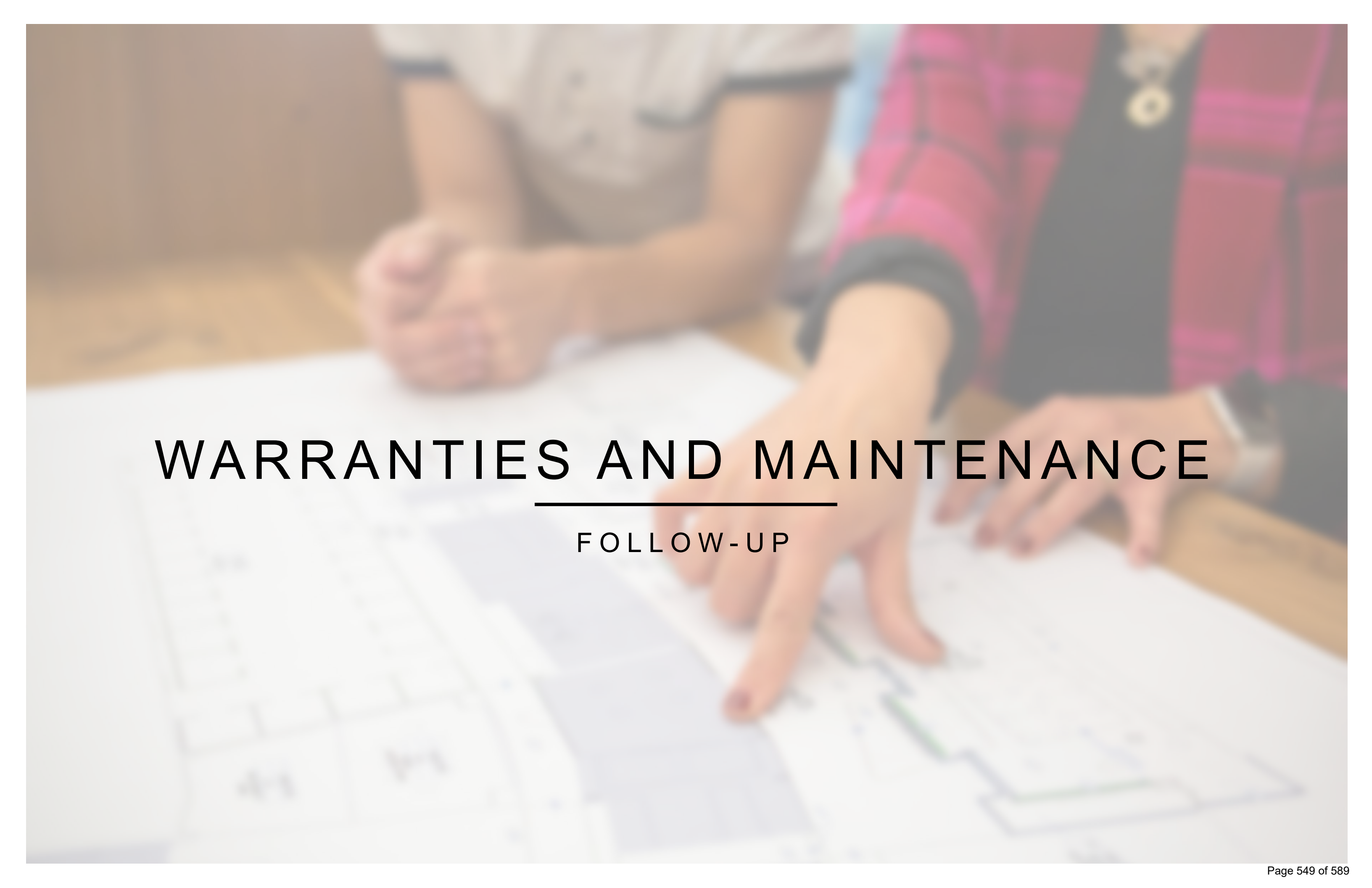
PROJECT MANAGEMENT SERVICES

A well-executed project is based on effective communication, structured workflows, and strong project management. As an extension of your team, Atmosphere will coordinate all project deliverables from initiation through completion. With the highest quality performance standards, every member of our team contributes to the overall project goal to deliver your new furniture products and allow for a seamless transition into your new space.

Our Project Management services include:

- + Coordination with other trades
- + Construction + install meetings
- + Site readiness evaluation
- + Progress reports
 - Install checklist
 - Typical install packets
- + Punch List follow-up + resolution





WARRANTIES AND MAINTENANCE

FOLLOW-UP

WARRANTIES + MAINTENANCE

PUNCH & WARRANTY

Install and Punch-list

- + Our team assembles and arranges the furnishings
- + Issues are immediately recorded to ensure prompt resolution and satisfactory project completion.

Close out

- + Our close-out process ensures that the project site is ready for occupancy through trash removal, light product and glass cleaning, and product adjustments.

PlanGrid is a construction application- upload floorplans, product data, and notes for and with our field team. We practice perpetual punching of projects. Documenting and addressing any issues as soon as discovered and once an area is completed. PlanGrid is used to document any punch items during installation and allows us to create a report tracking until resolved. We will send daily field reports with pictures to see installation progress.



LAURIE LAWRENCE
Warranty Specialist, *Atmosphere*

With 30+ years of experience in client services and expertise managing warranty requests, Laurie’s direction and attention to detail delivers an exceptional client experience.

Laurie can assess any product issues to see if they qualify for a warranty claim. She is well-versed in labor requests and can quickly schedule a repair or replacement.



VENDOR WARRANTIES

Our vendor partners are chosen for their commitment to providing quality products and superior value, shipped on time and complete. We are proud to offer their innovative solutions to meet your furniture, architectural, and audiovisual needs.

Specific warranty information will be provided for vendors chosen in final furniture solution.

MANUFACTURER INFORMATION

GLOBAL FURNITURE GROUP

Global Furniture Group originated in 1966 when the company was founded with the vision of manufacturing well-made office furniture at affordable prices. That promise continues today through a network of vertically integrated suppliers, manufacturers, and distributors who bring our products to market around the world.

Global offers a comprehensive portfolio of solutions designed and engineered to meet the changing needs of the Workplace, Education, and Healthcare markets. Our success over the past half-century owes much to our diverse team, who take pride in creating quality products and providing our clients the highest level of service.

Above all, Global is a trusted partner. We are committed to our customer's needs by working together to develop lasting and valued solutions

GLOBAL LIMITED LIFETIME WARRANTY

Global warrants that all commercial products are free from defects in material and workmanship, for the life of the product, to the original purchaser. Global will repair or replace, at Global's option, as the sole remedy for any defect covered by the warranty. For detailed conditions, refer to the current Global Price List.

This warranty covers the following product categories.

- General Seating
- Filing
- Panels
- Desks, Modular Furniture and Tables

[FULL WARRANTY DETAILS](#)



MANUFACTURER INFORMATION

OFFICES TO GO

With all the sophisticated styles offered at Offices to Go it's easy for the budget minded business to purchase high-quality office furniture at the right price.

Offices to Go™, a division of Global Furniture Group, has been a primary source of value-minded office furniture solutions since its inception in 2006. We offer a wide variety of products including seating, desks, tables, and ergonomic accessories. Offices to Go products offer high-value and are built to commercial quality standards to protect your long-term investment. All Offices To Go products are manufactured exclusively in certified factories and have been tested in compliance with ANSI and BIFMA standards. We are committed to producing products in the most sustainable ways and ensuring they pass strict quality testing.

OFFICES TO GO WARRANTY

Offices to Go® warrants its products to be free from defects in material and workmanship subject to the limitations below. This warranty is made by Offices to Go® only to original end-user customers acquiring the product directly from authorized Offices to Go® dealers. The customer's sole remedy under this warranty is limited to repair or replacement at Offices to Go®'s option. Consent from Offices to Go® must be obtained before any warranty work is performed. This warranty shall not apply to any products which must be replaced due to normal wear and tear, negligence, abuse or "accident", shipping damage or product use other than in accordance with written instructions or warnings. It will also not apply when a product has been modified or altered, repaired or refurbished by someone other than Offices to Go®. This warranty does not cover the cost of transportation or labor. Offices to Go® can make no warranty that any of its products are suitable for any particular purpose and can make no other warranties, expressed or implied. In no event shall Offices to Go® be liable in either tort or contract for any loss or direct, special, incidental, consequential or exemplary damages.

[FULL WARRANTY DETAILS](#)



WARRANTIES + MAINTENANCE

POST-INSTALLATION SERVICES

Reconfiguration

Optimize re-use of your furniture assets to meet changing work needs. This would include inventorying existing products, creating over/under balance to specify new product/parts requirements, dismantling and rebuilding existing products, and applying new, existing, and/or stored products to implement furniture plan.

Electronic Ordering

With electronic ordering you can efficiently transmit orders, reports, invoices, etc., from your computer to your Steelcase dealers' computer.

Punch List Coordination Services

Identification of any discrepancies to complete furniture installation in compliance to furniture plan, including issuing punch list and updating punch list with resolution and completion. Our project managers use PlanGrid, a top-rated construction application, to record and track installation issues in real-time, expediting the time to resolution. The application stores floorplans, product data, photos, and notes, and provides reports and task management.

Inventory Asset Management

Typically includes full-service customer storage, inventory management, inventory-list maintenance, condition reports, and movement history. SnapTracker, our web-based inventory tracking and management software provides customized reporting and analysis. Using bar code technology, SnapTracker captures strategic cost control metrics.

Alternative Office Design

is a planning service that includes analysis and related planning services as they relate to business results and facilities issues.

Emergency Services

Some dealers offer emergency services including keys locked in desk, electrical failures, broken chair mechanisms, and any condition threatening safety or productivity.

Educational Seminars

Steelcase dealers will conduct seminars concerning end user personnel training in proper and safe use of furniture, business trends and their effects in the workplace, end user education in ergonomic support tools and instruction in furniture care and maintenance.





thank you
ATMOSPHERE



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Tom Williamson, Public Works Superintendent

RE: Review and possible action relating to the purchase of service shop equipment for the new Public Works and Parks Operations Facility (Williamson, Superintendent Public Works)

BACKGROUND

The Public Works and Parks Operations Facility Project, approved for construction by the City Council in the spring of 2024, is well underway. Overall facility construction commenced in March 2024 and has now been slated for building completion in February 2025. As a result, Department staff feel it is necessary to commit to the purchase of mechanics shop equipment required to properly outfit the new facility in anticipation of a fast approaching move-in date.

