



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, MAY 6, 2025 – 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**
- 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 April 15, 2025 City Council meeting** (Ebbert, Clerk/Treasurer/Finance Director)
 - b. Review and possible action relating to **Council Appointments to Boards,**

Commissions and Committees (Jaeckel, Council President)

- c. Review and possible action relating to **Citizen Appointments** to Boards, Commissions and Committees (Houseman, City Manager)
- d. Review and possible action on a **Special Event: Fort Youth Baseball Opening Weekend Invite**, Saturday, May 17, 2025, from 6 a.m. to 8 p.m. and Sunday, May 18, 2025, from 12 to 8 p.m.

6. Petitions, Requests, and Communications

- a. Recognition of **Greg and Anna Albert** as winners of the Historic Preservation Commission's 2025 Historic Preservation Award (Lee, Museum Director)
- b. Review and possible action on a proclamation recognizing **EMS Week May 18-24, 2025 and International Firefighters Day May 4, 2025** in the City of Fort Atkinson (Houseman, City Manager)
- c. Review and possible action relating to a Proclamation **Recognizing the 56th Annual Professional Municipal Clerks Week** (Houseman, City Manager)
- d. Review and possible action relating to a Proclamation **Recognizing National Police Week, May 11-17, 2025 and Peace Officers' Memorial Day, May 15, 2025** (Houseman, City Manager)
- e. Review and possible action relating to the proclamation declaring the month of **May as Building Safety Month** in the City of Fort Atkinson (Houseman, City Manager)
- f. Recognition of 2024-25 City Council President Davin Lescohier (Houseman, City Manager)

7. Resolutions and Ordinances

8. Reports of Officers, Boards, and Committees

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

9. Unfinished Business

10. New Business

- a. Review and possible action relating to a proposal for a **Retail Market Study** from Growth Services Group (Houseman, City Manager)
- b. Review and possible action relating to a **Contract with Artisan Graham** for the sale of the City-owned lots in the Maple Grove Subdivision (Houseman, City Manager)
- c. Review and possible action relating to proposals for a **Classification and Compensation Study** for the City of Fort Atkinson (Houseman, City Manager)
- d. Review and possible action relating to **2025 CIP Bathhouse Shower**

Improvement at the Rock River Park Aquatic Center (Dayton, Parks and Recreation Director)

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: May 2, 2025

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

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**CITY COUNCIL MEETING
IN PERSON AND VIA ZOOM
TUESDAY, APRIL 15, 2025 – 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, Cm. Jaeckel, Cm. Johnson, Cm. Schultz and President Lescohier. Also present: City Manager, City Clerk/Treasurer/Finance Director, Public Works Superintendent, City Attorney, Fire Chief, Museum Director, Police Chief, Park & Recreation Director and Public Works Supervisor.

3. Public Hearings

None.

4. Public Comment

John Hausz, 104 Jefferson Street - spoke on unmowed area and sump pump drainage.

5. Consent Agenda

Jaeckel moved, seconded by Johnson to approve the Consent Agenda as presented. Motion carried.

- a. *Review and possible action relating to the **minutes of the April 2, 2025 Police and Fire Commission meeting** (Ebbert, Clerk/Treasurer/Finance Director)*
- b. *Review and possible action relating to the **minutes of the April 3, 2025 City Council meeting** (Ebbert, Clerk/Treasurer/Finance Director)*
- c. *Review and possible action relating to the **minutes of the April 8, 2025 Plan Commission meeting** (Ebbert, Clerk/Treasurer/Finance Director)*
- d. *Review and possible action relating to **building, plumbing, and electrical permit report for March 2025** (Draeger, Building Inspector/Zoning Administrator)*
- e. *Review and possible action relating to the City Clerk-issued **License and Permit Report for March 2025** (Ebbert, Clerk/Treasurer/Finance Director)*
- f. *Review and possible action relating to **City Sewer, Water, and Stormwater Utility Financial Statements as of March 31, 2025** (Ebbert, Clerk/Treasurer/Finance Director)*

- g. *Review and Possible action on a **Special Event: Wings & Wheels Fly-In Breakfast**, Sunday, June 1, 2025, 6 a.m.-2 p.m. at Fort Atkinson Municipal Airport (Ebbert, Clerk/Treasurer/Finance Director)*

6. Petitions, Requests, and Communications

- a. *Review and possible action relating to a proclamation honoring **Mason Becker** for ten years of dedicated service to the City of Fort Atkinson (Houseman, City Manager)*
Schultz moved, seconded by Johnson to approve the proclamation recognizing Mason Becker for ten years of dedicated service to the City of Fort Atkinson. Motion carried.
- b. *Review and possible action relating to proclamation recognizing **Fort Atkinson as the Intersectional Peony City of Wisconsin** (Lee, Museum Director)*
Johnson moved, seconded by Jaeckel to approve the proclamation recognizing Fort Atkinson as the Intersectional Peony City of Wisconsin. Motion carried.
- c. *Review and possible action to proclaim **April 25, 2025, as Arbor Day** in the City of Fort Atkinson (Williamson, Superintendent of Public Works)*
Schultz moved, seconded by Jaeckel to proclaim April 25, 2025 as Arbor Day in the City of Fort Atkinson. Motion carried.
- d. *Review and possible action relating to a Proclamation **Recognizing Municipal Treasurers Week** April 20-26, 2025 (Houseman, City Manager)*
Becker moved, seconded by Johnson to approve the proclamation recognizing Municipal Treasurers Week April 20-26, 2025 in the City of Fort Atkinson. Motion carried.
- e. *Jefferson County GIS Consortium Presentation from Laura Scott*
No action required.
- f. *ATV/UTV Ordinance Six-month Review per Section 95-160 of the Municipal Code (Bump, Police Chief)*
No action required.

7. Resolutions and Ordinances

None.

8. Reports of Officers, Boards, and Committees

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

9. Unfinished Business

None.

10. 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)*
Becker moved, seconded by Johnson to approve the list of Verified Claims as presented.
Motion carried.

11. Adjournment

- a. ***The 2024-2025 City Council will adjourn – Sine Die***
Jaeckel moved, seconded by Becker to adjourn the final meeting of the 2024-2025 Fort Atkinson City Council Sine Die. Motion carried.

12. Oath of Office

- a. *The City Clerk will administer the **Oath of Office** to newly elected City Council Members (Ebbert, Clerk/Treasurer/Finance Director)*
No action required.

13. Call meeting to order

- a. ***Call to order** the first meeting of the 2025-2026 Fort Atkinson City Council (Houseman, City Manager)*
Manager Houseman called the meeting to order at 7:54 pm.
- b. ***Roll Call** (Houseman, City Manager)*
Present: Cm. Huckabee, Cm. Jaeckel, Cm. Johnson, Cm. Schultz and Cm. Lescohier.
- c. ***Election of the President of the City Council for the term of April 15, 2025 – April 21, 2026** (Houseman, City Manager)*
Bruce Johnson moved to nominate Kyle Jaeckel to the position of City Council President for the 2025-2026 year. Peggy Huckabee seconded the nomination. Kyle Jaeckel accepted the nomination.

President Jaeckel took the seat as Council President.

- d. ***Election of the President Pro Tem of the City Council for the term of April 15, 2025-April 21, 2026** (Council President)*
Davin Lescohier nominated Eric Schultz to the position of President Pro Tem for the 2025-2026 year. Bruce Johnson seconded the nomination. Eric Schultz accepted the nomination.
- e. *Review and possible confirmation of the City Manager's appointment of Eric Schultz to serve as the Council Representative on the **Plan Commission** (Houseman, City Manager)*
Lescohier moved, seconded by Johnson to confirm the appointment of Eric Schultz to serve as the Council Representative on the Plan Commission for the 2025-2026 year.
Motion carried.
- f. *Review and possible action to designate the **Daily Jefferson County Union as the Official***

City Newspaper for purposes of publishing required legal notices (Ebbert, Clerk/Treasurer/Finance Director)

Schultz moved, seconded by Lescohier to designate the Daily Jefferson County Union as the Official City Newspaper for purposes of publishing required legal notices. Motion carried.

14. New Business

a. *Review and possible action relating to the **purchase of a Walk Behind Pavement Saw** for the Public Works Operations Division (Williamson, Public Works Superintendent)*

Superintendent Williamson discussed the final 2025 General Fund and Capital Improvement Projects funding budgets were approved by the City Council in November 2024 at the regular meeting on November 19th. The 2025 Department of Public Works Capital Improvement Projects budget included the purchase of several pieces of equipment to replace older and some worn-out items. Those items include a Ford F250 service truck with a rear lift gate (previously approved by City Council and ordered), a walk behind pavement saw, a scag zero turn mower, a pavement crack router, and a wing plow attachment with installation. The F250 is not part of the purchase requests before the Council tonight. The four remaining items up for approval are included in tonight's packet and will be presented in the following order: 1 - Walk Behind Pavement Saw, 2 - Scag Zero Turn Mower, 3 - Pavement Crack Router, and 4 - Wing Plow Attachment for a single-axle plow truck (Fleet No. 4). The walk-behind pavement saw is proposed to replace the existing unit that has served the City well for more than 26 years. The average useful life of this type of equipment, per industry standard and the Wisconsin DOT, is typically 6 to 8 years. Staff reached out to several providers of this type of equipment in an effort to research the best unit for the City's operations.

Schultz moved, seconded by Huckabee to approve the purchase of a walk behind pavement saw for Public Works Operations at a cost not to exceed \$11,166. Motion carried.

b. *Review and possible action relating to the **purchase of a Scag Turf Tiger Zero Turn Mower with Hurricane Mulching Kit and Fiberglass Shade Top Kit** for the Public Works Operations Division (Williamson, Public Works Superintendent)*

Superintendent Williamson stated the Public Works Operations Division proposes to purchase a scag zero turn mower to replace the existing unit that has served the City for the last 5 years. The average useful life of this type of equipment, per industry standards and the Wisconsin DOT, is typically 5 years. Staff reached out to the City's preferred local provider, Mid-state Equipment, and received favorable cost proposal of \$14,799.00, including the mulching kit. Staff also sourced a canopy shade top online at a price of \$752.96 delivered by Thunderbird Industries. These items total \$15,551.96. Staff reviewed the low bidder, spoke with our local representative, and recommends making the purchase from Mid-state Equipment.

Lescohier moved, seconded by Johnson to approve the purchase of a scag zero turn mower with hurricane mulch kit and canopy shade cover from Mid-state Equipment and Thunderbird Industries at a cost not to exceed \$15,551.96. Motion carried.

- c. *Review and possible action relating to the **purchase of a Crafcro Model 30 Pavement Crack Router with Dust Control Kit** for the Public Works Operations Division (Williamson, Public Works Superintendent)*

Superintendent Williamson reviewed the request to purchase a Crafcro Model 30 Pavement Router with Dust Control Kit to replace the existing unit that has served the City for the last 28 years. The average useful life of this type of equipment, per industry standards and the Wisconsin DOT, is typically 6 to 8 years. Staff reached out to two providers, Sherwin Industries of Milwaukee, WI and Midstates Equipment of Mountain Lake, MN. Sherwin Industries provided a proposal for \$22,250.00, and Midstates Equipment provided a proposal for \$24,025.00.

Schultz moved, seconded by Huckabee to approve the purchase of a Crafcro model 30 pavement crack router with dust control kit for Public Works Operations Division from Sherwin Industries at a cost not to exceed \$22,250. Motion carried.

- d. *Review and possible action relating to the **purchase of a Wing Plow System and Installation onto a Single Axle Plow Truck (Fleet No. 4)** for the Public Works Operations Division (Williamson, Public Works Superintendent)*

Superintendent Williamson noted that this request seeks approval to purchase a Wing Plow Attachment to add to one of the fleet plow trucks that was ordered years ago without one. The average useful life of this type of equipment (pursuant to industry standards and the Wisconsin DOT) is typically 15 years. The Department reached out to the original upfitter of Fleet Truck No. 4 for a proposal to add a wing plow attachment. Monroe responded with a proposal of \$26,761.00 for all parts and labor.

Johnson moved, seconded by Schultz to approve the purchase of a wing plow system and installation onto a single axle plow truck (Fleet No. 4) for the Public Works Operations Division at a cost not to exceed \$26,761. Motion carried.

15. Adjournment

Schultz moved, seconded by Johnson to adjourn. Meeting adjourned at 8:18 pm.