DISCUSSION

The new facility mechanics shop requires the purchase of heavy-duty shop equipment as part of our owner's responsibilities in the final completion of the Public Works and Parks Operations Facility. These items include heavy-duty mobile vehicle lifts and associated attachments, a 50 ton floor press to replace a 60-year-old failed press, a heavy-duty drain oil hauler, and a floor scrubbing machine to keep the shop and parking areas clean. As a result of these needs, the Department Superintendent and the Lead Mechanic researched and reached out to suppliers, local and abroad, to request proposals for the purchase of these items. Staff also met and spoke with the Stoughton Public Works Department about their recent purchases, and service record, of the new items they are using to clarify what would be the wisest investment for the City of Fort Atkinson. We received three proposals for the needed items, one from Midwest Equipment Specialists of McFarland, Wisconsin, and two from Lift Now of Yorktown Heights, New York.

Also included with this memorandum and purchase is a correction to the City Council's approved purchase of the Snap-On Tilt Back Heavy Duty Tire Changer that the Department ordered on November 20, 2024. At the November 19th meeting, staff presented a memo to the Council requesting to replace our failed tire changer with a new unit from Snap-On for the amount of \$8,618.40. Shortly after placing the order and receiving the new unit, staff were informed of a misinterpretation of the proposal from Snap-On and used the discount amount as the sales amount. The proposal attached shows the original document and staff's red-line

calculations to help clarify. Staff reached out to Snap-On explaining the situation and noting the lack of clarity in their proposal leading to the mistake. They were unable to allow any further cost reductions. The amount that should have been addressed with the Council in November is \$11,901.60 (a difference of \$3,283.20).

FINANCIAL ANALYSIS

The proposals received for the additional shop equipment were \$120,772.90 from Lift Now for the Mahle lifts and associated equipment, \$138,853.92 from Midwest Equipment for the Stertil Koni lifts and associated equipment, and a high bid of \$141,465.62 from Lift Now for the Challenger lifts and associated equipment. The attached bid documents show a more detailed look at the bids.

Staff has reviewed the bids and information associated with the purchase of these heavy-duty lifts and have weighed the recommendations by the Stoughton DPW, and recommends that the Council approve the middle bid of \$138,853.92 based upon the proven track record, increased lifting heights, and local serviceability. Staff believes having the distributor's office and service location in McFarland is a benefit to the department. Staff requests approval for the revision to the previously approved Snap-on purchase order to reflect the proper sale amount of \$11,901.60, an increase of \$3,283.20.

The table below shows the total budget for FFE, the amount spent to date, the amount and category of the current request, as well as the balance. As one can see from this table, if this request is approved, the balance in the equipment category will be \$90,242.01. The balances in the furnishings and fixtures categories are \$126,846.60 and \$85,000, respectively. Staff continues to review the FFE needed to purchase for this project and anticipates returning to the City Council to authorize additional purchases in the future.

CATEGORY	BUDGET	SPENT TO DATE	THIS REQUEST	BALANCE
FURNISHINGS	\$ 210,000.00	\$ -	\$ 83,153.40	\$ 126,846.60
Desks, Tables, Chairs				
Racking and Storage				
Misc Storage				
Moving Expenses				
FIXTURES	\$ 85,000.00	\$ -	\$ -	\$ 85,000.00
Appliances				
Audio Visual Equip				
Network Installation				
Instalation Expenses				
EQUIPMENT	\$ 250,000.00	\$ 17,620.87	\$ 142,137.12	\$ 90,242.01
Tire Changer				
Hydraulic Press				
Rolling Lifts				
Prod./Fab. Tools				
Floor Scrubber				
Brine Tank				
Pump Shed				
TOTALS	\$ 545,000.00	\$ 17,620.87	\$ 225,290.52	\$ 302,088.61

RECOMMENDATION

Staff recommends awarding the shop equipment contract to Midwest Equipment Specialists in the amount not to exceed \$138,853.92, and approving the \$3,283.20 increase to the previously approved purchase price of \$8,618.40 for the purchase of a Snap-On Heavy Duty Tilt Back Tire Changer using funds borrowed and budgeted for the 2024 Public Works and Parks Operation Facility project.

ATTACHMENTS

1. Lift Now Mahle Lifts
2. Lift Now Challenger Lifts
3. Midwest Equipment Specialists
4. Snap On Bid Red Lined 20241212

* Not Equal Equipment To Sterile Koni *

Liftnow

Estimate

www.liftnow.com
sales@liftnow.com - Fax: 914-734-7479
1-800-LIFTNOW

Date:
Quote #:
Sales Rep

8/7/2024
SW
Fl-Atkinson
Spencer Patino

Customer:

City of Fort Atkinson - DPW
600 Talcott Ave
Fort Atkinson WI 53535
Attn: Don Knaack or Tom Williamson
920-397-9909

Sourcewell Member ID: #177492

Qty	Description	List Price	Sourcewell Price
1	Mahle CML-9x6 - 57 ton (114,000 lb.) Commercial Vehicle Mobile Column Lift - Wireless (Set of 6), 24 Volt DC, Control Box on Every Column with Adjustable Forks, 5-24.5" Serviceable Wheel Diameter **MADE BY GRAY MANUFACTURING**	\$160,007.83	\$78,243.83
1	Mahle CTJ-2700H - 2,700 lb. Commercial Vehicle Transmission Jack - High Rise **MADE BY GRAY MANUFACTURING**	\$14,304.41	\$6,994.86
1	Mahle CAD-240ML - Snow plow adapter for Wireless Mobile Column Lift **MADE BY GRAY MANUFACTURING**	\$9,307.95	\$4,551.59
1	Mahle GAB-06 - Cross Beam Adapter **MADE BY GRAY MANUFACTURING**	\$5,046.74	\$2,880.03
4	Mahle CSS-10T - 10 ton Commercial Vehicle Support Stand (Pair) - Tall **MADE BY GRAY MANUFACTURING**	\$3,720.60	\$1,819.37
4	Mahle CVS-9H - 9 ton Vehicle Support Stand - High Rise **MADE BY GRAY MANUFACTURING**	\$13,572.68	\$6,637.04
1	OTC High Wheel Dolly - 1,100 Lb. Capacity, 42" Lifting Range - Sourced Product. Freight Below	\$11,420.00	\$5,584.38
1	Mahle CAD-EL - Multipurpose Frame Engaging Adapter with Extensions, Fore and Aft Lifting **MADE BY GRAY MANUFACTURING**	\$5,968.61	\$2,918.65
1	American Forge and Foundry - 50 Ton Super Duty Shop Press. Freight Below	\$7,608.41	\$4,184.63
1	Global Industrial Floor Scrubber - Auto Floor Scrubber with Traction Drive, 26" Diameter Cleaning Path. Includes Heavy Duty Cast Aluminum Squeegee, 18.5-Gallon Solution and 21-Gallon Recovery Tank, Two 13" Decks and two 12V Batteries, Battery Charger - Sourced Product. Freight Below	\$11,895.00	\$7,731.75
1	Balcrank Truck Drain 4120-006 38 Gallon Capacity with metal catch screen and anti splash baffle. Two Outlet Ports with Ball Drain Valve and Cam-Lock Coupler - Sourced Product. Freight Below	\$1,696.00	\$1,356.80

- Column Hoist
Less Serviceability
Reviews - more connectivity problems
Lower Lift height
- Snow plow Adapter
Not traversable / needs to be setup around tires - heavy -
- Jack Stands
Angle iron not tube steel - quality -
Less height adjustments, Tilt & Roll design vs Roll design - Heavy 90-140# each
- Transmission Jack
Less Lifting Capacity, Bracket Attachment Not Straps Less Versatile

Special Notes and Instructions

PLEASE ADD SALES TAX, ELECTRICAL HOOK-UP, AIR HOOK-UP, REMOVAL OF EXISTING EQUIPMENT AND ANY CONCRETE WORK, IF NECESSARY, IS THE RESPONSIBILITY OF THE CUSTOMER. (UNLESS OTHERWISE SPECIFIED ABOVE). CUSTOMER IS ALSO RESPONSIBLE FOR THE PRESENCE OF ANY AND ALL SUB-SURFACE FEATURES OR CONDITIONS INCLUDING BUT NOT LIMITED TO ROCK, LEDGE, GROUND WATER, CONCRETE OF GREATER THAN 6" THICKNESS, AIR, UTILITY OR RADIANT HEATING LINES WHICH MAY REQUIRE RELOCATION OR REPAIR. REMOVAL OR DISPOSAL OF ANY CONTAMINATED SOIL, IF PRESENT, IS THE RESPONSIBILITY OF THE OWNER OF THE PROPERTY. ANY PERMITS, FILINGS OR FEES ARE THE RESPONSIBILITY OF THE CUSTOMER. CUSTOMER IS RESPONSIBLE FOR HAVING A FORKLIFT TO UNLOAD AND RECEIVE THE SHIPMENT. PRICES ARE GOOD FOR 30 DAYS. ADD 4% IF USING CREDIT CARD. MUST SIGN CHARGEBACK AGREEMENT AND AUTHORIZATION.

Sourcewell
Awarded Contract
Contract # 121223-LFT

Subtotal \$245,350.23
Discount \$122,467.30
Freight \$750.00
Total \$123,632.93

This is only an estimate. The total will be assessed at the time of purchase order and verified for any changes.

120,772.90

Above information is not an invoice and only an estimate of services/goods described above.

Please confirm your acceptance of this quote by signing this document.

Signature _____
Print _____
Date _____

MAHLE

Driven by performance

WIRELESS MOBILE COLUMN LIFT SYSTEM

In partnership with Gray, our wireless lift systems will lift a wide variety of vehicles allowing technicians to safely and efficiently complete preventative maintenance tasks to major component repair.

Manufactured by



CML-7

www.servicesolutions.mahle.com

ShopPRO®

SAFE AND EFFICIENT

The patented Gray Wireless Portable Lift System improves a shop's safety, productivity and flexibility. The wireless lift system family will lift a wide variety of vehicles allowing technicians to safely and efficiently complete preventative maintenance tasks to major component repair.

Features

HEAVY DUTY LIFTING CAPACITY.

14,000 lb (CML-7) and 19,000 lb (CML-9) per column capacity options. Wide base available in 19,000lb capacity (CML-9W)

INTELLIGENT.

Patented Wireless Smart Lift Technology

SIMPLE.

Tablet based touch screen with on-board manuals, videos and internet

ELECTRIC.

24 volt DC system

BROAD APPLICATION.

Heavy Duty through Light Duty vehicles.

FULLY ADJUSTABLE CARRIAGE.

12" forks supports wheel diameter from 5" to 24.5"

PATENT PENDING.

Down-stop visual safety system

ADJUSTABLE.

Lift height 69" (1753 mm)

485 80094 00 LIFT COLUMN CML-7 WIRELESS (7 TON)

485 80098 00 LIFT COLUMN CML-9 TON WIRELESS (9.5 TON)

485 80102 00 LIFT COLUMN CML-9W WIDE BASE (9.5 TON)

FEATURE COMPARISON

	CML-7	CML-9	CML-9W
Certification	ALI Certified	ALI Certified	ALI Certified
Capacity (Each)	14,000 lb (6,350 kg)	19,000 lb (8,165 kg)	19,000 lb (8,165 kg)
Max. Hydraulic Operating Pressure	2,180 psi (15 MPa)	2,600 psi (17.9 MPa)	2,600 psi (17.9 MPa)
Min/Max Wheel Diameter	5 in / 24.5 in (127 mm / 622 mm)	5 in / 24.5 in (127 mm / 622 mm)	4 in (102mm) - No Max
Min (2)/Max (4) Lift Height	32 in / 69 in (813 mm / 1,753 mm)	32 in / 69 in (813 mm / 1,753 mm)	32 in / 69 in (813 mm / 1,753 mm)
Lift Speed (Max.Load)	60 in/min (1,524 mm/min)	60 in/min (1,524 mm/min)	60 in/min (1,524 mm/min)
Weight	1,485 lb (674 kg)	1,510 lb (685 kg)	1,575 lb (714 kg)
Height	88.5 in (2,248 mm)	88.5 in (2,248 mm)	88.5 in (2,248 mm)
Height at Full Lift	157.13 in (3,991 mm)	157.13 in (3,991 mm)	157.13 in (3,991 mm)
Operating Peak Power	4 HP (3 kW)	4 HP (3 kW)	4 HP (3 kW)
Operating Voltage	24 VDC Nominal	24 VDC Nominal	24 VDC Nominal
Charger Voltage Required	70-130 VAC @50-60 Hz	70-130 VAC @50-60 Hz	70-130 VAC @50-60 Hz

ShopPRO®

MSS-2-218



Products > Vehicle Support Stands > 9-THR

9-THR

9-THR

Gray Manufacturing's high-rise vehicle support stands are used with high-rise lifts to secure a vehicle for axle, tire or spring work.

SKU: model 9-thr

CALL FOR PRICING



Features:

- Gas-spring assisted lift post
- Heavy duty urethane wheels
- 5 1/2" lift pad screw adjustable range
- ETL Listed
- Made in the U.S.A

PRODUCT DESCRIPTION

SPECIFICATIONS

9-THR	US Units	Metric
Capacity (Each)	18,000 lbs	8,164.66 kg
Minimum Start Height	48 3/4"	123.83 cm
Maximum Lift Height	84"	213.36 cm
Adjustment Increments	2 3/4"	6.99 cm
Screw Extension	5 1/2"	13.97 cm
Shipping Weight	145 lbs	65.77 kg
Base	30" x 33"	76.2 cm x 83.82 cm



Products > Vehicle Support Stands > 10-THR

10-THR

10-THR

Gray Manufacturing's high-rise vehicle support stands are used with high-rise lifts to secure a vehicle for axle, tire or spring work.

SKU: model-10-thr

CALL FOR PRICING



Features:

- Gas-spring assisted lift post
- Heavy duty urethane wheels
- 2-3/4" lift pad screw adjustable range
- ETL Listed
- Made in the U.S.A

PRODUCT DESCRIPTION

SPECIFICATIONS

10-THR	US Units	Metric
Capacity (Each)	20,000 lbs	9,071.85 kg
Base	21-3/4" x 21-3/4"	55.25 cm x 55.25 cm
Minimum Start Height	53-3/8"	135.57 cm
Maximum Lift Height	72-1/8"	183.20 cm
Adjustment Increments	2-3/4"	6.99 cm
Screw Extension	2-3/4"	6.99 cm
Shipping Weight	115 lbs	52.16 kg



Estimate

www.liftnow.com
sales@liftnow.com - Fax: 914-734-7479
1-800-LIFTNOW

Date:
Quote #:
Sales Rep

8/13/2024
SW
Ft-Atkinson-CL
Spencer Patino

Customer:
City of Fort Atkinson - DPW
600 Talcott Ave
Fort Atkinson WI 53535
Attn: Don Knaack or Tom Williamson
920-397-9909

Sourcewell Member ID:#177492

Qty	Description	List Price	Sourcewell Price
1	Challenger CLHM-190-6 - 57 ton (114,000 lb.) Commercial Vehicle Mobile Column Lift - Wireless (Set of 6), 24 Volt DC, Control Box on Every Column with Adjustable Forks, 5-24.5" Serviceable Wheel Diameter **MADE BY GRAY MANUFACTURING**.. Includes Additional Incentive	\$143,819.34	\$86,251.84
1	Challenger CLHM-HTCJ-2000 - 2,700 lb. Commercial Vehicle Transmission Jack - High Rise **MADE BY GRAY MANUFACTURING**	\$28,990.42	\$10,975.69
1	Challenger CLHM-SP-240 - Snow plow adapter for Wireless Mobile Column Lift **MADE BY GRAY MANUFACTURING**	\$11,743.76	\$7,698.62
1	Challenger CLHM-CB-32A - Cross Beam Adapter **MADE BY GRAY MANUFACTURING**	\$8,409.16	\$5,936.34
4	Challenger CLHM-10-THF - 10 ton Commercial Vehicle Support Stand (Pair) - Tall **MADE BY GRAY MANUFACTURING**	\$5,688.26	\$3,023.30
4	Challenger CLHM-9-THR - 9 ton Vehicle Support Stand - High Rise **MADE BY GRAY MANUFACTURING**	\$16,865.08	\$10,855.49
1	OTC High Wheel Dolly - 1,100 Lb. Capacity, 42" Lifting Range - Sourced Product. Freight Below	\$11,420.00	\$5,584.38
1	Challenger CLHM-ELA-90A - Multipurpose Frame Engaging Adapter with Extensions, Fore and Aft Lifting **MADE BY GRAY MANUFACTURING**	\$6,835.60	\$3,053.12
1	American Forge and Foundry - 50 Ton Super Duty Shop Press. Freight Below	\$7,608.41	\$4,184.63
1	Global Industrial Floor Scrubber - Auto Floor Scrubber with Traction Drive, 26" Diameter Cleaning Path, Includes Heavy Duty Cast Aluminum Squeegee, 18.5-Gallon Solution and 21-Gallon Recovery Tank, Two 13" Decks and two 12V Batteries, Battery Charger - Sourced Product. Freight Below	\$11,895.00	\$7,731.75
1	Balcrank Truck Drain 4120-006 38 Gallon Capacity with metal catch screen and anti splash baffle. Two Outlet Ports with Ball Drain Valve and Cam-Lock Coupler - Sourced Product. Freight Below	\$1,696.00	\$1,356.80

Special Notes and Instructions

PLEASE ADD SALES TAX, ELECTRICAL HOOK-UP, AIR HOOK-UP, REMOVAL OF EXISTING EQUIPMENT AND ANY CONCRETE WORK, IF NECESSARY, IS THE RESPONSIBILITY OF THE CUSTOMER. (UNLESS OTHERWISE SPECIFIED ABOVE). CUSTOMER IS ALSO RESPONSIBLE FOR THE PRESENCE OF ANY AND ALL SUB-SURFACE FEATURES OR CONDITIONS INCLUDING BUT NOT LIMITED TO ROCK, LEDGE, GROUND WATER, CONCRETE OF GREATER THAN 6" THICKNESS, AIR, UTILITY OR RADIANT HEATING LINES WHICH MAY REQUIRE RELOCATION OR REPAIR. REMOVAL OR DISPOSAL OF ANY CONTAMINATED SOIL, IF PRESENT, IS THE RESPONSIBILITY OF THE OWNER OF THE PROPERTY. ANY PERMITS, FILINGS OR FEES ARE THE RESPONSIBILITY OF THE CUSTOMER. CUSTOMER IS RESPONSIBLE FOR HAVING A FORKLIFT TO UNLOAD AND RECEIVE THE SHIPMENT. PRICES ARE GOOD FOR 30 DAYS. ADD 4% IF USING CREDIT CARD. MUST SIGN CHARGEBACK AGREEMENT AND AUTHORIZATION.



Subtotal	\$254,965.03
Discount	\$110,913.07
Freight	\$750.00
Total	\$144,801.96

This is only an estimate. The total will be assessed at the time of purchase order and verified for any changes.

141,465.62

Above information is not an invoice and only an estimate of services/goods described above.

Please confirm your acceptance of this quote by signing this document.

Signature _____
Print _____
Date _____

HEAVY-DUTY MOBILES CLHM SERIES

Our MobileHD columns are capable of lifting 14,000 or 19,000 lbs. per column on any solid surface.*