Respectfully submitted
Michelle Ebbert
City Clerk/Treasurer/Finance Director

Committee Assignments

COMMITTEE (CHAIRPERSON)	CURRENT 2024-2025	NEW ASSIGNMENT 2025-2026
Plan Commission (City Manager)	Eric Schultz	Eric Schultz
Airport Committee (City Manager)	Bruce Johnson	Bruce Johnson
Ambulance Advisory Committee (Council President)	Davin Lescohier	Peggy Huckabee
Board of Zoning Appeals (Elected by Membership)	Bruce Johnson Mason Becker	Bruce Johnson Peggy Huckabee
Cable Television Committee (Council Rep)	Eric Schultz	Eric Schultz
Economic Development Commission (Elected By Membership)	Bruce Johnson	Peggy Huckabee
Finance Committee (Council President)	Davin Lescohier Mason Becker Eric Schultz	Kyle Jaeckel Davin Lescohier Peggy Huckabee
Historical Society Board (Elected By Membership)	Kyle Jaeckel	Bruce Johnson
Library Board (Elected By Membership)	Davin Lescohier	Davin Lescohier
License Committee (Council President)	Davin Lescohier Eric Schultz Kyle Jaeckel	Kyle Jaeckel Davin Lescohier Eric Schultz
Ordinance Committee (Council President)	Davin Lescohier Bruce Johnson Mason Becker	Kyle Jaeckel Bruce Johnson Peggy Huckabee
Parks & Recreation Board (Elected By Membership)	Kyle Jaeckel	Kyle Jaeckel

Public Works Committee (Council President)	Davin Lescohier Mason Becker Kyle Jaeckel	Kyle Jaeckel Bruce Johnson Eric Schultz
Sex Offender Residence Board (City Manager)	Eric Schultz	Eric Schultz
Tourism Commission (Elected By Membership)	Mason Becker	Davin Lescohier
Transportation & Traffic Review Committee (City Engineer)	Kyle Jaeckel	Kyle Jaeckel



MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to Citizen Appointments to Boards, Commissions and Committees (Houseman, City Manager)

BACKGROUND

The City has a wide variety of Committees, Commissions, and Boards made up of citizens, staff, and elected officials. Some of these groups are outlined in the City's Ordinances. Most often, the City Manager is responsible for appointing citizen members, subject to approval by the City Council. Similarly, in most cases, the Council President is responsible for appointing Council members to these groups.

DISCUSSION

The following citizen members are eligible for appointment or reappointment to the Committees, Commissions, and Boards below for the terms indicated:

Economic Development Commission

- Jonah Ralston for a three year term ending in 2028

Library Board

- Julie Olver for a three year term ending in 2028
- Sara Scullin for a three year term ending in 2028
- Laura Becker for a three year term ending in 2028

Plan Commission

- Diana Shull for a three year term ending in 2028
- John Ciccarelli for a three year term ending in 2028

Tourism Commission

- Mary Jo Eggers for a one year term ending in 2026
- Sarah Schultz for a one year term ending in 2026
- Julie Nordeen for a one year term ending in 2026
- Mariah Hadler for a one year term ending in 2026

Board of Zoning Appeals

- Jim Woodman for a two year term ending in 2027
- Paul Brady for a two year term ending in 2027
- Jordan Lamb for a two year term ending in 2027

Note the following vacancies for citizens on City Commissions, Committees, and Boards:

- Airport Committee (one seat)
- Board of Zoning Appeals (two seats)
- Cable Television Committee (one seat)
- Economic Development Commission (one seat)

Staff continues to work on filling these vacancies and encourages members of the public to submit an [application](#) to serve if interested.

FINANCIAL ANALYSIS

The appointments of citizens to these Committees, Commissions, and Boards is not expected to impact the City financially.

RECOMMENDATION

Staff recommends that the City Council confirm the appointments listed in this memo through the Consent Agenda.

ATTACHMENTS

None



MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action on a Special Event: Fort Youth Baseball Opening Weekend Invite, Saturday, May 17, 2025, from 6 a.m. to 8 p.m. and Sunday, May 18, 2025, from 12 to 8 p.m.

BACKGROUND

The City of Fort Atkinson is committed to supporting quality special events throughout the community. The Special Event Guide and Application was created to assist with planning events in the city and to allow appropriate contact information be obtained and forwarded to Departments. The planning guide is designed to assist members of the community in the planning, preparation and running of events and programs in Fort Atkinson.

The Special Event Guide defines a special event as a planned extraordinary occurrence or temporary aggregation of attractions, open to the public, that (a) is conducted on public property, (b) is conducted on private property and has a substantial impact on public property, (c) has activities that request special temporary licenses; or (d) require special city services, whether open to the public or not, including but not limited to, any of the following: street closures, provisions of barricades, garbage cans, stages or special no parking signs, special electrical services, or special police protection. Special events include, but not limited to, neighborhood and community festivals, parades, processions, fairs, and bicycle or foot races.

DISCUSSION

Event: Fort Youth Baseball Opening Weekend Invite

Dates and Hours of Event:

Saturday May 17, 2025 from 6:00 am – 8:00 pm

Sunday May 18, 2025– 12:00 pm to 8:00 pm

Location: Memorial Park, East Street

Contact Person: Paul Broadhead, fortyouthbaseball@gmail.com

Estimated Number of Attendees: 500

Event information was routed to Departments without any concerns provided.

FINANCIAL ANALYSIS

There is no financial impact to the City of Fort Atkinson for the event.

RECOMMENDATION

Staff recommends that City Council approve the Fort Youth Baseball Opening Weekend Invite on May 18-19, 2025 at Memorial Park.

ATTACHMENTS

1. FORT YOUTH BASEBALL SPEC EVENT 5.17-5.18.25
2. Memorial Park



CITY OF FORT ATKINSON
Special Event Application
Fee: \$25.00

Name of Business/Group Organizing Event: **Fort Youth Baseball**

Contact Person for Event: **Paul Broadhead**

Phone Number:

Email: **fortyouthbaseball@gmail.com**

Day of Event Contact Person (if different from above):

Phone: **(608) 287-8745**

Email:

Special Event Details

Event Name: **Fort Youth Baseball Opening Weekend Inv/te**

Event Date (mm/dd/yyyy): **May 17-18, 2025**

Event Location: **Memorial Park**

Estimated Number of Attendees: **500 per day**

Hours of Event: **May 17, 8AM-8PM; May 18, Noon-7:00PM**

Event Setup Time: **Friday, May 16, 5:00PM - 8:00PM**

Event Tear Down Time: **Sunday, May 18 -- Out by 9:00PM**

Event Description: The 73rd Annual Opening Weekend for Fort Youth Baseball will operate similar to prior years. This is a two-day event on May 17-18 and serves as a kickoff to the regular baseball season. There will be 17 teams from Fort Atkinson and approximately 12-16 teams from neighboring communities. Each team plays two games over the course of the two days, this is not a tournament, just a chance for teams to play early games before league play begins. Fort Youth Baseball does not charge fees to participating teams or their fans.

Goal/Purpose of Event: Provide an opportunity for youth to play baseball games and promote baseball connections between nearby communities..

Attach a map of the event including:

Designated parking areas and available number of spaces*, directional signage for events (i.e. parking guidance), pedestrian street crossing locations, location of any traffic control barricades or personnel to ensure safe coordination of vehicles and pedestrians

** If limited parking available, provide proof of permission from neighboring businesses/property to utilize their parking*

Check all applicable boxes:

☐ I am renting a city park

Attach copy of paid park rental from Parks & Recreation Department. Equipment rentals are reservable through the Parks & Recreation office 920-397-9910. You are responsible for picking up, setting up, tearing down, and return of equipment. Each park is equipped with picnic tables and garbage/recycling receptacles, and additional are available upon request. If additional cans are requested, the event coordinator will need to pick up additional can liners from Park & Recreation office. The event coordinator is responsible for trash and recycling disposal. If there is no dumpster on site, a dumpster may be required and is the responsibility of the event coordinator.

☒ I am renting city equipment

Please secure and submit payment for requested equipment prior to submitting Special Event Application.
*Attach a map with a location for drop off of equipment with this application.

8' white plastic table (43 available; \$4.50/each)

Qty ____

Metal folding chair (190 available; \$0.75/each)

Qty ____

Additional Picnic Table (\$15/each; Includes delivery & pick up)*

Qty 10

Additional Garbage/Recycling Can*

Qty ____

Barricades*

Qty ____

Traffic Cones*

Qty ____

☐ Electrical Access

The City Electrician may reach out to you to address any needs/concerns.

Please specify if you have any requests or requirements beyond current access:

Continued

☐ I will be having music (Per City Ordinance 17.03) no person shall cause or allow loud, excessive or unusual noise that will disturb the comfort and quiet repose of persons in the vicinity. All music shall terminate as of 10:00 p.m. City noise ordinance must be followed

Start Time of Music: _____ End Time of Music: _____

☐ I will be closing a street(s)* Barricades can be provided by Public Works upon request
* Provide proof of permission from neighboring businesses/properties if street closure impacts daily activity

☐ I will be selling beer and/or wine* Alcohol license and licensed bartender(s) required. Contact City Clerk (920) 397-9901 prior to submitting this application.

*Restroom Plan also required with sales of beer and/or wine. Refer to the Special Event Guide.

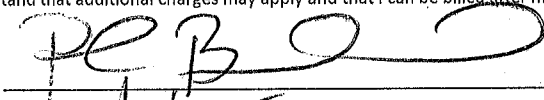
☐ I will be erecting a tent, canopy or other temporary structure.*
*Event coordinator is responsible for ensuring that the temporary structure is safely installed. Event Coordinator is required to contact Diggers Hotline at least 4 business days prior to the event. Diggershotline.com, 1-800-242-8511

☐ I am having a walk/race*
*See map instructions above. In addition to the previously listed map requirements, clearly mark your walk/race route on the map.

By signing, I agree to the following statements:

I understand I am responsible for a fire safety and medical plan. I understand it is my responsibility to read the Special Events Guide. I understand I may be required to provide Proof of Insurance. I understand that I may need to contact multiple Departments to arrange for assistance. I understand I am responsible for timely clean up after the event. I understand that additional charges may apply and that I can be billed after my event.

Responsible Party Signature:


5/1/25

Submission Date:

For Office Use Only:

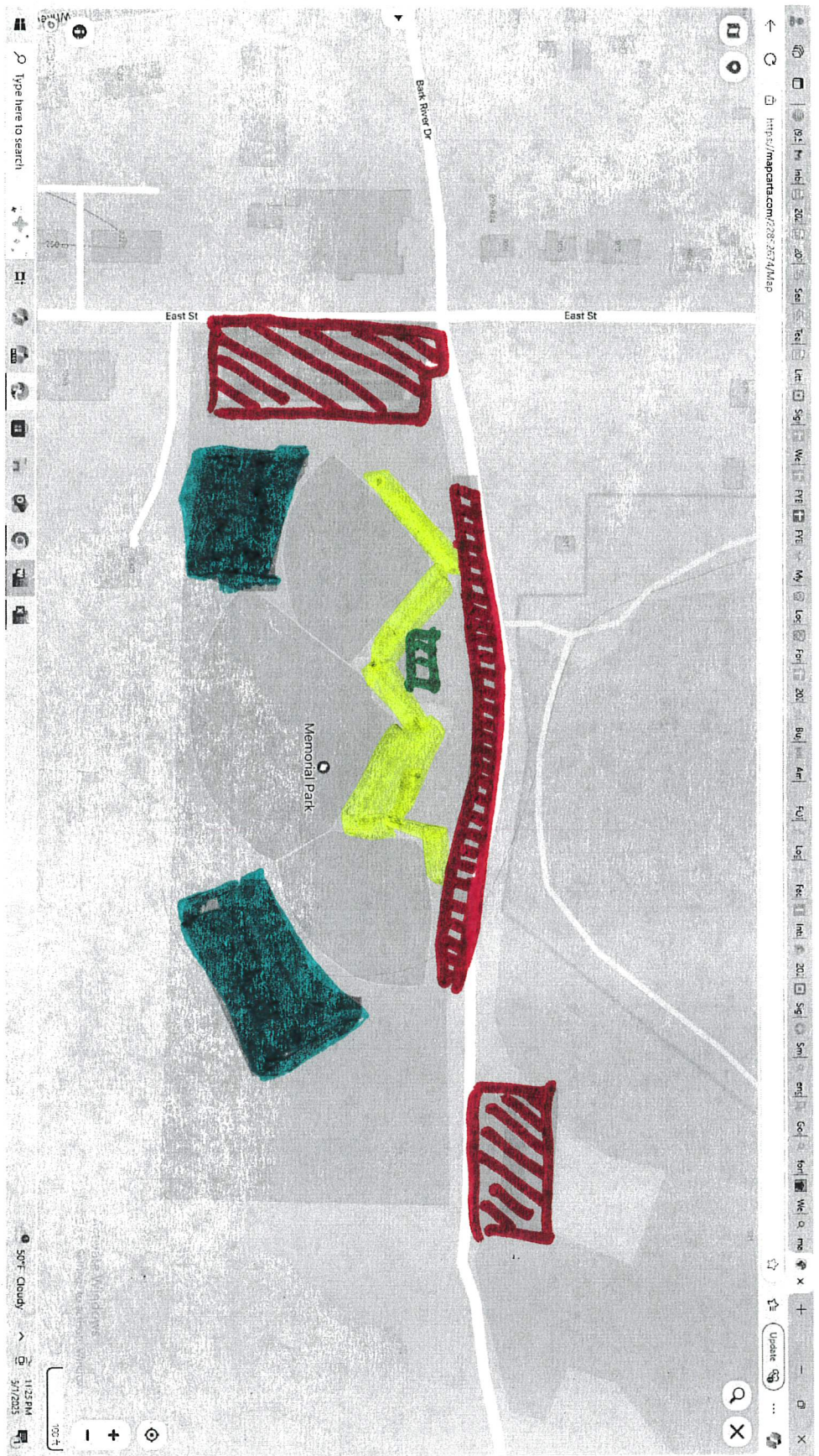
Date Received: _____

Date Paid: _____

Council Approval / Denial Date: _____

Date applicant notified of Council action and any event stipulations: _____

Event Stipulations:



-  Parking Areas
-  Food & Restrooms
-  Seating Areas
-  Baseball Warm-up Areas

Fort Youth Baseball Opening Weekend Invite 2025 Site Map





MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Merrilee Lee, Museum Director

RE: Recognition of Greg and Anna Albert as winners of the Historic Preservation Commission's 2025 Historic Preservation Award (Lee, Museum Director)

BACKGROUND

The City of Fort Atkinson's Historic Preservation Commission consists of five members who value the historic preservation of buildings, both residential and commercial. The commission provides assistance with historic building projects. The commission also strives to encourage residents to appreciate the value and importance of historic structures in the community.