REQUIREMENTS

 **14' 8" MINIMUM**

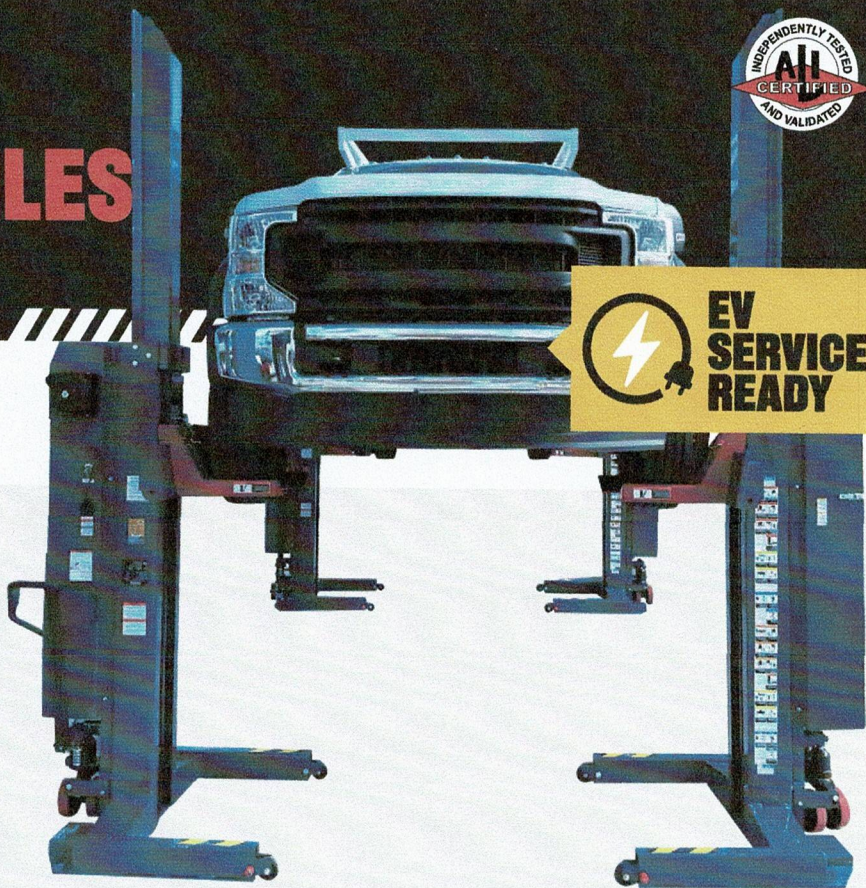
 **14' RECOMMENDED**

 **28' RECOMMENDED**

 **BATTERY**

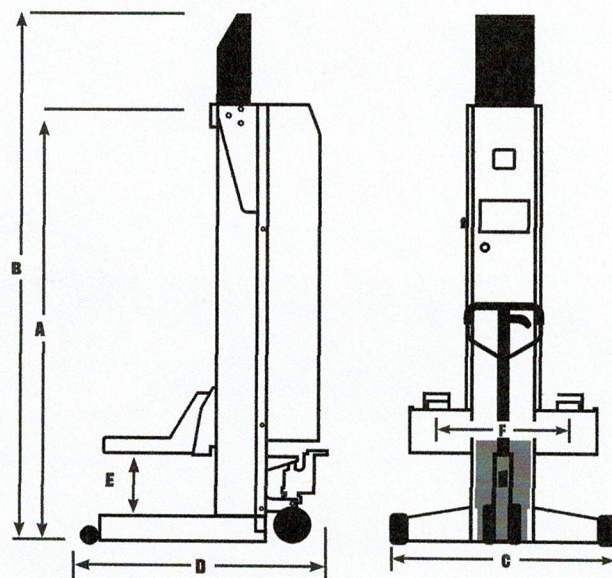
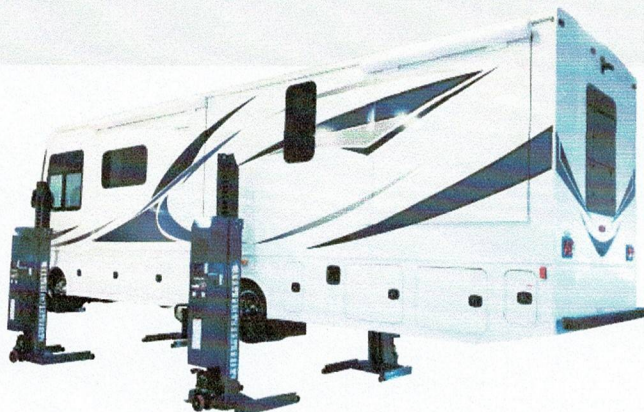
CONCRETE

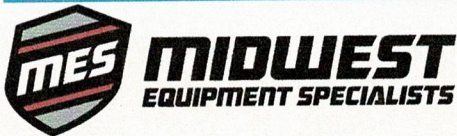
4" thick, reinforced, free from cracks/seams,
3500+ psi & cured 28+ days



SPECIFICATIONS

MODEL NUMBER	CLHM-140	CLHM-190	CLHM-190W
Description	Heavy-Duty	Heavy-Duty	Wide Heavy-Duty
Lifting Capacity	14,000 lbs.	19,000 lbs.	
Height of Lift Unit (A)	88½"		
Overall Height of Lift Unit at Full Rise (B)	157½"		
Width of Lift Unit (C)	44¼"		
Length of Lift Unit (D)	53⅝"		
Max. Lift Height 4+ Units (E)	69"		
Max. Lift Height (with 2 units)	32"		
Wheel Diameter (F)	Min. 5" - Max. 24½"		Min. 4" - Max. Determined by tire diameter
Max. Hydraulic System Operating Pressure	2,180 psi	2,600 psi	
Lift Speed (Max. Load)	60" per minute		
Weight of Lift Unit	1,485 lbs.	1,510 lbs.	1,575 lbs.
Footprint of Lift Unit	650 sq. in.		705 sq. in.
Ground Pressure for each Lift (Max. Load)	23.8 psi	31.6 psi	29.2 psi
Turning Radius of Lift Unit	47"		
Operating Peak Power	4HP		
Operating Voltage	24 VDC Nominal		26 VDC Nominal
Charger Voltage Required	120 VAC @ 60 Hz		122 VAC @ 60 Hz
Charger Amps Required	1.3 amps		2.3 Amps
ALI® Certified	☑		





Midwest Equipment Specialists
A Division of SLE Technologies, Inc.
4725 Farwell Street
608.838.8151
McFarland WI 53558

PROPOSAL

DATE	EXPIRATION	ESTIMATE #
8/22/2024	9/21/2024	105832
ORDERED BY	P.O. #	

BILL TO

Tom Williamson
Fort Atkinson DPW
600 Talcott Ave.
Fort Atkinson WI 53535 USA

SHIP TO

Don Knaack
Fort Atkinson DPW
600 Talcott Ave.
920-397-9909
Fort Atkinson WI 53535 USA

Scope of Work

New equipment, Supply multiple pieces of equipment to the new DPW facility.

ITEM	DESCRIPTION	QTY	RATE	AMOUNT
ST-1085-2FWA	Stertil Koni, Set of 6 - 111,000lbs capacity, 24 volts DC, control box on every column. Adj forks.	1.50	54,513.06	81,769.59
SKTJ-401	Stertil Koni, Heavy duty transmission jack, table 26"X16", 3,500lbs capacity, (38X52 Base), 74" lifting height, pneumatic operation.	1.00	9,039.09	9,039.09
18-9081A-03	Stertil Koni, Traverse Beam for vehicles with snow plow mounted (WEB-36-120ST)	1.00	5,804.43	5,804.43
JS-M8F	Stertil Koni support stand, Capacity 18,500 lbs, Medium, 7 locking positions, Range 33"-54" with fine adjustment, weight 95 lbs	4.00	1,048.45	4,193.78
JS-H8F	Stertil Koni support stand, Capacity 18,500 lbs, High, Fixed, 10 locking positions, Range 53"-83" with fine adjustment, weight 130 lbs	4.00	1,126.52	4,506.08
SKWD-500	Stertil Koni, High Lift Wheel Dolly (HLWD) with chain guard, 1,000lbs. Capacity, 52" lifting height, pneumatic operation.	1.00	8,218.33	8,218.33
38000920	Stertil Koni, Multi-Purpose Adapter ST1075/1085/1100, cap. to match column, (2 pieces), incl. two flat sliding adapters 32591051	1.00	6,513.52	6,513.52
837	AF&F FLOOR PRESS 50 TON	1.00	6,288.65	6,288.65
K19-26C	Kodiak floor scrubber K19-Series 26in Cylindrical, Traction.	1.00	7,990.94	7,990.94
K19-002	Kodiak, 175 AMP ON BOARD CHARGER	1.00	75.38	75.38
K19-016	Kodiak, Deluxe Fill: Front Retractable Hose & Removable Fill Screen	1.00	82.88	82.88
244055	Graco, Big Hauler truck drain	1.00	1,421.25	1,421.25



MIDWEST
EQUIPMENT SPECIALISTS

Midwest Equipment Specialists
A Division of SLE Technologies, Inc.
4725 Farwell Street
608.838.8151
McFarland WI 53558

PROPOSAL

DATE	EXPIRATION	ESTIMATE #
8/22/2024	9/21/2024	105832
ORDERED BY		P.O. #

Freight	Freight, ESTIMATE	1.00	2,950.00	2,950.00
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Column hoist

Higher Lift height

Serviceability By Midwest

Good reviews from other DPW's

Snow plow Adapter

Drive over

Jack Stands

Tube Steel Stronger design

More Adjustments for height

Full Roll design no tilt or Lifting

Transmission Jack

Higher weight Capacity

Fine Adjustments

Strap design - more Versatile / Easier to Setup to any transmission

Fuel cell etc.

SUBTOTAL
DISCOUNT

138,853.92

TOTAL USD

138,853.92

We impose a surcharge of 3.5% on the all transactions processed using a credit card. Please note this charge is for payment by credit/debit card only. You have the option to pay by check or cash without any additional fee.

Approved By _____

Date of Acceptance _____

steril[®]
KONI



MOBILE COLUMN LIFT

ST 1085 - ST 1100

Capacity 18,500 lbs.
or 22,000 lbs.



 **ebright**
SMART CONTROL SYSTEM

STERIL
SUPERIOR SOLUTIONS BY
QUALITY PEOPLE

Superior solutions by quality people



The Stertil Group provides customized and technically advanced lifting solutions for heavy-duty customers worldwide, as well as the best possible after-sales service from factory trained local partners. These superior solutions are conceived, developed and implemented by a team of specialized professionals with unique experience. Thanks to its quality people, its total in-house production process and its international organization, Stertil-Koni is the world leader in the field of heavy-duty vehicle lifting systems.

Wireless...

Our wireless mobile column lifts with the ebright Smart Control System represent the latest in mobile column lifting technology. Using the innovative ID key, you can connect up to 32 columns in a single lift set. In most cases, the special deep cycle batteries only need to be recharged every two weeks. No time is wasted connecting up cables and the mechanic has maximum access to the vehicle, without any tripping hazards.

Wireless mobile column lifts

with **ebright Smart Control System**



TOUCH SCREEN



WIRELESS



... or cabled, it's up to you

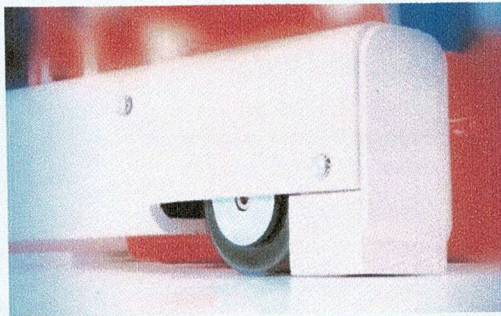
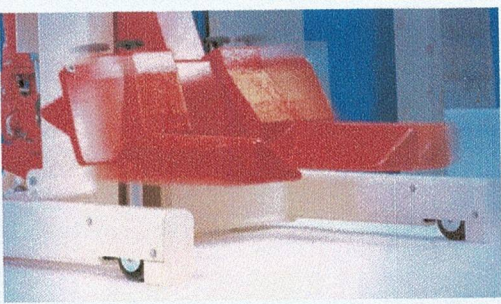
If you predominantly work in a fixed location the cabled mobile column lifts could be the best solution for you. This setup offers the possibility to connect up to 32 columns in a single lift set. All interconnection cables are equipped with heavy-duty plugs at both ends.

Both the wireless and the cabled column lifts are equipped with a control panel on each individual column. Columns can be operated individually, in pairs or simultaneously as a complete set with the touch of a button. Each column can therefore be used at any given location.

Full color touch screen control

The revolutionary **ebright Smart Control System** combines intuitive ease of use with maximum visual information about the lifting process. The main advantages:

- 7" full color touch screen, works even when wearing gloves
- User-configured options, such as choice of language, safety warnings and scheduled maintenance notifications
- All relevant information available at a glance
- Customizable ID-Key to prevent unauthorized operation
- Wireless Mesh network for optimal connectivity



Reliable hydraulic technology

- Extended column life and minimal maintenance thanks to low-friction design
- Stringent testing before leaving the factory
- Manual lowering in case of a power outage
- Maximum protection of the cylinder and seal against damage

Adjustable pick-up forks

ST 1085 mobile column lifts have a fork length of 14", ideal for picking up a variety of vehicles, including vehicles with super single tires in a safe and secure manner. The fork length for the ST 1100 mobile column lift is 12". Both models can handle wheels with rim diameters from R12 to R22.5 with an adjustable fork that is easy to move manually and includes a mechanical lock.

Retractable wheels

Both the wireless and the cabled mobile column lifts are available with retractable wheels. This unique Stertil-Koni design is the best available on the market. This prevents high point loading on the floor and reduces the floor surface pressure by a factor of 10. The system is fast, efficient, very stable and extremely reliable.

Adjustable lowering speed

If you need to lower the vehicle more slowly for precision placement of under carriage components, this is easily done with a single touch.



Power supply

The Stertil-Koni wireless mobile column lifts operate on 24 VDC and are easily recharged by means of a 110 VAC wall receptacle. The Stertil-Koni cabled mobile column lifts operate on three phase at 208/230, 460/480 and 575 VAC, as well as single phase at 220 VAC.

Fast lifting and lowering

The ST 1085 and ST 1100 only take 94 seconds to reach its maximum lifting height of 73". This makes them one of the fastest mobile column lifts in the world.

Well thought out in all aspects



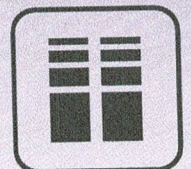
MAX 32 LINKED
COLUMNS



ADJUSTABLE
LOWERING SPEED



OVERLOAD
PROTECTION



UNIQUE
SYNCHRONIZATION
SYSTEM

Easy to move

Stertil-Koni mobile column lifts are indeed mobile, thanks to the synthetic roller wheels and hydraulic pallet jack mechanism with patented overload protection.

Safe working space

As an extra safety feature, we have also designed ample working space between the column and the vehicle. This ensures that the vehicle will not come into contact with the column in the event of sagging vehicle suspension.

Unique synchronization

The synchronization system is activated at a height difference of just 9/16". This ensures a safe and smooth lifting and lowering cycle, even in cases where the distribution of the vehicle weight is extremely uneven.

Lifetime guarantee

The innovative synthetic runner wheels within the column come with a lifetime parts guarantee.

Everything under control



Overview of ST 1085 – ST 1100 models	ebright wireless ST 1085-FWA ST 1100-FWA	ebright wireless ST 1085-RWA ST 1100-RWA	ebright cabled ST 1085-FSA ST 1100-FSA	ebright cabled ST 1085-RSA ST 1100-RSA
ebright Smart Control System with a control box on each individual mobile column	●	●	●	●
Touch screen with important information about the system e.g. lifting height, operation mode	●	●	●	●
Wireless Mesh network with continuous active channel search offering optimal connectivity	●	●		
These columns utilize a power outlet in the workshop and communicate with each other via interconnecting cables			●	●
Adjustable lowering speed for slow or normal lowering	●	●	●	●
Hydraulic pallet truck mechanism with patented overload protection	●	●	●	●
14"-long adjustable fork, suitable for super single tires	ST 1085	ST 1085	ST 1085	ST 1085
12"-long adjustable fork	ST 1100	ST 1100	ST 1100	ST 1100
Fixed synthetic wheels that reduce the floor surface pressure	●		●	
Retractable synthetic wheels integrated into the base frame, for 10x less floor pressure		●		●

K19 - Series Scrubbers

DUAL DISK		ORBITAL		CYLINDRICAL					
	26 in / 710 mm		28 in / 810 mm		24 in / 610 mm		28 in / 710 mm		26 in / 710 mm
Tank Material: Poly 5/16" (7.9mm)									
Chassis Construction: 3/16" Steel (4.8mm) Powder Coated Steel									
Front Wheels (Diameter x Width): (2x) 10" x 2.5" (25.4 x 6.4cm) - Black									
Rear Casters (Diameter x Width): (2x) 2.5" x 1.38" (6.4 x 3.5cm) - Black									
Length x Width x Height: 53 x 29 x 38.5 in *									
*Dimensions listed are for the largest width deck configuration and dimensions are based on the machine.									
Scrub Motor(s): 135 x 74 x 98 cm *									
0.75 hp / 559 watts									
270 rpm									
24 VDC									
175 ah WET									
System Voltage: Up to 3.5 Hours									
Standard Battery: 120VAC / 60 Hz Input - 24VDC / 12 amp Output									
Battery Run Time: 0.5hp - All Gear / Sealed (375 watts)									
Charger: 19 gal / 72 L									
Traction Drive System: 0 - 0.6 GPM / Stainless Inline (0 - 2.3 LPM)									
Solution Tank Capacity: 19 gal / 72 L									
Solution Flow / Filter: 0.8 hp / 36V / 3 Stage / 640 watts									
Recovery Tank Capacity: 70" / 178 cm / 70 cfm									
Vacuum Motor: 80 lbs									
Vacuum Water Lift: 41 in (104 cm)									
Squeegee: 80 lbs									
Downpressure: 37 in (94 cm)									
Squeegee: 72 dBA**									
Sound Levels:**									
25,979 ft2/hr									
2,414 m2/hr									
Productivity - Theoretical:***									
12,061 ft2/hr									
1,121 m2/hr									
Productivity - Practical:***									
25,979 ft2/hr									
2,414 m2/hr									
12,061 ft2/hr									
1,121 m2/hr									

*Minimum floor times are based on continuous cleaning in 10' x 10' area with 100% coverage and no obstacles.
 **Sound levels for this unit are 72 dBA at 10' distance.
 ***Productivity is based on 100% coverage and no obstacles.
 ****Productivity is based on 100% coverage and no obstacles.

Email: customerservice@kodiakquip.com
 Website: www.kodiakquip.com

Phone: 262-833-4025

Location:
 Kodiak Cleaning Equipment
 1711 South Street
 Racine, WI
 53404





AMERICAN FORGE & FOUNDRY, INC.™

50 TON SHOP PRESS

Model 837

American Forge & Foundry is pleased to introduce our new lineup of HEAVY DUTY Shop Presses. The heavier gauge steel make these presses ideal for heavy duty truck applications, spring shops, industrial, or every day shops that find themselves in need of a "step up" from a regular duty press.

- Heavy-Duty vehicle and industrial use
- Winch-operated press bed with seven adjustment levels
- Comes with 2 pressing plates
- Two-speed hand pump provides faster travel to load while air/hydraulic pump (with overload protection) provides effortless operation
- Frame-mounted hydraulic pressure gauge
- Shipping Weight: 672 lbs.

Ram Stroke: 7"
Space Interval: 5-1/2"
Bed Rail Opening: 9"
Post Opening: 32"
Base Width: 44"
Height: 68"



RELATED PRODUCTS



Model 522SD
22 Ton Super Duty Axle Jack



Model 545SD
30/15 Super Duty Axle Jack



Model 818SD
20 Ton Super Duty Collision Repair Kit

Guilderland Center, NY - 1-800-255-0555 - www.affjaxx.com



Typical Applications

- Truck maintenance facility
- Heavy-duty dealerships
- Fleet services facilities

Typical Fluids Handled

- Antifreeze
- Used oil

Technical Specifications

Fluid	Antifreeze / Oil
Fluid Capacity	26 gal (98.4 l)
Evacuation	Gravity
Receiver Material	Steel
Length	42 in (106.7 cm)
Width	30 in (76.2 cm)
Height	9 to 11 in (22.9 to 27.9 cm)
Instruction Manual	309194

Ordering Information

Part Number	Description
244055*	Big Hauler truck drain specially designed for truck maintenance facilities

*Use with evacuation kit 224873 or 24E166. 240832 can be ordered separately for existing diaphragm pump evacuation systems.

Track Receivers



Technical Specifications

Part Number	218969	235346
Fluid	Oil	Oil
Fluid Capacity	30 gal (113 l)	27 gal (102 l)
Evacuation	Gravity	Gravity
Receiver Material	Steel	Steel
Extension Range	37.5 to 46 in (0.95 to 1.17 m)	34.1 to 42.6 in (0.87 to 1.08 m)
Instruction Manual	307727	307727

Typical Applications

- Fast lube centers
- Fleet services facilities

Typical Fluids Handled

- Used oil

Ordering Information

Part Number	Description
218969	Specially designed for car and truck fast lube facilities where speed and mobility are important. Adjustable steel rollers fit track widths.
235346	Narrow rolling used-oil receiver, specially designed for car and truck fast lube facilities where speed and mobility are important. Adjustable steel rollers fit track widths. Same as 218969 except track width range.



Joseph Matenaer

414-491-7259

D20287@snapon.com

Tim Hofmann - 414-430-3322

Quote Date: 2/14/2024

Fort Atkins Garage

Discount Amount

Qty	Item	Description	Price	Preferred Cust	
1	EEWH331A	HD TILT BACK TIRE CHANGER	20,520.00	8,618.40	\$11,901.60
1	EAK0309J61A	PIN PLATE AND COLLET STAND	471.00	47.10	\$ 423.90
1	EEWB3-1B	CAR SUV LT TRUCK PIN PLATE SET	2,585.00	258.50	\$ 2,326.50
1	TJ100	1/2T MANUAL TRANS JACK	3,200.00	576.00	\$ 2,624.00
1	EEAC334B	POLARTEK DUAL AC MACHINE	22,605.00	5,882.49	\$ 16,722.51
1	ACT53134A	134A OIL/DYE INJECTOR	189.72	189.72	\$ 0
1	ACT53135	R1234YF REFILL DYE/OIL INJECTR	257.04	257.04	\$ 0
1	EEAC333-8	YF GAS ANALYZER FILTER	99.50	99.50	\$ 0
1	EEAC330-23B	FILTER DRYER	96.25	96.25	\$ 0
1	EEAC334CVR	AC MACHINE COVER	285.00	285.00	\$ 0
1	BK7000	HD B SCOPE W/5.5MM DUAL IMAGER	1,870.00	187.00	\$ 1,683.00
1	EETH310	DIAG THERMAL IMAGER ELITE	2,022.00	534.00	\$ 1,488.00
Total Quote: 54,200.51					\$37,169.51
Trade :		Down Payment			
Preferred Customer :		17,031.00	EC Rebate :		
Total Amount: 37,169.51					

This offer will expire **2/21/2024** Please don't hesitate to contact either myself or Joseph Matenaer with any further questions you may have.

Customer Signature : _____

Today's Total Savings w/ Trad 17,031.00

Franchisee Signature : _____

Total Quote is an estimate only and may not reflect actual final sales price.
*Excluding tax and applicable filing fees. Tax to be factored at final sale.

Add'l Info:

v1.54





MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Tom Williamson, Public Works Superintendent

RE: Review and possible action relating to a contract for Fiber Optic Cable and Splicing Installation Services from Koch Telecommunications at a cost not to exceed \$9,011.32 (Williamson, Superintendent Public Works)

BACKGROUND

The Public Works and Parks Operations Facility Project, approved for construction by the City Council in the spring of 2024, is well underway. Overall facility construction commenced in March 2024 and has now been slated for building completion in February 2025. The fast approaching completion date requires the extension of communication services to be completed by the City to facilitate the use of telephones and the internet.