DISCUSSION

The Historic Preservation Commission created the Historic Preservation Award in order to recognize residents or building owners in the City of Fort Atkinson who have completed historic restoration/preservation projects that preserve the rich history of Fort Atkinson found in its historic architecture. These projects, both large and small, have added value to their neighborhood and community by preserving the unique design and character of historically designated properties. For the inaugural award, the Historic Preservation recognizes the work of Anna and Greg Albert, owners of the Marston-Hoard House at 323 Merchants Avenue in Fort Atkinson. In the past years, the Albert family has restored and protected the house's substantial wrap-around front porch, thus preserving the porch and maintaining the house's historic character.

FINANCIAL ANALYSIS

The expense of the plaque is covered by the budgeted funds allotted to the Historic Preservation Commission.

RECOMMENDATION

The City of Fort Atkinson's Historic Preservation Commission has awarded Anna and Greg Albert the inaugural Historic Preservation award for their efforts to preserve the Marston-Hoard House. No action by the City Council is necessary.

ATTACHMENTS

None



MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action on a proclamation recognizing EMS Week May 18-24, 2025 and International Firefighters Day May 4, 2025 in the City of Fort Atkinson (Houseman, City Manager)

BACKGROUND

May 18-24, 2025 marks the 51st year of National EMS Week. It's a time to show gratitude to EMTs and paramedics who provide lifesaving care across the nation every day. International Firefighters Day is celebrated on May 4, 2025.

DISCUSSION

The City of Fort Atkinson is lucky to have a full-time fire and EMS department located at the Fort Atkinson Fire Department and values the important service first responders provide. At a moment's notice, fire and EMS members are quick to respond to uncertain situations to mitigate danger and combat the threat of destructive fire to protect individuals, families, and the economic being of our community.

EMS Week celebrates the paramedics, EMTs and other EMS professionals who work diligently to care for their patients and serve their communities in times of crisis.

International Firefighters' Day is observed each year on May 4th to honor and remember past firefighters who have lost their lives while serving their communities, to express gratitude to those who have served in this line of work, and to show support and appreciation for those who presently serve.

FINANCIAL ANALYSIS

This proclamation is not expected to financially impact the City.

RECOMMENDATION

Staff recommends the City Council approve the proclamation recognizing EMS Week and International Firefighters Day.

ATTACHMENTS

1. Proclamation EMS Week and International Firefighters Day 2025

**PROCLAMATION
RECOGNIZING NATIONAL EMS WEEK
MAY 18-24, 2025 AND
INTERNATIONAL FIREFIGHTERS DAY MAY 4, 2025**

WHEREAS, emergency medical services is a vital public service; and

WHEREAS, the members of emergency medical services teams are ready to provide lifesaving care to those in need 24 hours a day, seven days a week; and

WHEREAS, access to quality emergency care dramatically improves the survival and recovery rate of those who experience sudden illness or injury; and,

WHEREAS, the emergency medical services system consists of first responders, emergency medical technicians, paramedics, emergency medical dispatchers, firefighters, police officers, educators, administrators, pre-hospital nurses, emergency nurses, emergency physicians, trained members of the public, and other out of hospital medical care providers; and

WHEREAS, the members of emergency medical services teams, whether career or volunteer, engage in thousands of hours of specialized training and continuing education to enhance their lifesaving skills; and

WHEREAS, it is appropriate to recognize the value and the accomplishments of emergency medical services providers by designating the Emergency Medical Services Week in the City of Fort Atkinson; and

NOW, THEREFORE, I, Kyle Jaeckel, as City Council President of the City of Fort Atkinson, do here by recognize the week of May 18 through 24, 2025, to be EMS Week in the City of Fort Atkinson, in honor of the men and women whose diligence and professionalism keep our city and citizens safe.

FURTHERMORE, the City of Fort Atkinson City Council hereby proclaims and calls upon all citizens of the City of Fort Atkinson to recognize May 4, 2025 as International Firefighters Day in honor of those firefighters who, dedicate their lives to the protection of life and property and have volunteered countless hours over many years.

Proclaimed this 6th day of May, 2025.

CITY OF FORT ATKINSON

Kyle Jaeckel, Council President

ATTEST:

Michelle Ebbert, City Clerk/Treasurer/Finance Director



MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to a Proclamation Recognizing the 56th Annual Professional Municipal Clerks Week (Houseman, City Manager)

BACKGROUND

The 56th Professional Municipal Clerks Week will be celebrated May 4-10, 2025. It was initiated in 1969 by the International Institute of Municipal Clerks (IIMC) and is endorsed by all of its members throughout the United States, Canada, and 15 other countries.

DISCUSSION

It is important to recognize the contributions of our staff. The City's Municipal Clerk provides the professional link between the citizens, the local governing bodies, and agencies of government at other levels. The staff in the Clerk's office have pledged to be ever mindful of their neutrality and impartiality, rendering equal service to all residents through transparency and accountable government practices. They continually strive to improve through participation in education programs, seminars, workshops, and annually conferences across Wisconsin.

FINANCIAL ANALYSIS

This proclamation is not expected to impact the City financially

RECOMMENDATION

Staff recommends the Council approve the proclamation recognizing the 56th annual Professional Municipal Clerks Week and recognize the City's Professional Municipal Clerk, Michelle Ebbert, and her staff: Deputy Clerk Courtney Thom, Utility Billing Specialist Kara Mroz and Deputy Treasurer Lance Lembitz.

ATTACHMENTS

1. Proclamation Municipal Clerks Week 2025

PROCLAMATION
RECOGNIZING THE 56th ANNUAL PROFESSIONAL MUNICIPAL CLERKS WEEK

WHEREAS, the office of the Professional Municipal Clerk, a time honored and vital part of local government, exists throughout the world as the oldest profession among public servants; and

WHEREAS, the Municipal Clerk provides the professional link between the citizens, the local governing bodies, and agencies of government at other levels; and,

WHEREAS, Municipal Clerks have pledged to be ever mindful of their neutrality and impartiality, rendering equal service to all residents through transparency and accountable government practices; and

WHEREAS, Professional Municipal Clerks continually strive to improve the administration of the affairs of the Office of the Professional Municipal Clerk through participation in education programs, seminars, workshops and the annual meetings of their state, provincial, county and international professional organizations; and

WHEREAS, It is most appropriate that we recognize the accomplishments of the Office of the Professional Municipal Clerk; and

NOW, THEREFORE, I, Kyle Jaeckel, City Council President of the City of Fort Atkinson, do here by recognize May 4 through May 10, 2025 as Professional Municipal Clerks Week, and further extend appreciation to our Professional Municipal Clerk, Michelle Ebbert, her staff: Deputy Clerk Courtney Thom, Utility Billing Specialist Kara Mroz and Deputy Treasurer Lance Lembitz, and to all Professional Municipal Clerks for the vital services they perform and their exemplary dedication to the communities they represent.

Proclaimed this 6th day of May, 2025

CITY OF FORT ATKINSON

Kyle Jaeckel, Council President

ATTEST:

Michelle Ebbert, City Clerk/Treasurer/Finance Director



MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to a Proclamation Recognizing National Police Week, May 11-17, 2025 and Peace Officers' Memorial Day, May 15, 2025 (Houseman, City Manager)

BACKGROUND

In 1962, President John F. Kennedy signed a proclamation that designated May 15 as Peace Officers Memorial Day and the week in which that date falls as Police Week. This year, Police Week is May 11-17, 2025.

DISCUSSION

The City of Fort Atkinson commends the Police Officers who serve the City and keep citizens safe. Police Week is a time to recognize the great service law enforcement professionals provide to the community and honor those who have made the ultimate sacrifice to serve and protect.

FINANCIAL ANALYSIS

This proclamation is not expected to have a financial impact on the City.

RECOMMENDATION

Staff recommends the Council approve the proclamation recognizing Police Week and Peace Officers' Memorial Day.

ATTACHMENTS

1. Proclamation National Police Week 2025

**PROCLAMATION
RECOGNIZING NATIONAL POLICE WEEK
MAY 11-17, 2025 AND
PEACE OFFICERS' MEMORIAL DAY**

WHEREAS, National Police Week in America was created to honor and recognize the sacrifice and contributions made by police officers in communities both large and small; and

WHEREAS, National Police Week, held every year in May, was created in 1962 through a proclamation issued by then-President John F. Kennedy; and

WHEREAS, our community will always appreciate and commend the risks police officers take every day to ensure our community's laws are properly enforced and that public safety is ensured; and,

WHEREAS, now more than ever, the community also appreciates and encourages the community involvement facilitated by our police officers to both better serve and instill mutual trust, camaraderie and positive relationships among our diverse population in the City of Fort Atkinson; and

WHEREAS, police engage with and serve the public in the most varied and wide-ranging manner, and their efforts do not go unnoticed; and

WHEREAS, the men and women of the City of Fort Atkinson Police Department provide vital public service; and

NOW, THEREFORE, I, Kyle Jaeckel, as City Council President of the City of Fort Atkinson, do here by recognize the week of May 11 through 17, 2025, to be Police Week in the City of Fort Atkinson, in honor of the men and women whose diligence and professionalism keep our city and citizens safe.

FURTHERMORE, the City of Fort Atkinson City Council hereby proclaims and calls upon all citizens of the City of Fort Atkinson to recognize May 15, 2025 as Peace Officers' Memorial Day in honor of those law enforcement officers who, through their courageous deeds, have made the ultimate sacrifice in service to the communities they served.

Proclaimed this 6th day of May, 2025.

CITY OF FORT ATKINSON

Kyle Jaeckel, Council President

ATTEST:

Michelle Ebbert, City Clerk/Treasurer/Finance Director



MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to the proclamation declaring the month of May as Building Safety Month in the City of Fort Atkinson (Houseman, City Manager)

BACKGROUND

Building Safety Month is an international campaign in May to raise awareness about building safety. This campaign reinforces the need for modern, regularly-updated building codes, and helps individuals, families and businesses understand what it takes to create safe and sustainable structures.

DISCUSSION

The City of Fort Atkinson has a proactive Building Inspector and Zoning Administrator, Jedidiah Draeger, who helped to update the City's Zoning Code last year and enforces the code every day. The City appreciates Jed's important work to make the City of Fort Atkinson a safe place to live, work and visit.

FINANCIAL ANALYSIS

This proclamation is not expected to impact the City financially.

RECOMMENDATION

Staff recommends the council approve the proclamation recognizing May as Building Safety Month in the City of Fort Atkinson.

ATTACHMENTS

1. 2025 Proclamation Building Safety Month

**PROCLAMATION
RECOGNIZING BUILDING SAFETY MONTH**

WHEREAS, the City of Fort Atkinson is committed to recognizing our growth and strength depends on the safety and essential role our homes, buildings and infrastructure play, both in everyday life and when disasters strike; and

WHEREAS, our confidence in the resilience of these buildings that make up our community is achieved through the devotion of vigilant guardians—building safety and fire prevention officials, architects, engineers, builders, tradespeople, design professionals, laborers, plumbers and others in the construction industry—who work year-round to ensure the safe construction of buildings; and

WHEREAS, these guardians are dedicated members of the International Code Council, a non-profit that brings together local, state, territorial, tribal and federal officials who are experts in the built environment to create and implement the highest-quality codes to protect us in the buildings where we live, learn, work and play; and,

WHEREAS, Building Safety Month is sponsored by the International Code Council to remind the public about the critical role of our communities' largely unknown protectors of public safety—our local code officials—who assure us of safe, sustainable and affordable buildings that are essential to our prosperity; and

WHEREAS, each year, in observance of Building Safety Month, people all over the world are asked to consider the commitment to improve building safety, resilience and economic investment at home and in the community, and to acknowledge the essential service provided to all of us by local and state building department, fire prevention bureaus and federal agencies in protecting lives and property; and

NOW, THEREFORE, I, Kyle Jaeckel, as City Council President of the City of Fort Atkinson, and my Council colleagues, do hereby proclaim May 2025, as Building Safety Month.

Proclaimed this 6th day of May 2025

CITY OF FORT ATKINSON

Kyle Jaeckel, Council President

ATTEST:

Michelle Ebbert, City Clerk/Treasurer/Finance Director



MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to a proposal for a Retail Market Study from Growth Services Group (Houseman, City Manager)

BACKGROUND

City staff continues to pursue development opportunities in all areas (commercial, residential, industrial) to support the tax base as well as quality of life for Fort Atkinson's residents and visitors. Over the past two years, the City's Plan Commission has approved two retail projects that were not constructed: a Dollar Tree store to be located along Madison Avenue, and a Dollar General Market to be located in an outlot along Janesville Avenue. Both companies submitted site and building plans that met the City's general codes and zoning ordinances, and the Plan Commission approved both projects. However, neither project was constructed. Both companies provided reasons why the development was not pursued; however, there continues to be a gap in retail services in the Fort Atkinson area.

DISCUSSION

In discussions with the City's partners at ThriveED/JCEDC, staff was provided the names of a few companies that provide retail market studies for communities to determine actual gaps and then pursue development which may fill those gaps. Staff reviewed the companies' websites and found that Growth Services Group (GSG) seemed to have the best experience providing market studies based on survey data in rural communities. Staff reached out to the company for an introductory discussion. After learning more about the services and methodology used by GSG, staff requested a proposal to conduct a retail market survey.

The proposal is attached for review. Because the City has not done business with the company in the past, staff reviewed all references provided. All municipalities that used these services recommended GSG and would use them again.

FINANCIAL ANALYSIS

The cost of the proposed retail market study is \$12,500 plus travel expenses. Per Corey Mehaffy, Growth Services Group, travel expenses include hotel, meals, and mileage for three of his team members for three days, and is estimated at \$4,000. The total cost of this project is estimated at \$16,500.

Staff proposes to use funds from the Lodging/CityScape/Room tax fund (Fund 8) to pay for these services. There is a substantial fund balance in Fund 8, which is where the City's 30% of the room tax funds are located. As of the end of 2024, there was a positive fund balance of \$138,317 in Fund 8. Note that this is the same fund the City used to support the Boost Fort Atkinson: Business Pitch Competition. This study was not included in the 2025 budget; however, staff believes it will be very useful in identifying gaps in current retail uses in the City and support staff's continued efforts to attract retail establishments.

RECOMMENDATION

Staff recommends that the City Council authorize the City Manager to execute an agreement for services with Growth Services Group at a cost not to exceed \$16,500 to be funded through Fund 8.

ATTACHMENTS

1. Fort Atkinson WI Retail Study
2. SAMPLE Moberly Retail Study _wAppendices
3. SAMPLE Retail lots flyer 2015-v6



Statement of Qualifications & Professional Services Proposal for: **City of Fort Atkinson, WI**

Prepared for: Rebecca Houseman
City Manager
City of Fort Atkinson, WI
RHouseman@fortatkinsonwi.gov

By: Corey J. Mehaffy, IMPM
CEO
Growth Services Group, LLC
cjm@growthservicesgroup.com

April 20, 2025

Overview

GSG Hospitality Group Experience and Resources

GSG Hospitality Group is a national consulting firm focused on data and primary intelligence insights for local municipalities who are interested in promoting the retail/hospitality/residential sectors in their area. We have a unique approach that focuses on local economic development and the assets that make your community unique. Not a one-size-fits-all approach, but rather a custom approach tailored to your community's specific needs. We are focused on what is advisable for the local economy and we let the data speak for itself.

Our years of experience in regional economic development give us unique insights into what it is like to grow a local geographic economy, and how data about business development should be interpreted. Our experience in conducting market analysis across multiple sectors, gives us the perfect mix for local municipalities interested in feasibility studies, economic impact studies, and regional supplemental market studies. We speak the language of the local economy and our data and instincts are focused on the best possible outcomes for your community or region.

Additionally, we know how to structure our data in ways that developers and industry leaders insist on. We also provide the value-added capability to turn your data into infographics, brochures and even videos to help attract business investment to your area for hospitality and other mixed-use developments. We do this because we know that reports sitting on shelves alone do not help grab the attention of potential investment.

GSG Hospitality Group is uniquely positioned to complete studies, interpret reports based on success patterns, and produce materials that will help you reach your economic development goals.

The principal contact for ongoing services will be Corey J. Mehaffy, IMPM. Other GSG team members include Mr. Randal Weidenaar, and Mr. Dalton Goewey.

Since its inception in 1994, GSG has conducted consulting and research projects for hundreds of clients across the country including state governments, county governments, city governments, colleges/universities, regional economic development groups, site consultants and private businesses. GSG has developed and conducted labor studies, workforce surveys, market feasibility studies as well as education and training needs assessments. These projects have included one-on-one interviews, focused groups and working with project coordinating committees for customization to achieve client goals.

GSG team members have over 60 years of combined economic development experience and are certified to facilitate numerous databases. The use of public and private databases in combination with GSG's proprietary processes uniquely qualifies GSG to provide research, reporting and consulting services for clients. GSG team members are dedicated to accuracy, superior quality, reliability and ethical behavior.

Additional information regarding GSG Hospitality Group is available on the company's website at <https://www.gsghospitalitygroup.com/>

A Few of Our Valued Clients:



Project Team

Corey J. Mehaffy, IMPM, CEO <https://www.linkedin.com/in/cmehaffy>

Corey J Mehaffy is the executive vice president and general manager of Orscheln Properties. Prior to joining the Orscheln team, Corey served as the president of two regional economic development organizations directing business attraction, business retention and expansion, and entrepreneurship initiatives for multiple counties in Northeast Missouri.

Prior to his 15 years in economic development, Corey held several senior management positions in a variety of industries from higher-ed, to finance and retail, while owning several businesses. Corey has more than 30 years of experience in business development.

Corey has a bachelor's degree in business from William Woods University. Corey has completed several professional development programs including Experience in Community Enterprise and Leadership Development, Heartland Economic Development Course, Association of Business Administrators of Christian Colleges Certification Program, and McConkey-Johnson International Fundamentals of Development, and Performance Measurements for Effective Management of Non-Profit Organizations from Harvard University. Corey is a graduate of the International Economic Development Council and the University of Oklahoma's Economic Development Institute. In addition, Corey holds a professional certification as an Inland Marine Port Manager.

Randal Weidenaar <https://www.linkedin.com/in/randalweidenaar>

Randal Weidenaar is a marketing professional specializing in creating market energy. He knows how to connect products with markets through creative intuition like few can. Ideas are his greatest asset and result in new business, stunning marketing campaigns, and compelling stories.

Randal was educated in Europe and worked there for a decade. This cross-cultural experience gives him unique insight into what makes people tick. Randal founded his own marketing business in Philadelphia in the early 1990s and later merged with a Chicago based firm to forge Ergo Creative. Randal also has unique technical abilities in the areas of web development, video production, internet savvy, and programming. The convergence of business, social experience, and technical skills that Randal brings is truly unique.

Randal has created new brands and breathed new life into existing ones. His focus is in the areas of identity, branding, Internet marketing strategies, and product development. Some notable engagements are: US Cellular, AccuWeather, Moberly Area Economic Development Corporation, Franciscan Health Systems, CHS, Bluewater, and Sam's Health Mart.

Randal lives on his farm in central Missouri with his wife and two daughters. He is an avid mountain biker and into sustainable farming. His faith is deep part of who he is and what gives him life.

Specialties: Web Content Development, Video, Photography, Writing, Identity, Branding, Market Strategies, Web design and Internet Campaigns

Dalton Goewey <https://www.linkedin.com/in/dalton-goewey-a1397022b/>

Dalton is the property operations specialist at Orscheln Properties Co. L.L.C. He joined the Orscheln team in 2023. Dalton organizes asset management, tenant services and marketing efforts. He also assists in the coordination of the safety program with Orscheln Risk Management.

Prior to joining OP, Dalton worked as a credit analyst at Great Rivers Bank. In addition to this, he served as a sponsorship coordinator and core group member of the Ignite Program; a partnership dedicated to fostering an entrepreneurial ecosystem in Northeast Missouri. Dalton became involved with Ignite during his time as an intern at the Hannibal Regional Economic Development Council. At HREDC, he assisted the director of economic development and the entrepreneurship specialist with economic development projects.

Dalton is a research analyst for Growth Services Group. There, he manages a variety of projects including hotel feasibility studies and labor studies. Dalton has a bachelor's degree in economics from Truman State University. There, he was a member of the Bulldog Student Investment Fund and the business fraternity Alpha Kappa Psi

Scope of Work and Pricing

The GSG team is grateful for the opportunity to submit this proposal for consideration. The GSG team believes that the City of Fort Atkinson is uniquely positioned to capture new revenues from new retail/mixed-use development opportunities. To that end, the GSG team is honored to propose the following products for your consideration:

GSG RETAIL MARKET STUDY

Product Description:

GSG will provide a full Retail Market Study for the subject area that is customizable to meet the needs of our clients. This Market Study provides a demographic and economic overview of the subject area to determine the overall potential for the expansion of an existing project or a new greenfield retail development. The final report is designed to assist communities/developers in attracting retailers, restaurants and other service businesses to the subject area. In addition, the final report is intended to identify business types, opportunities and in some cases specific retailers, restaurants and service businesses that may be inclined to consider investment in the subject area.

GSG will analyze market conditions, economic and demographic factors, and site conditions to determine their impact on the proposed retail development project. GSG will conduct an extensive retail analysis of the subject area including the 15-minute and 20-minute drive times. The analysis will focus on several areas including demographic findings, community survey findings and taxable retail sales findings. GSG will provide an in-depth analysis of the area's population, employment, income, housing, commuting patterns, traffic counts, trade area and actual/potential sales dollars for various retail segments.

The GSG Retail Market Study provides a comprehensive analysis and survey of the retail market conditions in the subject area. While GSG will customize the scope of the Retail Market Study to reflect the individual needs of our clients, a typical Retail Market Study will include the following:

- Executive Summary
- Demographic Profile
- Trade Area & Site Evaluation
- Market Forces & Local Views/Needs – Survey
- Targeted Retailers, Restaurants & Service Businesses

Pricing:

GSG will provide a GSG Retail Market Study as described in the scope of work above for a lump sum price of **\$12,500.00, plus travel expenses**. The enclosed Product Work Order (Exhibit A) details the terms by which GSG proposes to provide a GSG Retail Market Study for the City of Fort Atkinson as requested. This pricing assumes assistance from the city in distributing a link to the electronic survey via utility bills and other electronic means available to the city and its partner organizations.



Exhibit A

Retail Market Study Product Work Order

GSG Retail Market Study

Item	Unit Price	Quantity	Total
Retail Market Study	\$12,500	1	\$12,500
Contents: Executive Summary, Demographic Profile, Trade Area & Site Evaluation, Market Forces & Local Views/Needs, Targeted Retailers, Restaurants & Service Businesses			
Plus Travel Expenses			TBD
Taxes—Tax Exempt Status	\$0		\$0
Core GSG Retail Market Study Sub-Total			\$12,500
Product Work Order Total			\$12,500

Agreement for Services

The City of Fort Atkinson (Client) hereby requests and contracts the services of the Growth Services Group, LLC (GSG) and agrees to the following terms:

Upon execution of this agreement, Client agrees to pay a non-refundable deposit of 50 percent (\$6,250) of the total amount outlined on the Product Work Order, incorporated herein and attached hereto as Exhibit 1, and the remaining balance (\$6,250) shall be due and payable within 15 days of completion and acceptance of the final report (s). A service charge of 1.5% will be applied monthly on all overdue invoices. Should this agreement be executed without a deposit being paid, no work shall begin until the deposit is received in full.

Any modification of this agreement or additional obligations assumed by either party in connection with this agreement shall be binding only if executed in writing, signed by the parties, and attached hereto as an addendum.

Should any modification or additional obligation be made by either party, said modifications and the additional obligations shall be subject to the terms of this agreement, unless stated otherwise in the addendum.

GSG shall perform the services outlined in the Product Work Order, attached hereto as Exhibit 1 and incorporated herein.

GSG represents to Client, stipulates, and agrees that it shall perform all work specified in this agreement and the Exhibits attached hereto, as an independent contractor.