DISCUSSION

In anticipation of the move in deadline, the Public Works Department contacted Koch Telecommunications, the installation contractor that performed the all city-owned fiber optic installation and splicing several years ago. Koch understands the City's fiber layout and current active/inactive lines thus the request for a sole source proposal. The work includes the installation of the required fiber optic cable, splicing, and switch cabinets. This will provide for uninterrupted and continued use of telephones, computers and wifi networks, maintaining operations throughout the process.

FINANCIAL ANALYSIS

Koch Telecommunications responded with the attached proposal for services in two parts. First, the installation and simultaneous connection of the new facility with continued use of the existing facility, with all necessary cabling, cabinets, and splicing, in the amount of \$7,961.32. The second portion of the proposal includes the removal of the slicing from the hand hole to the old facility office and permanent splicing for the new facility and West Shed, in the amount of \$1,050.00. Placing the total amount proposed for the work at \$9,011.32. This work requirement was planned in the F,F&E budget of \$545,000.00 process as part of network installation.

The table below shows the total budget for FFE, the amount spent to date, the amount and category of the current request, as well as the balance. As one can see from this table, if this

request is approved, the balance in the fixtures category will be \$75,988.68. The balances in the furnishings and equipment categories are \$126,846.60 and \$90,242.01, respectively. Staff continues to review the FFE needed to purchase for this project and anticipates returning to the City Council to authorize additional purchases in the future.

CATEGORY	BUDGET	SPENT TO DATE	THIS REQUEST	BALANCE
FURNISHINGS	\$ 210,000.00	\$ -	\$ 83,153.40	\$ 126,846.60
Desks, Tables, Chairs				
Racking and Storage				
Misc Storage				
Moving Expenses				
FIXTURES	\$ 85,000.00	\$ -	\$ 9,011.32	\$ 75,988.68
Appliances				
Audio Visual Equip				
Network Installation				
Instalation Expenses				
EQUIPMENT	\$ 250,000.00	\$ 17,620.87	\$ 142,137.12	\$ 90,242.01
Tire Changer				
Hydraulic Press				
Rolling Lifts				
Prod./Fab. Tools				
Floor Scrubber				
Brine Tank				
Pump Shed				
TOTALS	\$ 545,000.00	\$ 17,620.87	\$ 234,301.84	\$ 293,077.29

RECOMMENDATION

Staff recommends the council approve the contract with Koch Telecommunications Service, Inc. in an amount not to exceed \$9,011.32, using funds from the 2024 Public Works and Parks Operations Facility Project borrowing.

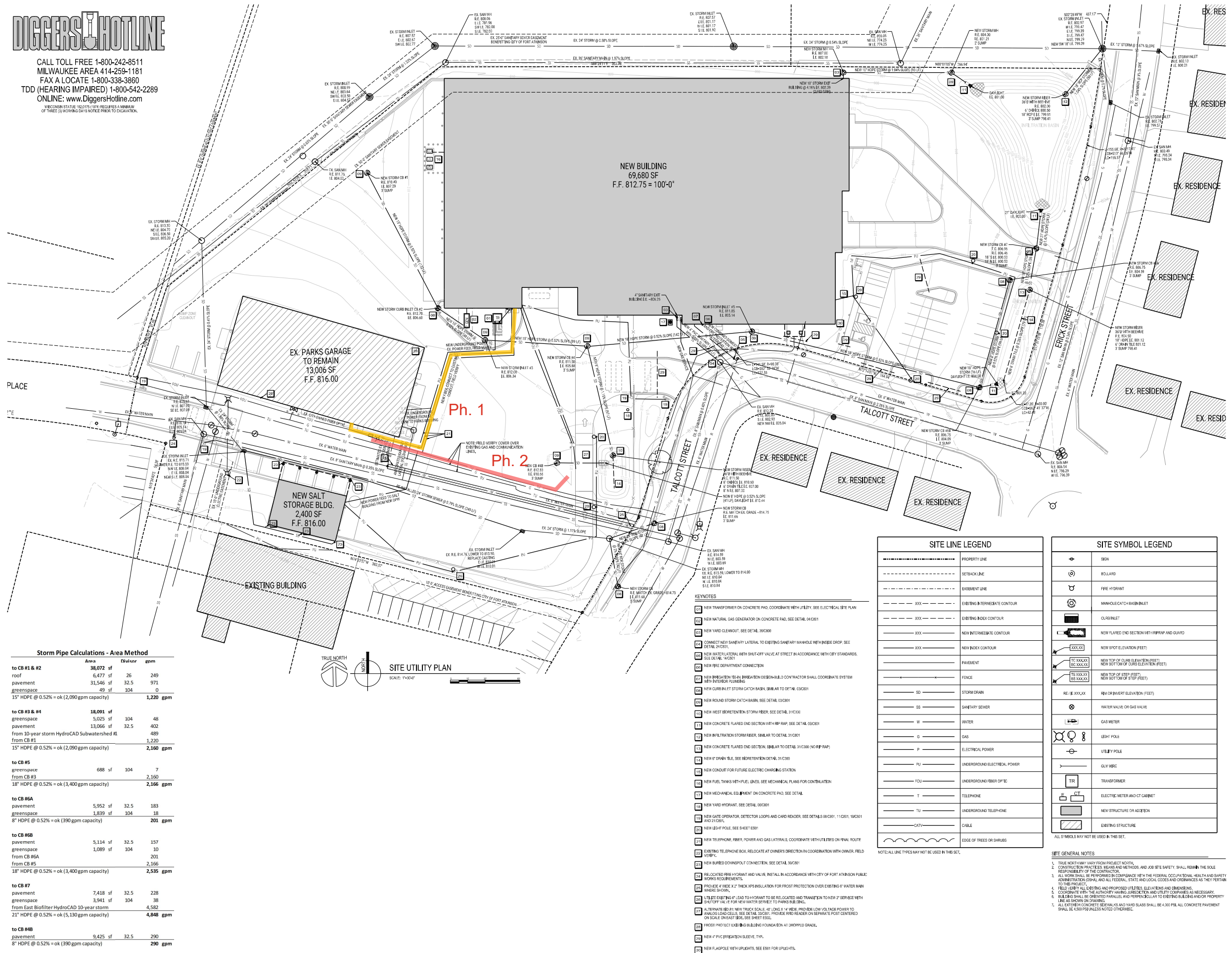
ATTACHMENTS

1. Fiber Optic Install Exhibit
2. Koch Proposal



CALL TOLL FREE 1-800-242-8511
MILWAUKEE AREA 414-259-1181
FAX A LOCATE 1-800-338-3860
DEAF (HEARING IMPAIRED) 1-800-542-2289
ONLINE: www.DiggersHotline.com

WISCONSIN STATUTE § 62.0715 (1974) REQUIRES A MINIMUM OF THREE (3) WORKING DAYS NOTICE PRIOR TO EXCAVATION.



KOCH'S TELECOMMUNICATIONS SERVICE, INC.

P.O. Box 365
419 W. Griffith Street
Hustisford, WI 53034

Office: 920-349-3839
Fax: 920-349-3092
Email: kts@kochstelecom.com

11/25/2024

Fort Atkinson DPW fiber installation.

ATTN: Tom Williamson

The following proposal is for installing fiber cable in the new DPW building and the Parks/West shed. New cable and tracer wire will be provided and placed in existing conduit from the hand hole to the new DPW building and the Parks/West shed. In the new DPW electric room where the fiber cable enters a 12U enclosed swing out data rack will be mounted on the wall. A 1U fiber panel will be installed and 12 fibers terminated. A jumper will be placed between two fiber pairs to route the fiber service back to the old DPW. In the Parks/West shed a 6U wall mount enclosed data rack will be installed. A fiber panel will be added and 12 fibers terminated. In the hand hole outside the Parks/West shed two fibers from the new DPW will be spliced to 2 fibers to the old DPW. This will reroute the service from the police station to the new DPW then back to the old DPW. Keeping the old DPW in service. From the new DPW 2 fibers will be spliced to the Parks/West shed. During a provided time frame the two fibers from the police station will be cut and spliced to the new DPW.

The total for the new construction proposal is \$7,961.32.

The total for disconnecting and removing the old DPW fiber is \$1,050.00.

The total for both proposals is \$9,011.32.

These proposals would be invoiced separately at time of completion.

Thank You for the opportunity to provide this proposal.

Josh Koch, Koch's Telecommunications Service Inc.

Approval signature / P.O. _____



MEMORANDUM

DATE: December 17, 2024

TO: Fort Atkinson City Council

FROM: Andy Selle, Director of Public Works

RE: Review and possible action authorizing an Environment and Planning Study to support the airport lighting and navigation upgrades from Mead and Hunt in an amount not to exceed \$20,000 (Selle, Director of Public Works)

BACKGROUND

Fort Atkinson has \$159,000 in Bipartisan Infrastructure Law (BIL) funding available to it from 2022. The availability of that funding expires at the end of this federal fiscal year, which means it must be obligated in a grant prior to September 30, 2025. Fort Atkinson's 61C Capital Improvement Plan (attached) shows the project to replace the airfields lighting, navigational aids, and signage.

The City Council approved the petition for airport aid at their meeting on December 20, 2022, and most recently reviewed the Airport CIP Plan within the 2025 budget approval, both of which include the above referenced project and authorize the federal Bureau of Aeronautics (BOA) to negotiate and contract on behalf of the City.

DISCUSSION

The new project delivery mechanism for FAA funded projects requires the Airport Owner (City of Fort Atkinson) to first perform and fund an Environmental and Planning Report on the proposed project to ensure the efficacy of the project. This approach appears wise for projects in congested airports or associated with expansion into new areas. Its application for replacing and upgrading existing lighting and navigation aids at the City's airport may be less critical, but the process must be followed.

The BOA and City staff have selected Mead and Hunt to develop the Environmental and Planning Report, and ultimately the project design, upon approval of the grant request to FAA. Given that the project is within our existing airport plan, there is little chance the project will not be approved. Discussions with Mead and Hunt indicate this document will not exceed \$20,000, but the full scope and budget for the effort will not be complete prior to the December 17, 2024 Council meeting.

The schedule for this project is below. As the Council may note, staff is running behind in

meeting the critical date of May 1, 2025 of the project for consideration.

Early November 2024 - Petition Submitted

Late November 2024 – Consultant Selection Completed

December 1, 2024 – Environmental and Planning Report Complete

March 15, 2025 – Scope and Fee Negotiated

March 28, 2025 – DT-30 Submitted for Approval to Apply for BIL Grant

May 1, 2025 – Submit Grant Application to FAA

FINANCIAL ANALYSIS

As noted above, staff is requesting Council authorize an expenditure not to exceed \$20,000, which will be reimbursed and/or deducted from the City's share of the design costs (estimated at \$6,600) and construction cost (estimated at \$38,000). The attached memorandum of understanding memorializes this plan for the future, given the departure of the Director of Public Works and Airport Manager Andy Selle. The actual cost will be provided for Council's information in a future packet.