This agreement and the Exhibits attached hereto shall constitute the entire agreement by and between the parties. Any prior understandings or representations of any kind proceeding the execution of this agreement shall not be binding upon either party except to the extent that those agreements are incorporated herein.

This Agreement shall be construed in accordance with and governed by the laws of the State of Missouri. In the event any action is filed in a court of law in relation to this agreement or any services related hereto, venue and jurisdiction shall be proper in Randolph County, Missouri unless otherwise agreed to by the parties. Should any action be filed in regard to this agreement, the unsuccessful party in that action shall pay the successful party, in addition to all sums that either party may be called upon to pay, reasonable sums for the successful party's attorney's fees as well as interest on any judgement obtained.

This agreement may be executed in any number of counterparts, each of which shall be deemed to be an original, but all of which together shall constitute but one in the same instrument.

Should any provision of the Agreement be found to be invalid or unenforceable, for any reason, the other remaining provisions shall remain in full force and effect.

Financial Worksheet

Item	Price
Core GSG Retail Market Feasibility Sub-Total	\$12,500
Product Work Order Sub-Total	\$12,500
Total	\$12,500

Signature: _____ Date: _____
City of Fort Atkinson (Client)

Signature: _____ Date: _____
Growth Services Group (GSG)

GSG **Retail** **Market Study** Moberly, Missouri



TYPES OF ANALYSIS

DEMOGRAPHIC PROFILE

TRADE AREA

SITE EVALUATION

MARKET FORCES

LOCAL VIEWS

TARGETED RETAIL

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I. PROJECT OVERVIEW

SPONSOR

Michael Bugalski, President
Moberly Area Economic Development Corporation
115 N Williams
Moberly, MO 65270
(660) 263-8811

PURPOSE OF THE FINAL REPORT

This Retail Market Study was designed to examine the potential for Moberly, Missouri to attract retailers, restaurants and services, as well as to be used as a due diligence tool for developing multiple prime retail sites within the community.

This Final Report is intended to identify business types, opportunities, and in some cases specific retailers, restaurants, and services for potential development opportunities in Moberly, Missouri.

RETAIL SITES

The proposed sites as presented by the City include:

Site 1: NW Intersection of US Highway 24 and US Highway 63

Site 1 is 4.6 Acres with frontage to US 24 adjacent to the intersection of US Highway 24 and 4-lane US Highway 63 with visibility from the highway. Current businesses include Sam's Drug Store, Century 21 McKeown and Associates.

Site 2: SE Intersection of US Highway 24 and US Highway 63 Site

Site 2 is 30 lots from 0.6 acres to 1.94 acres. Prime retail or office lots. Located in new subdivision anchored by Lowe's. No side boundary building set-backs so multiple lots can be purchased and a single structure built across the lots. High visibility from US Highway 24 and 4-lane US Highway 63.

Site 3: Business 63

Site 3 is 10.5 acres of prime retail land with frontage on Business 63 including one 1 acre out lot. Surrounding businesses include McDonald's, Long John Silvers, Taco Bell, Burger King, and more.

Site 4: US Highway 24

Site 4 is 7.1 acres with frontage to US Highway 24 one-half mile from the interchange of Highway 24 and Business 63. Surrounding businesses include Art's Appliance and Walgreens.

HOW TO USE THIS REPORT

A developer should use this report as an informational tool for potential planners, retailers, developers, financiers, other businesses, economic development organizations, etc. in their due diligence and decision making process. The suggestions and recommendations in this report should be used as a guide only for that process.

This study was conducted by independent consulting firm Growth Services Group.

II. EXECUTIVE SUMMARY

INTRODUCTION

The purpose of this study is to determine the potential for the development of one or more sites located in Moberly, Missouri. The Greater Market Area, the Moberly Trade Area, and the proposed Retail Sites have been evaluated for potential restaurant, retail, and service operators as the locations dictate.

While the Moberly Area has considerable potential in terms of livability and a stable population, it is primarily a location that serves the community and the adjacent unincorporated area of Randolph County. Moberly and its Trade Area is primarily a residential community with a good mix of moderate to upper middle-income neighborhoods. In the unincorporated areas, agriculture still has a dominant presence. The community benefits from significant traffic counts on Highways 24 and 63 and is strategically located just north of Columbia, Missouri.

The Retail Market Study provides the developer and others a base of information not only of the community and trade area, but also a Greater Market Area. The greater regional influences are important considerations in any decision-making process.

GENERAL FINDINGS, OPPORTUNITIES AND CHALLENGES

The Retail Market Study shows Moberly as a proud and stable community with a sense of purpose and direction. The City, for its size, has professional administration and has conducted a Community Survey for feedback and direction.

The research for this study focused on four areas:

- Demographic Profile;
- Trade Area and Site Evaluation;
- Market Forces & Local Views and Needs; and
- Targeted Retailers, Restaurants and Service Businesses.

As a basis of information, the study provides information on population, employment, income, housing, community patterns, sales and local shopper views and needs; and, to the degree possible, makes comparisons for market differentiation.

KEY FINDINGS

- Moberly is center to a Greater Market Area with a population of over 29,000 (15 Mile Ring) with over 10,500 Households. The Trade Area saw Total Taxable Sales of \$291,546,482 in 2017.
- Randolph County (Moberly Trade Area) is currently losing retail and restaurant sales to areas outside the county with a moderately-neutral pull factor of 0.80. In addition, respondents to the 2019 Community Survey indicated strong local support for retailers.
- The Trade Area consists largely of consumers in the Southern Satellites (10A), Small Town Simplicity (12C) and Rooted Rural (10B) Tapestry Segments.
- The proposed development sites offer proximity and/or excellent visibility to US Highways 63 and 24.
- The Daytime Population in Moberly grows by nearly 14 percent as commuters travel to the market for employment.
- Moberly has an averaged daily traffic count of over 15,000, one of the higher traffic counts in the area located outside of core metro cities.
- The 2017 Taxable Sales reflect that Moberly has one of the higher sales per capita (\$18,159) of comparable Missouri communities.
- Taxable sales for Moberly are projected to grow by 5% annual rate from 2017 through 2022.
- Attracting new retail business was ranked a top three priority of the business development preferences in the Community Survey. The 357 respondents indicated a low satisfaction with current retail, service and dining options which confirms a significant gap for new development opportunities.

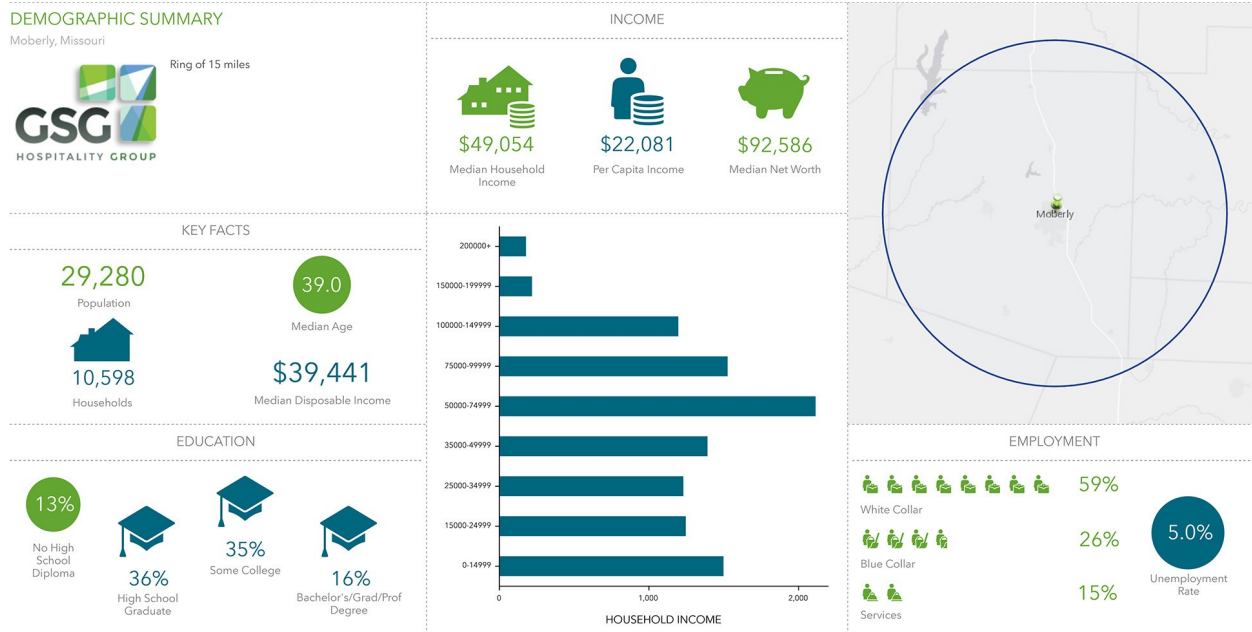
The key challenge will be to what degree the new developments and vendors can capture market share from other competitive markets identified by respondents who indicated shopping activity outside the Moberly market within the last 60 days. The high ratio of the workforce working inside the community adds to the opportunity. Retailers with strong regional and national brands and management can make a significant difference. The ability to capture transient business off the highway can also add to the mix.

CONCLUSION

The study concludes that the proposed development sites are viable offering a potential excellent future with the right mix of vendors matching the community's needs and the shopper's buying habits. In addition, opportunity exists with the high traffic and highway visibility to capture convenience and impulse buying for additional sales. Current experience and feedback shows local residents are willing to change with the right shopping options to support the community.

III. DEMOGRAPHIC PROFILE

Greater Market Area Moberly, MO (15 Mile Radius)



OVERVIEW

The Demographic Profile, with data available from public sources such as the U.S. Census, the Bureau of Labor Statistics and the Missouri Department of Economic Development MERIC, as well as subscription sources like ESRI, provides a quick overview of a larger market area—highlighting information related to population, employment, income, and commuting patterns. Where possible, this review makes direct comparisons of the local Market to the State of Missouri and the USA.

The presentation in the following charts and tables is used to analyze the local market for trends with the region, state and nation. The City of Moberly and the proposed sites are located in central Randolph County. Its location on Interstate 63 provides both opportunities and challenges for Moberly and its trade area. The Demographic portion of this study will provide a better appreciation of the forces and trends currently at work and potential impacts for the future.

The Infographic above provides a demographic summary of the Greater Market Area including population, households, income and more.

POPULATION

The population of the City of Moberly grew from 13,622 (2000 census) to 13,986 (2010 census) but has declined slightly to 13,876 according to 2019 estimates. The City of Moberly is considered a magnet community as the Daytime Population increases to 15,356 with commuters traveling into the community for shopping, entertainment and employment.

Total households declined slightly from 4,988 (2000 census) to 4,973 (2010 census) and has further declined to 4,897 according to the 2019 estimates.

The Median Household Income in Moberly continues to grow at \$39,315 according to 2019 estimates. The Median Age in Moberly is 37.2 compared to the US Median Age of 38.5. The Male Population is 51.9% with Female Population at 48.1%.

Refer to Appendix E for more detailed Demographic Information for Moberly.

MOBERLY MARKET AREA POPULATION TRENDS AND COMPARISONS					
	2000	2010	2019	% Change 2000-2010	% Change 2010-2019
<i>Moberly</i>	13,622	13,986	13,876	2.7%	-0.8%
5 Mile Ring	16,716	17,156	17,072	2.6%	-0.5%
10 Mile Ring	23,021	23,630	23,517	2.6%	-0.5%
15 Mile Ring	28,460	29,422	29,280	3.4%	-0.5%

Source: ESRI

MOBERLY MARKET AREA TOTAL HOUSEHOLDS TRENDS AND COMPARISONS					
	2000	2010	2019	% Change 2000-2010	% Change 2010-2019
<i>Moberly</i>	4,988	4,973	4,897	-0.3%	-1.5%
5 Mile Ring	6,151	6,182	6,124	0.5%	-0.9%
10 Mile Ring	8,504	8,591	8,511	1.0%	-0.9%
15 Mile Ring	10,506	10,700	10,598	1.8%	-1.0%

Source: ESRI

MOBERLY MARKET AREA TOTAL HOUSEHOLDS TRENDS AND COMPARISONS				
	Median HHI	Median Age	Male	Female
<i>Moberly</i>	39,315	37.2	51.9%	48.1%
5 Mile Ring	43,604	37.9	52.6%	47.4%
10 Mile Ring	47,303	38.7	52.8%	47.2%
15 Mile Ring	49,054	39.0	52.4%	47.6%
US Average	60,548	38.5	49.2%	50.8%

Source: ESRI

POPULATION AGE DISTRIBUTION

In the age category, residents of Moberly have a slightly lower median age at 37.2 than the US average at 38.5. The 18+ population remains steady through out the Greater Market Area at roughly 78% of the total population.

Refer to Appendix E for more detailed Demographic Information for Moberly.