The airport fund balance exceeds \$100,000, composed in part of several CARES act grants totaling \$75,000 provided during and following the pandemic. These funds have not been expended and are available to pay the expected project expenses.

RECOMMENDATION

Staff recommends Council authorize negotiation of a contract not to exceed \$20,000 by BOA staff with Mead and Hunt to develop an Environmental and Planning Document to support the airport lighting and navigation aids upgrade, using CARES act funds located within the Airport Fund fund balance. Note that the actual construction of the lights and navigation aids project will require additional authorization by the City Council in the future.

ATTACHMENTS

1. 12.20.22 Petition Resolution - signed
2. Environmental Document MOU
3. Pages from COFA 2025 Budget and 2025-2030 CIP

RESOLUTION NO. 1393
RESOLUTION PETITIONING THE
SECRETARY OF TRANSPORTATION
FOR AIRPORT IMPROVEMENT AID

WHEREAS, the City of Fort Atkinson, Jefferson County, Wisconsin hereinafter referred to as the sponsor, being a municipal body corporate of the State of Wisconsin, is authorized by Wis. Stat. §114.11, to acquire, establish, construct, own, control, lease, equip, improve, maintain, and operate an airport; and

WHEREAS, the sponsor desires to develop or improve the Fort Atkinson Municipal Airport, Jefferson County, Wisconsin,

"PETITION FOR AIRPORT PROJECT"

WHEREAS, the foregoing proposal for airport improvements has been referred to the city plan commission for its consideration and report prior to council action as required by Wis. Stat. §62.23(5), and

WHEREAS, airport users have been consulted in formulation of the improvements included in this resolution, and

WHEREAS, a public hearing was held prior to the adoption of this petition in accordance with Wis. Stat. §114.33(2) as amended, and a transcript of the hearing is transmitted with this petition, and

NOW THEREFORE, BE IT RESOLVED that the City Council of the City of Fort Atkinson does sponsor that a petition for federal and (or) state aid in the following form is hereby approved:

The petitioner, desiring to sponsor an airport development project with federal and state aid or state aid only, in accordance with the applicable state and federal laws, respectfully represents and states:

1. That the airport, which it is desired to develop, should generally conform to the requirements for a Local General Aviation type airport as defined by the Federal Aviation Administration.
2. The character, extent, and kind of improvements desired under the project are as follows: acquire snow removal equipment; **replace/upgrade airfield lighting including guidance signs**; conduct airport master plan and update airport layout plan; reconstruct/rehabilitate apron; reconstruct/rehabilitate taxiways/taxilanes; land acquisition for airport development; construct hangar; construct

terminal/FBO; replace rotating beacon; replace/upgrade apron and parking lot lighting; airfield drainage improvements; crack fill and seal coat airfield pavements; clear and maintain runway approaches as stated in Wis. Admin. Code Trans §55, and any necessary related work.

3. That the airport project, which your petitioner desires to sponsor, is necessary for the following reasons: to meet the existing and future needs of the airport.

WHEREAS, it is recognized that the improvements petitioned for as listed will be funded individually or collectively as funds are available, with specific project costs to be approved as work is authorized, the proportionate cost of the airport development projects described above which are to be paid by the sponsor to the Secretary of the Wisconsin Department of Transportation (hereinafter referred to as the Secretary) to be held in trust for the purposes of the project; any unneeded and unspent balance after the project is completed is to be returned to the sponsor by the Secretary; the sponsor will make available any additional monies that may be found necessary, upon request of the Secretary, to complete the project as described above; the Secretary shall have the right to suspend or discontinue the project at any time additional monies are found to be necessary by the Secretary, and the sponsor does not provide the same; in the event the sponsor unilaterally terminates the project, all reasonable federal and state expenditures related to the project shall be paid by the sponsor; and

WHEREAS, the sponsor is required by Wis. Stat. §114.32(5) to designate the Secretary as its agent to accept, receive, receipt for and disburse any funds granted by the United States under the Federal Airport and Airway Improvement Act, and is authorized by law to designate the Secretary as its agent for other purposes.

"DESIGNATION OF SECRETARY OF TRANSPORTATION AS SPONSOR'S AGENT"

THEREFORE, BE IT RESOLVED, by the sponsor that the Secretary is hereby designated as its agent and is requested to agree to act as such, in matters relating to the airport development project described above, and is hereby authorized as its agent to make all arrangements for the development and final acceptance of the completed project whether by contract, agreement, force account or otherwise; and particularly, to accept, receive, receipt for and disburse federal monies or other monies, either public or private, for the acquisition, construction, improvement, maintenance and operation of the airport; and, to acquire property or interests in property by purchase, gift, lease, or eminent domain under Wis. Stat. §32.02; and, to supervise the work of any engineer, appraiser, negotiator, contractor or other person employed by the Secretary; and, to execute any assurances or other documents required or requested by any agency of the federal government and to comply with all federal and state laws, rules, and regulations relating to airport development projects.

FURTHER, the sponsor requests that the Secretary provide, per Wis. Stat. §114.33(8)(a), that the sponsor may acquire certain parts of the required land or interests in land that the Secretary shall find necessary to complete the aforesaid project.

"AIRPORT OWNER ASSURANCES"

AND BE IT FURTHER RESOLVED, that the sponsor agrees to maintain and operate the airport in accordance with certain conditions established in Wis. Admin. Code Trans §55, or in accordance with sponsor assurances enumerated in a federal grant agreement.

AND BE IT FURTHER RESOLVED THAT THE City Clerk and Council President be authorized to sign and execute the agency agreement and federal block grant owner assurances authorized by this resolution.

CERTIFICATION

I, Michelle Ebbert, Clerk of the City of Fort Atkinson, Wisconsin, do hereby certify that the foregoing is a correct copy of a resolution introduced at a regular meeting of the Fort Atkinson City Council on December 20, 2022, adopted by a majority vote, and recorded in the minutes of said meeting.



Christopher Scherer, Council President

ATTEST:



Michelle Ebbert, City Clerk/Treasurer/Finance Director



December 13, 2024

Re: Memorandum of understanding for reimbursement of Environmental and Planning Document for Airport Electrical Upgrades between BOA and City of Fort Atkinson

Fort Atkinson has \$159,000 in Bipartisan Infrastructure Law (BIL) funding available to it from 2022. That funding's availability expires this federal fiscal year, which means it must be obligated in a grant prior to September 30, 2025. Fort Atkinson's (61C) Capital Improvement Plan (attached) shows a planned start of a project to replace the airfields lighting, navigational aids, and signage.

Our understanding is that the federal approach to design of these projects NOW requires the Airport Owner to front the cost of the Environmental and Planning Document BEFORE any federal funds can be spent on the project. An RFP process has selected Mead and Hunt as the preferred design consultant. Discussions with them have indicated the Environmental and Planning Document will not exceed \$20,000.

The City Council has approved the petition for airport aid at their meeting on December 20, 2022 and most recently reviewed the Airport CIP Plan within the 2025 budget approval both of which include the above referenced project and authorize BOA to negotiate and contract on behalf of the City.

Federal and State Funding will reimburse the City for the expenses involved in performing the Environmental and Planning Document upon its completion. The expected amount is not to exceed \$20,000 and will be confirmed by contract negotiations with Mead and Hunt, performed by BOA on behalf of the City of Fort Atkinson. An estimated \$6,600, the final amount to be determined after scoping and negotiation of the design contract, of the design costs for this project will ultimately be the responsibility of the City of Fort Atkinson. An estimated \$38,000 of the construction costs will be the responsibility of the City of Fort Atkinson, the actual amount to be determined following receipt of construction bids. These expected costs on the project can be reduced by the City's expense on for Environmental and Planning Document.

This document jointly developed by Andy Selle (City of Fort Atkinson) and Colin Davidson (Bureau of Aeronautics) 12.13.24.

ACIP 2024-2029 Fort Atkinson Municipal

LOCAL GA		FFY2024															
LOC ID	Airport	P	C	T	Rating	Flag	Project Description	Year	Entitlement	BIL	Apportionment	Discretionary	Total AIP	State Match	Local Match	Total Cost	Notes
Conduct Airport Master Plan																	
61C	Fort Atkinson Municipal	PL	MA	NP	69		Conduct Airport Master Plan - Phase 2 (Master Plan & Exhibit A)	2024 (2022)	\$200,000		\$117,000		\$317,000	\$1,889	\$1,889	\$320,778	Phase 1 was Aerial Survey. Phase 3 is ALP.
PROJECT SUBTOTALS									\$200,000	\$0	\$117,000	\$0	\$317,000	\$1,889	\$1,889	\$320,778	
2023 Statewide SRE Program																	
61C	Fort Atkinson Municipal	ST	EQ	SN	75		Acquire Snow Removal Equipment (Pick up Truck with Plow)	2024 (2023)	\$108,000		\$0		\$108,000	\$6,000	\$6,000	\$120,000	Planning to use 2023 ENT
PROJECT SUBTOTALS									\$108,000	\$0	\$0	\$0	\$108,000	\$6,000	\$6,000	\$120,000	
Replace Airfield Electrical																	
61C	Fort Atkinson Municipal	RE	RW	LI	79		Rehabilitate Runway 3/21 Lighting - Phase 1 (Design)	2024 (2023)		\$45,000			\$45,000	\$2,500	\$2,500	\$50,000	
61C	Fort Atkinson Municipal	ST	TW	LI	68		Construct Taxiway A1 Lighting - Phase 1 (Design)	2024		\$9,000			\$9,000	\$500	\$500	\$10,000	
61C	Fort Atkinson Municipal	ST	TW	LI	68		Construct Taxiway A2 Lighting - Phase 1 (Design)	2024		\$9,000			\$9,000	\$500	\$500	\$10,000	
61C	Fort Atkinson Municipal	RC	EQ	VI	78		Reconstruct Airport Beacon - Phase 1 (Design)	2024 (2023)		\$7,200			\$7,200	\$400	\$400	\$8,000	
61C	Fort Atkinson Municipal	ST	RW	VI	73		Install Runway Vertical/Visual Guidance System (Runway 3/21 PAPIs and REILs) - Phase 1 (Design)	2024 (2023)		\$18,000			\$18,000	\$1,000	\$1,000	\$20,000	ENT/BIL Only.
61C	Fort Atkinson Municipal	ST	EQ	VU	70		Construct Airport Lighting Vault - Phase 1 (Design)	2024 (2023)		\$18,000			\$18,000	\$1,000	\$1,000	\$20,000	
61C	Fort Atkinson Municipal	ST	OT	SG	42		Install Airfield Guidance Signs (Runway 3/21 and Connector Taxiways) - Phase 1 (Design)	2024		\$5,400			\$5,400	\$300	\$300	\$6,000	
61C	Fort Atkinson Municipal	ST	OT	IN	40		Install Miscellaneous NAVAIDs (Wind Cone & Segment Circle) - Phase 1 (Design)	2024		\$7,200			\$7,200	\$400	\$400	\$8,000	
PROJECT SUBTOTALS									\$0	\$118,800	\$0	\$0	\$118,800	\$6,600	\$6,600	\$132,000	
FFY TOTALS									\$308,000	\$118,800	\$117,000	\$0	\$543,800	\$14,489	\$14,489	\$572,778	