2019 POPULATION AGE DISTRIBUTION														
All Residents														
	Medi-	0-4	5-9	10-14	15-24	25-34	35-44	45-54	55-64	65-74	75-84	85+	18+	Total
Moberly	37.2	6.1%	6.2%	6.0%	13.7%	14.8%	13.5%	12.3%	11.2%	8.4%	5.0%	2.8%	78.4%	13,874
5 Mile Ring	37.9	5.9%	6.1%	6.0%	13.2%	14.7%	13.3%	12.6%	11.9%	8.8%	4.9%	2.5%	78.6%	17,072
10 Mile Ring	38.7	5.8%	6.1%	6.0%	12.7%	14.4%	13.0%	12.8%	12.6%	9.4%	4.9%	2.3%	78.8%	23,516
15 Mile Ring	39.0	6.1%	6.4%	6.3%	12.5%	13.6%	12.7%	12.8%	12.9%	9.7%	4.9%	2.1%	77.7%	29,279

Source: ESRI

POPULATION BY RACE

Nearly all residents of Moberly (96.5%), reported one race.

Refer to Appendix E for more detailed Demographic Information for Moberly.

2019 POPULATION BY RACE (Census Profile)						
	White	Black	American Indian	Asian	Pacific Islander	Other
Moberly	86.0%	8.2%	0.5%	1.3%	0.0%	3.9%

Source: ESRI

EMPLOYMENT

As mentioned earlier in this report, Moberly is considered a Magnet community with a Daytime Population that grows by nearly 14%. This increase is due in large part to a number of major employers providing quality employment opportunities to residents in the area. The following tables below show the number of businesses by NAICS code as well as the number of employees by NAICS code in the community.

Another indicator of Industry Employment is the relationship of Sector Employment by Industry to total Employment. An example would be Retail Trade with over 14% of total jobs in Moberly.

Business Sector (by NAICS codes)	Businesses	% of total	Employees	% of total
Retail Trade	134	18.2	1349	14.5
Other Services (except Public Administration)	104	14.1	455	4.9
Health Care & Social Assistance	75	10.2	1339	14.3
Finance & Insurance	66	8.9	636	6.8
Accommodation & Food Services	46	6.2	569	6.1
Total	738	100	9,332	100

Source: ESRI

Business Sector (by NAICS codes)	Employees	% of total	Businesses	% of total
Retail Trade	1349	14.5	134	18.2
Health Care & Social Assistance	1339	14.3	75	10.2
Educational Services	1247	13.4	22	3
Manufacturing	983	10.5	24	3.3
Administrative & Support & Waste Management & Remediation Services	692	7.4	22	3
TOTAL	9,332	100	738	100

Source: ESRI

Refer to Appendix E for more detailed Demographic Information for Moberly.

The chart below lists the top ten employers by number of employees in Moberly. Major employers include the healthcare, retail and industry sectors.

BUSINESS NAME	EMPLOYEES
Moberly Area Correctional Center	600
Walmart-Distribution Center	445
Moberly Regional Medical Center	300
Orscheln Farm and Home Distribution Center	375
Orscheln Products	340
Associated Electric Cooperative	250
Moberly Area Community College	220
DSV	220
Cardinal Healthcare	175
Norfolk Southern	175

Source: City of Moberly

The unemployment rate for Moberly and Randolph County normally runs consistent with the state and national averages and indicates a stable industry base and productive workforce. The unemployment rate for Randolph County is 3.4% and compares with Missouri at 3.1%.

Another element when comparing Industry Employment with Civilian Employment is that Civilian Employment counts all people working including self-employed, as well as job holders; whereas Industry Employment counts jobs and those on a payroll where withholdings are taken from their checks.

RANDOLPH COUNTY, MO				
Civilian Employment Statistics				
	Labor Force	Employment	Unemployment	Unemployment Rate
Randolph County	10,183	9,832	351	3.4%
State of Missouri	3,060,453	2,966,425	94,028	3.1%
USA	162,655,000	157,152,000	5,503,000	3.4%

Source: MERIC May 2019 Local Area Unemployment Statistics

Civilian Employment: Employment of all residents living in county and working anywhere.

CIVILIAN EMPLOYMENT				
Randolph County Annual Trends				
Annual Averages	Labor Force	Employment	Unemployment	Unemployment Rate
2014	10,490	9,774	716	6.8%
2015	10,574	9,942	632	6.0%
2016	10,602	10,047	555	5.2%
2017	10,291	9,826	465	4.5%
2018	10,257	9,863	394	3.8%

Source: MERIC May 2019 Local Unemployment Statistics

INCOME

The Median Household Income for 2019 in Moberly is \$39,315 and is estimated to increase by 18.8% by 2024. The Median Home Value in Moberly for 2019 is \$93,391 compared to the State of Missouri of \$167,653. The Per Capita Income in Moberly in 2019 is \$20,542 as compared to the State of Missouri's \$29,924.

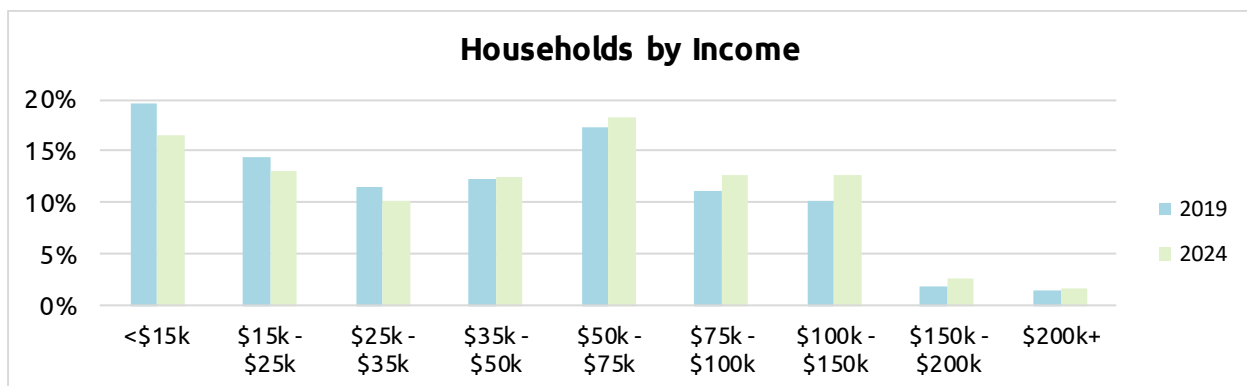
Forty-two percent of Households in Moberly have a Household Income of over \$50,000. Over 54% of the total 5,650 Moberly housing units are owner occupied with 32% renter occupied and 13.3% vacant. The average household size in Moberly is 2.5. There are 2,930 families in Moberly and the average family size is 3.18.

MOBERLY INCOME STATISTICS				
	2019 Median HH Income	2024 Estimates MHHI	2019 Per Capita Income	2019 Median Home Value
Moberly	\$39,315	\$46,723	\$20,542	\$93,391
5 Mile Ring	\$43,604	\$51,113	\$21,197	\$101,535
10 Mile ring	\$47,303	\$53,284	\$21,686	\$106,373
15 Mile Ring	\$49,054	\$54,303	\$22,081	\$113,405
Missouri	\$54,440	\$61,360	\$29,924	\$167,653

Source: ESRI

MOBERLY HOUSEHOLDS BY INCOME STATISTICS									
	<\$15,000	\$15,000 - \$24,999	\$25,000 - \$34,999	\$35,000 - \$49,999	\$50,000 - \$74,999	\$75,000 - \$99,999	\$100,000 - \$149,999	\$150,000 - \$199,999	\$200,000 +
Moberly	19.7%	14.5%	11.5%	12.3%	17.4%	11.2%	10.1%	1.9%	1.4%

Source: ESRI



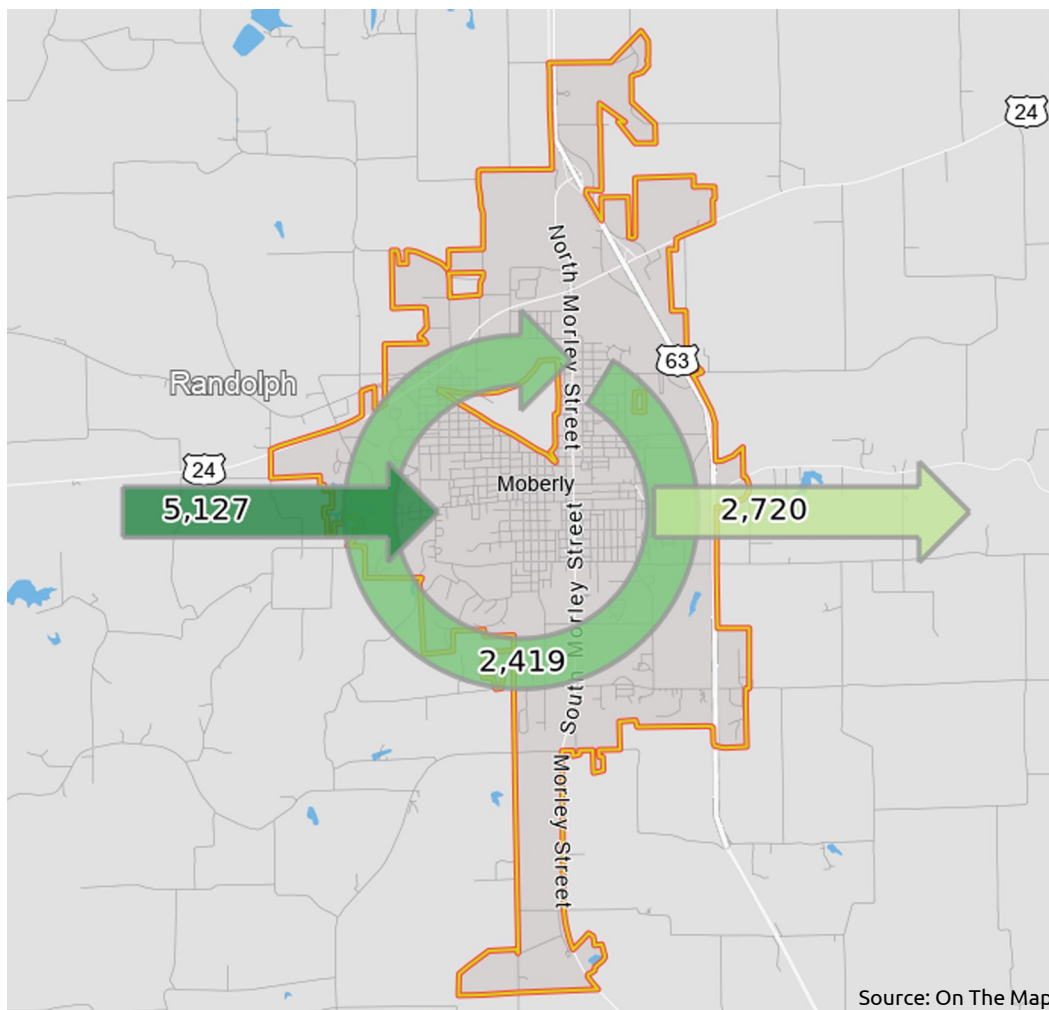
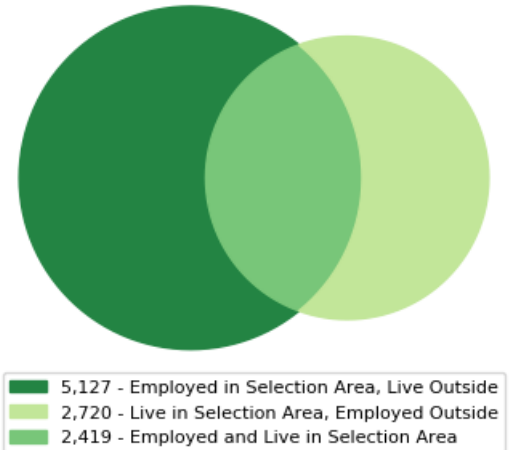
Source: ESRI
Refer to Appendix E for more detailed Demographic Information for Moberly.

COMMUTING PATTERNS

Work commuting patterns are important elements for influencing shopping patterns. One of the factors for the increased Daytime Population (from 13,867 to 15,788) is the number of commuters traveling to work in Moberly each day. According to US Census data, displayed here, Moberly is considered a Magnet community as more workers come to the community each day than leave it. The map below indicates an inflow of 5,127 workers who live outside the community and travel to the community for work each day while 2,720 workers who reside in the community leave each day for external jobs.

The data show that 5,139 workers live in the City of Moberly, of which, 2,419 are employed in the community and 2,720 are employed outside the community. In addition, of the 7,546 workers employed in the community, 5,127 live outside the city.

Inflow/Outflow Job Counts in 2015



The charts below detail the job characteristics of workers who reside and work in Moberly as well as workers who flow in and out of the community for employment. The average one way commute for Moberly workers is 19 minutes compared to 23 minutes for Missouri and 26 minutes for the US. A larger percentage of workers (3.5%) walk to work as compared to Missouri (1.9%) and the US (2.8%).