Expected share of design expense for City of Fort Atkinson

FFY2025																		
LOC ID	Airport	P	C	T	Rating	Flag	Project Description	Year	Entitlement	BIL	Apportionment	Discretionary	Total AIP	State Match	Local Match	Total Cost	Notes	
61C	Fort Atkinson Municipal						No Project	2025					\$0	\$0	\$0	\$0		
FFY TOTALS										\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	

FFY2026																	
LOC ID	Airport	P	C	T	Rating	Flag	Project Description	Year	Entitlement	BIL	Apportionment	Discretionary	Total AIP	State Match	Local Match	Total Cost	Notes
Conduct Airport Master Plan																	
61C	Fort Atkinson Municipal	PL	MA	NP	69		Conduct Airport Master Plan - Phase 3 (ALP UDate)	2026	\$90,000				\$90,000	\$5,000	\$5,000	\$100,000	
PROJECT SUBTOTALS									\$90,000	\$0	\$0	\$0	\$90,000	\$5,000	\$5,000	\$100,000	
Replace Airfield Electrical																	
61C	Fort Atkinson Municipal	RE	RW	LI	79		Rehabilitate Runway 3/21 Lighting - Phase 2 (Construction)	2026 (2024)	\$270,000				\$270,000	\$15,000	\$15,000	\$300,000	
61C	Fort Atkinson Municipal	ST	TW	LI	68		Construct Taxiway A1 Lighting - Phase 2 (Construction)	2026		\$45,000			\$45,000	\$2,500	\$2,500	\$50,000	
61C	Fort Atkinson Municipal	ST	TW	LI	68		Construct Taxiway A2 Lighting - Phase 2 (Construction)	2026		\$54,000			\$54,000	\$3,000	\$3,000	\$60,000	
61C	Fort Atkinson Municipal	RC	EQ	VI	78		Reconstruct Airport Beacon - Phase 2 (Construction)	2026 (2024)	\$45,000				\$45,000	\$2,500	\$2,500	\$50,000	

61C	Fort Atkinson Municipal	ST	RW	VI	73		Install Runway Vertical/Visual Guidance System (Runway 3/21 PAPIs and REILs) - Phase 2 (Construction)	2026 (2024)		\$90,000			\$90,000	\$5,000	\$5,000	\$100,000	ENT/BIL Only.
61C	Fort Atkinson Municipal	ST	EQ	VU	70		Construct Airport Lighting Vault - Phase 2 (Construction)	2026 (2024)	\$45,000	\$90,000			\$135,000	\$7,500	\$7,500	\$150,000	
61C	Fort Atkinson Municipal	ST	OT	SG	42		Install Airfield Guidance Signs (Runway 3/21 and Connector Taxiways) - Phase 2 (Construction)	2026		\$18,000			\$18,000	\$1,000	\$1,000	\$20,000	
61C	Fort Atkinson Municipal	ST	OT	IN	40		Install Miscellaneous NAVAIDs (Wind Cone & Segment Circle) - Phase 2 (Construction)	2026		\$27,000			\$27,000	\$1,500	\$1,500	\$30,000	
PROJECT SUBTOTALS									\$360,000	\$324,000	\$0	\$0	\$684,000	\$38,000	\$38,000	\$760,000	
FFY TOTALS									\$450,000	\$324,000	\$0	\$0	\$774,000	\$43,000	\$43,000	\$860,000	

Expected share of construction expense for City of Fort Atkinson

FFY2027																	
LOC ID	Airport	P	C	T	Rating	Flag	Project Description	Year	Entitlement	BIL	Apportionment	Discretionary	Total AIP	State Match	Local Match	Total Cost	Notes
Land Acquisition																	
61C	Fort Atkinson Municipal	ST	LA	DV	60		Acquire Land for Development - Phase 1 (Consutlant Services)	2027						\$80,000	\$20,000	\$100,000	Placeholder. Showing State Aid to start.
PROJECT SUBTOTALS									\$0	\$0	\$0	\$0	\$0	\$80,000	\$20,000	\$100,000	
Land Acquisition																	
61C	Fort Atkinson Municipal	ST	TE	CO	41		Construct Terminal Building - Phase 1 (Design)	2027 (2025)		\$180,000			\$180,000	\$10,000	\$10,000	\$200,000	
PROJECT SUBTOTALS									\$0	\$180,000	\$0	\$0	\$180,000	\$10,000	\$10,000	\$200,000	
FFY TOTALS									\$0	\$180,000	\$0	\$0	\$180,000	\$90,000	\$30,000	\$300,000	

FFY2028																	
LOC ID	Airport	P	C	T	Rating	Flag	Project Description	Year	Entitlement	BIL	Apportionment	Discretionary	Total AIP	State Match	Local Match	Total Cost	Notes
Land Acquisition																	
61C	Fort Atkinson Municipal	ST	LA	DV	60		Acquire Land for Development - Phase 2 (Acquisition)	2028						\$200,000	\$50,000	\$250,000	Placeholder. Showing State Aid to start.
PROJECT SUBTOTALS									\$0	\$0	\$0	\$0	\$0	\$200,000	\$50,000	\$250,000	
FFY TOTALS									\$0	\$0	\$0	\$0	\$0	\$200,000	\$50,000	\$250,000	

FFY2029																	
LOC ID	Airport	P	C	T	Rating	Flag	Project Description	Year	Entitlement	BIL	Apportionment	Discretionary	Total AIP	State Match	Local Match	Total Cost	Notes
Land Acquisition																	
61C	Fort Atkinson Municipal	ST	TE	CO	41		Construct Terminal Building - Phase 2 (Construction)	2029 (2026)	\$450,000	\$172,000			\$622,000	\$34,556	\$34,556	\$691,111	
PROJECT SUBTOTALS									\$450,000	\$172,000	\$0	\$0	\$622,000	\$34,556	\$34,556	\$691,111	
FFY TOTALS									\$450,000	\$172,000	\$0	\$0	\$622,000	\$34,556	\$34,556	\$691,111	

- LEGEND
- Discretionary
 - Entitlement Only
 - Apportionment
 - BIL
 - State Aid
 - Sponsor Only
 - FAA Owned Facility
 - Funding TBD

SECTION R - 2025 CAPITAL IMPROVEMENTS PROJECT BUDGET

City of Fort Atkinson
2025 Capital Improvements Projects Budget
Expenditure Detail

PROJECT LINE ITEM		2025 REQUEST	2025 PROPOSED LEVY FUNDED	2024-2025 BORROWING	2025 PROPOSED TRANSPORT FUNDING	OTHER FUNDING SOURCE (SEE TABLE)	PUSHED TO FUTURE CIP	PROJECT DESCRIPTION
DEPARTMENT	PROJECT							
2025 CAPITAL IMPROVEMENTS PROJECT BUDGET								
ALL - GENERAL FUND	COMPUTER/SERVER REPLACEMENT	\$ 15,600.00	\$ 15,600.00	\$ -	\$ -	\$ -	\$ -	Annual computer and server replacement removed from individual CIPs and placed here for all depts.
AIRPORT	AIRPORT MASTER PLAN	\$ 1,889.00	\$ -	\$ -	\$ -	\$ 1,889.00	\$ -	Master Plan for the Airport due to be complete in 2025. City's portion (3% or less) paid for through CARES Act Funds. Total cost \$350,000.
AIRPORT	MOWING EQUIPMENT	\$ 9,000.00	\$ -	\$ -	\$ -	\$ 9,000.00	\$ -	Mowing equipment for the Airport (large deck); could be utilized for other areas. City's portion (50%) paid for through CARES Act Funds. Total estimated cost \$18,000.
AIRPORT	SNOW REMOVAL EQUIPMENT	\$ 6,000.00	\$ -	\$ -	\$ -	\$ 6,000.00	\$ -	Placeholder for snow removal equipment. Vehicle bid out in 2024 with no bids received. May be bid out again in 2025. City's portion (3% or less) paid for through CARES Act Funds. Total cost \$225,000.
AIRPORT	RUNWAY/TAXIWAY LIGHTING	\$ 5,900.00	\$ -	\$ -	\$ -	\$ 5,900.00	\$ -	Runway and taxiway lighting elements to be replaced and upgraded. City's portion in 2025 and 2026 to be paid for through CARES Act Funds.
AIRPORT	NAVAIDS/BEACON PROJECT	\$ 700.00	\$ -	\$ -	\$ -	\$ 700.00	\$ -	Navigation Aids and rotating beacon elements to be replaced and updated in 2025 and 2026. To be paid for through CARES Act funds.
AQUATIC CENTER	MECHANICAL REPAIRS & SHOWER REPLACEMENT	\$ 32,000.00	\$ -	\$ 32,000.00	\$ -	\$ -	\$ -	Replace a total of four 34-year old showers, replace water heaters, repair 34 year old mechanisms, hot water mixer.
CITY MANAGER	CLASSIFICATION AND COMPENSATION STUDY	\$ 30,000.00	\$ -	\$ -	\$ -	\$ 30,000.00	\$ -	RFP to be issued in 2025 for classification and compensation study, likely resulting in a recommendation for changes to the City's pay plan, employee classifications, and compensation. Proposed ARPA use.
ELECTRICAL	MCCAIN TRAFFIC CONTROLLERS	\$ 10,000.00	\$ 10,000.00	\$ -	\$ -	\$ -	\$ -	Upgrade to new traffic controllers; annual cost of upgrades until all complete
ELECTRICAL	CROSSWALK LEDS	\$ 19,650.00	\$ 19,650.00					Replace incandescent with LED. 42 throughout the City at signalized intersections.
ELECTRICAL	MAIN STREET COBRA HEAD LIGHTS	\$ 9,500.00	\$ 9,500.00	\$ -	\$ -		\$ -	Replace aging light fixtures with LED. \$200/fixture, change the head on the poles to LED.
ENGINEERING	ANNUAL STREETS PROGRAM	\$ 920,700.00	\$ -	\$ 208,700.00	\$ 712,000.00	\$ -	\$ -	Various roads that include the spun-cast main within the City. Asphalt is repaved and C&G replaced, sidewalk is added or in-filled when the budget allows. 2025 work to include Memorial Dr, McMillan St, Erick St, and portion of N 4th St.; Fund 5 2024 YE fund balance applied to projects