Outflow Job Characteristics (Primary Jobs)	2015	
	Count	Share
External Jobs Filled by Residents	2,720	100.0%
Workers Aged 29 or younger	684	25.1%
Workers Aged 30 to 54	1,426	52.4%
Workers Aged 55 or older	610	22.4%
Workers Earning \$1,250 per month or less	643	23.6%
Workers Earning \$1,251 to \$3,333 per month	1,275	46.9%
Workers Earning More than \$3,333 per month	802	29.5%
Workers in the "Goods Producing" Industry Class	405	14.9%
Workers in the "Trade, Transportation, and Utilities" Industry Class	772	28.4%
Workers in the "All Other Services" Industry Class	1,543	56.7%

Source: On The Map

Inflow Job Characteristics (Primary Jobs)	2015	
	Count	Share
Internal Jobs Filled by Outside Workers	5,127	100.0%
Workers Aged 29 or younger	1,230	24.0%
Workers Aged 30 to 54	2,682	52.3%
Workers Aged 55 or older	1,215	23.7%
Workers Earning \$1,250 per month or less	1,214	23.7%
Workers Earning \$1,251 to \$3,333 per month	2,657	51.8%
Workers Earning More than \$3,333 per month	1,256	24.5%
Workers in the "Goods Producing" Industry Class	624	12.2%
Workers in the "Trade, Transportation, and Utilities" Industry Class	1,306	25.5%
Workers in the "All Other Services" Industry Class	3,197	62.4%

Source: On The Map

Interior Job Characteristics (Primary Jobs)	2015	
	Count	Share
Internal Jobs Filled by Residents	2,419	100.0%
Workers Aged 29 or younger	594	24.6%
Workers Aged 30 to 54	1,261	52.1%
Workers Aged 55 or older	564	23.3%
Workers Earning \$1,250 per month or less	653	27.0%
Workers Earning \$1,251 to \$3,333 per month	1,226	50.7%
Workers Earning More than \$3,333 per month	540	22.3%
Workers in the "Goods Producing" Industry Class	294	12.2%
Workers in the "Trade, Transportation, and Utilities" Industry Class	546	22.6%
Workers in the "All Other Services" Industry Class	1,579	65.3%

Source: On The Map

COMMUTING STATISTIC	MOBERLY	MISSOURI	NATIONAL
Average one way commute	19 min.	23 min.	26 min.
Workers who carpool	5.9%	9.1%	9.3%
Workers taking public transportation	0.0%	1.5%	5.1%
Workers who walk to work	3.5%	1.9%	2.8%
Working from home	3.2%	4.6%	4.6%

Source: <http://www.areavibes.com/>

IV. TRADE AREA & SITE EVALUATION

TRADE AREA EVALUATION

The Trade Area Map on the following page is a radius map with five, ten, and fifteen mile circles to show distances surrounding Moberly along major highways. The current population of the Trade Area is estimated at 29,280 with approximately 10,598 households. The Median Household Income in the trade area is \$49,054 with a Median Home Value of \$113,405.

With a number of quality job opportunities in Moberly, the Daytime Population grows by nearly 14% as workers travel into the market for work. This increased traffic accounts for additional retail sales for local firms. Recent estimates show an expected continued increase in home values, median household income and per capita income.

The top three tapestry segments for the Trade Area are Southern Satellites (10A), Small Town Simplicity (12C) and Rooted Rural (10B). These segments are largely comprised of married couples, some farmers, or retired or younger couples typically bound by community ties. They embrace the slower pace of life but actively participate in outdoor activities and community events. Traditional and patriotic, these residents support their local businesses, always buy American, and favor hard work.

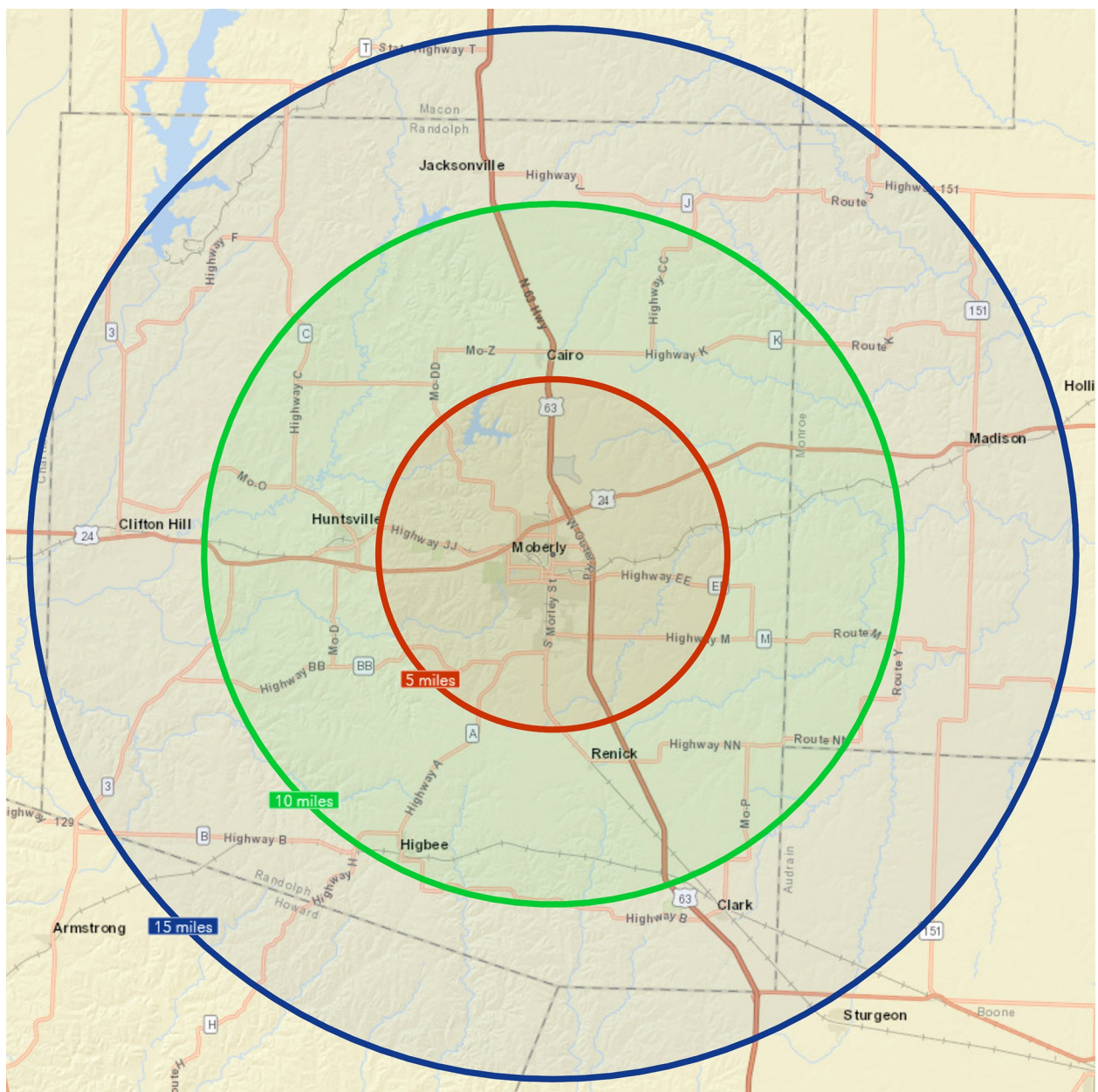
TRADE AREA DEMOGRAPHICS				
AREA	Moberly	5 Mile Ring	10 Mile Ring	15 Mile Ring
Population	13,876	17,072	23,517	29,280
Households	4,897	6,124	8,511	10,598
Median Home Value	\$93,391	\$101,535	\$106,373	\$113,405
Persons Per House	2.49	2.46	2.47	2.53
White Population	86.0%	87.3%	89.1%	90.6%
Median Household Income	\$39,315	\$43,604	\$47,303	\$49,054
Civilian Employment	7,984	8,416	9,333	10,462
Number Firms	738	819	962	1,059
Bachelors Degree or Higher	17.2%	16.6%	15.4%	14.6%
Poverty	22.1%	19.5%	17.6%	16.3%

Source: ESRI; U.S. Census Bureau, 2013-2017 American Community Survey
Refer to Appendix E for more detailed Demographic Information for Moberly.

TRADE AREA MAP

Moberly, MO Market Area
5, 10, 15 Mile Rings
Population: 29,280

The general market area for this proposed development is Moberly, Missouri, a city in Randolph County in north central Missouri, located at 39°25'06"N 92°26'18"W. It has a population of 13,876 according to 2019 estimates and offers a variety of local support for retail, dining, and community events. It is about 45 minutes by car from Columbia, Missouri (population 123,610) along Highway 63.

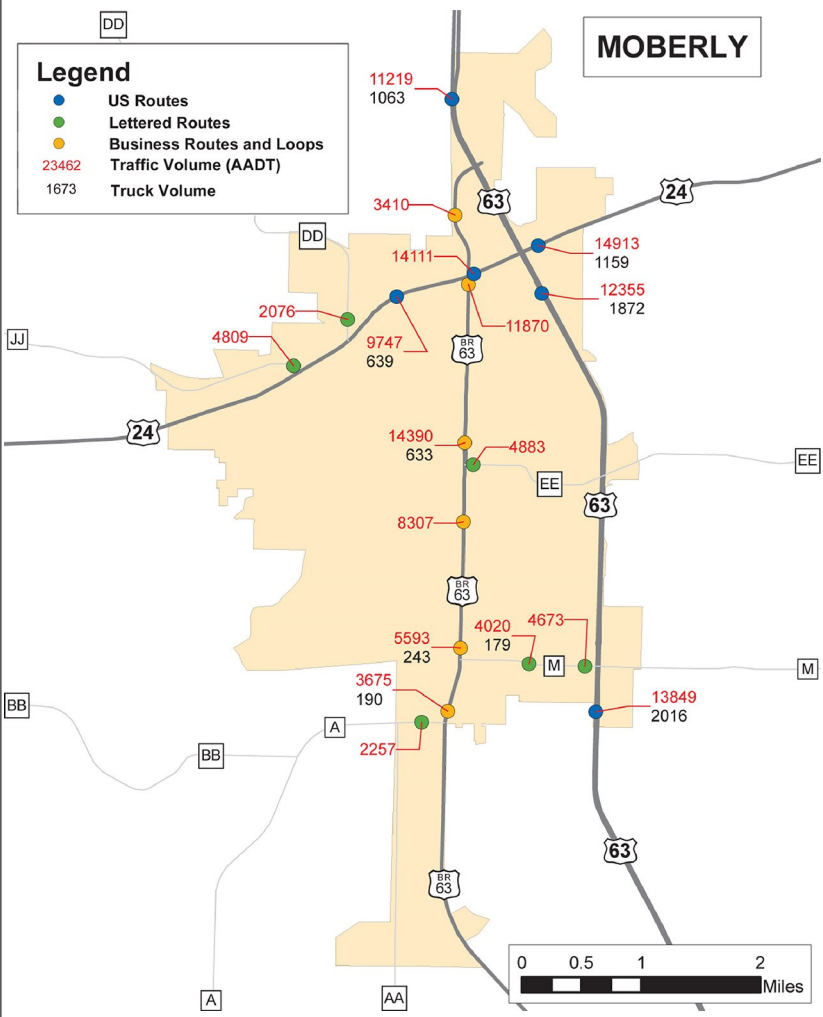


TRADE AREA AMENITIES

- Trophy Country -The Rodgers family has owned and operated this 6,200 acre ranch since 1981. This 10 mile square, contiguous unit contains one of the largest privately owned and managed sport fisheries in North America. It consists of 800 surface acres of water with hundreds of miles of shoreline.
- The Moberly Region has two public golf courses: Heritage Hills Golf Course, and Windmill Golf Course
- The Moberly Area Council on the Arts and Moberly Area Community College are partners dedicated to the sponsorship and growth of arts programs for the enjoyment of all people in Moberly and its surrounding areas.
- Randolph County Raceway is a high banked 1/2 mile Clay oval located near Moberly, Missouri. Regular races are held throughout the fair weather months. In addition, HLR Motorsports Motor-cross Track is a Natural Terrain Motocross & Super-cross tracks open for practice & racing.
- The area features multiple lakes and wildlife areas, including Rudolf Bennitt State Wildlife Area with 3,575 acres of forested area, a 48 acre lake, and a well maintained 12.5 mile trail system; Thomas Hill Lake consisting of 4,950 acres of lake and conservation area with a diverse fish population and warm waters that provide unique winter fishing opportunities; and Sugar Creek Lake featuring 320 acres of lake and wooded area.
- The Moberly School District has an enrollment of 699 students in Senior High School, 523 in Middle School, and 1,040 in the Moberly Elementary Schools. The city is also home to Moberly Area Community College with 4,920 total enrollees (2,263 full-time) and Central Christian College of the Bible with 250 full-time students.

AVERAGE DAILY TRAFFIC (ADT)

Moberly, MO—Average Daily Traffic Counts



SITE EVALUATIONS

SITE EVALUATION - Moberly Trade Area



Moberly has several potential locations available for a new mixed-use development. Four primary locations were evaluated for this report due to their closer proximity to Highways 63 and 24. The potential sites are shown on the map above.

Site 1: NW Intersection of US Highway 24 and US Highway 63

Site 1 is 4.6 Acres with frontage to US 24 adjacent to the intersection of US Highway 24 and 4-lane US Highway 63 with visibility from the highway. Current businesses include Sam's Drug Store, Century 21 McKeown and Associates.

Site 2: SE Intersection of US Highway 24 and US Highway 63 Site

Site 2 is 30 lots from 0.6 acres to 1.94 acres. Prime retail or office lots. Located in new subdivision anchored by Lowe's. No side boundary building set-backs so multiple lots can be purchased and a single structure built across the lots. High visibility from US Highway 24 and 4-lane US Highway 63.

Site 3: Business 63

Site 3 is 10.5 acres of prime retail land with frontage on Business 63 including one 1 acre out lot. Surrounding businesses include McDonald's, Long John Silvers, Taco Bell, Burger King, and more.

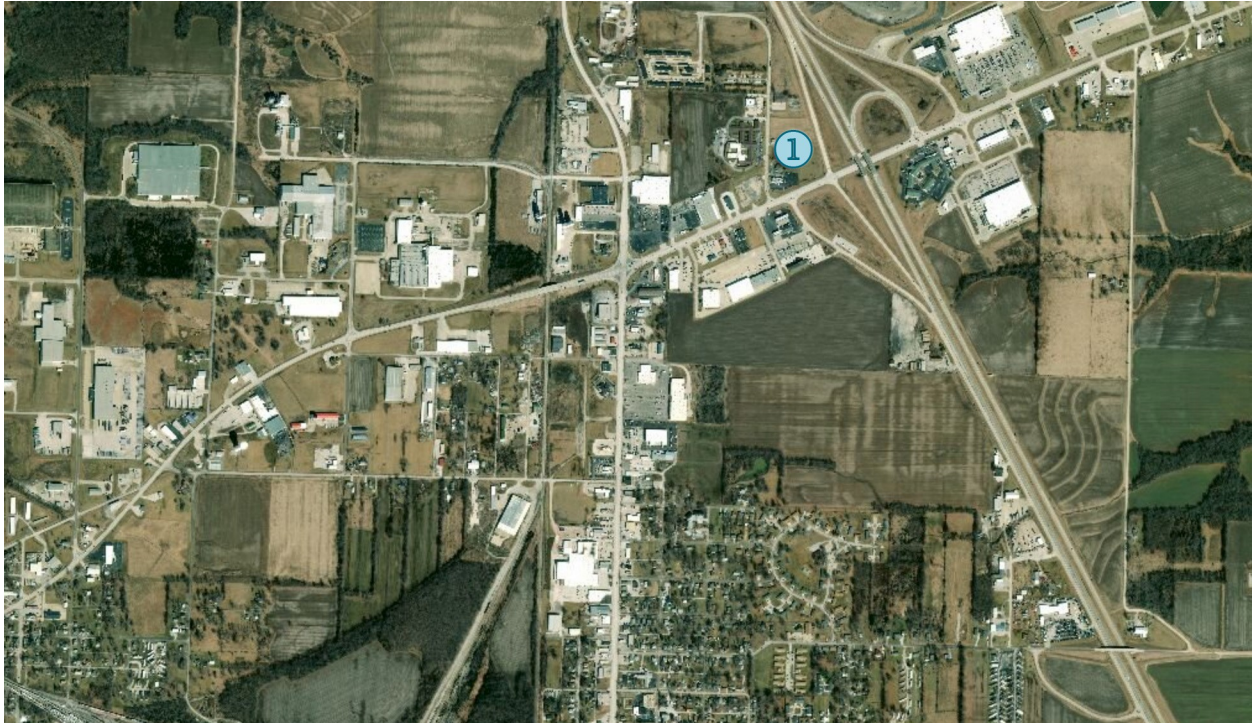
Site 4: US Highway 24

Site 4 is 7.1 acres with frontage to US Highway 24 one-half mile from the interchange of Highway 24 and Business 63. Surrounding businesses include Art's Appliance and Walgreens.

The proposed sites are well positioned to the current and future growth of Moberly and the trade area of Randolph County. The sites should match a mix of retailers, restaurants, and service providers meeting the consumer's current needs and views about products and services. By meeting unmet needs and shopping preferences, the new stores will complement the existing store network with a win-win for the community by meeting the demand and slowly reversing the loss of some sales to outside markets.

The proposed sites and Moberly, Missouri are in the center of a Greater Market Area with a high traffic count and visibility from US Highways 24 and 64 providing strong vendors, with good regional and national brands, to capture sales from outside the trade area. The sites are best suited for vendors committed to quality, convenience, selection, value, and service with hours to accommodate out-of-town workers.

SITE EVALUATION - Site 1: US Highway 24 and US Highway 63



NW Intersection of US Highway 24 and US Highway 63 PROPOSED DEVELOPMENT	
Total Area	4.6 Acres
Site Status	Construction Ready; Undeveloped
Adjacent Land Use	Retail, Residential and Green Field
Street/Highway	Frontage to US 24; Adjacent to intersection of US Highway 24 and US Highway 63
Traffic Count 2019	15,111
Visibility	Excellent Visibility—Visible from both US Highway 24 and US Highway 63
Accessibility	Excellent
Ingress/Egress	Very Good
Utilities	All services on-site and underground
Zoning	General Commercial
Highway Overpass Interchange	Adjacent to intersection of US Highways 24 and 63

SITE EVALUATION - Site 2: US Highway 24 and US Highway 63



SE Intersection of US Highway 24 and US Highway 63 PROPOSED DEVELOPMENT	
Total Area	30 lots from 0.6 acres to 1.94 acres
Site Status	Construction Ready; Undeveloped
Adjacent Land Use	Retail, Residential and Green Field
Street/Highway	Adjacent to intersection of US Highways 24 and 63
Traffic Count 2019	12,890
Visibility	Excellent Visibility—Visible from both US Highway 24 and US Highway 63
Accessibility	Very Good
Ingress/Egress	Very Good
Utilities	All services on-site and underground
Zoning	General Commercial
Highway Overpass Interchange	Adjacent to intersection of US Highways 24 and 63

SITE EVALUATION - Site 3: Business 63



Business 63 PROPOSED DEVELOPMENT	
Total Area	10.5 Acres
Site Status	Construction Ready; Undeveloped
Adjacent Land Use	Retail, Residential and Green Field
Street/Highway	Frontage on Business 63
Traffic Count 2019	12,942
Visibility	Very Good Visibility—Visible from Business 63
Accessibility	Very Good
Ingress/Egress	Very Good
Utilities	All services on-site and underground
Zoning	General Commercial
Highway Overpass Interchange	0.7 Miles from intersection of US Highways 24 and 63

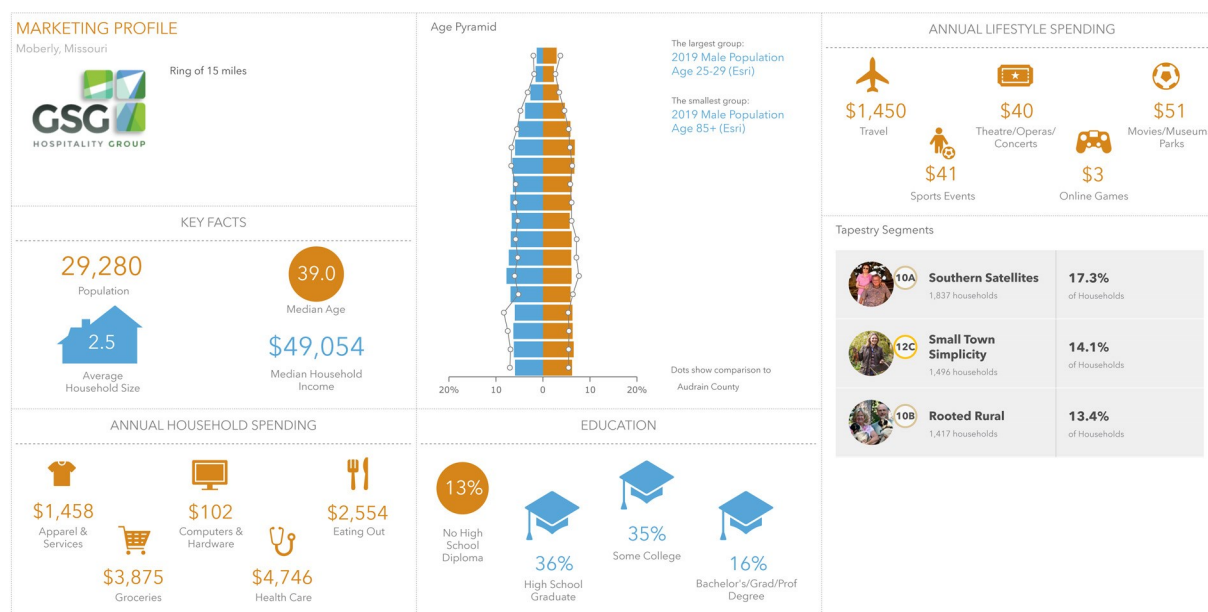
SITE EVALUATION - Site 4: US Highway 24



US Highway 24 PROPOSED DEVELOPMENT	
Total Area	7.1 Acres
Site Status	Construction Ready; Undeveloped
Adjacent Land Use	Retail, Residential and Green Field
Street/Highway	Frontage to US Highway 24
Traffic Count 2019	10,309
Visibility	Good Visibility—Visible from US Highway 24
Accessibility	Very Good
Ingress/Egress	Very Good
Utilities	All services on-site and underground
Zoning	General Commercial
Highway Overpass Interchange	1.1 Miles from intersection of US Highways 24 and 63

V. MARKET FORCES AND LOCAL VIEWS AND NEEDS

OVERVIEW



This section of the study will present an overall market assessment of the Greater Market Area including the Trade Area and Moberly. The following areas will provide information on Taxable Retail Sales from 2014 through 2018 at the county and principal city level. It will provide the same at the Trade Area and Community Level to indicate trends and comparisons to the State of Missouri.

The Gap Analysis provides information on how certain commercial centers pull sales by availability and market presence. A further evaluation is made of market share at the county and state level by store group and then at the community level by NAICS Code. Assessment of comparable communities and number of business locations provides a way of viewing differences and similarities.

An important element is matching the right retail candidates for the community by a quick review of shopper views and needs as determined by feedback from respondents to surveys, projections based on gaps and trends, and assumptions of site impact for retail growth in Moberly.

TAXABLE RETAIL SALES

The first table covers the taxable sales for Randolph County and Moberly. The second table provides the Trade Area Total Consumer Spending, with the third table providing the Trade Area Potential Variables.

GREATER MARKET AREA/STATE TAXABLE SALES						
	2014	2015	2016	2017	2018	Percent Increase from 2014 to 2018
Moberly	258,640,417	253,712,103	248,546,447	250,136,591	260,153,312	0.6%
Randolph County	295,093,485	291,696,607	287,761,762	289,792,884	305,833,756	3.6%
Percent of City to County Sales	88%	87%	86%	86%	85%	

Source: MO Department of Revenue

TRADE AREA TOTAL CONSUMER SPENDING 2017				
	Moberly	5 Mile Ring	10 Mile Ring	15 Mile Ring
Apparel & Services	\$6,478,490	\$8,548,693	\$12,243,803	\$15,453,265
Education	\$4,368,997	\$5,777,482	\$8,187,849	\$10,243,446
Entertainment/Recreation	\$10,406,346	\$13,822,114	\$20,142,003	\$25,812,701
Food at Home	\$16,728,694	\$22,160,678	\$32,189,209	\$41,062,639
Food Away from Home	\$11,189,550	\$14,819,582	\$21,342,314	\$27,065,491
Health Care	\$20,126,665	\$26,771,558	\$39,163,230	\$50,300,949
HH Furnishings	\$6,526,509	\$8,635,475	\$12,428,295	\$15,804,238
Personal Care Products & Services	\$2,673,982	\$3,541,180	\$5,071,166	\$6,410,683
Shelter	\$54,096,851	\$70,739,559	\$99,851,338	\$125,660,816
Support Payments/Contributions	\$7,720,942	\$10,309,658	\$15,052,138	\$19,237,677
Travel	\$6,315,503	\$8,386,433	\$12,058,180	\$15,361,921
Vehicle Maintenance/Repairs	\$3,729,423	\$4,908,209	\$7,079,295	\$9,029,135

Source: ESRI

The above table provides the Trade Area Total Consumer Spending by broad budget categories for 2017.

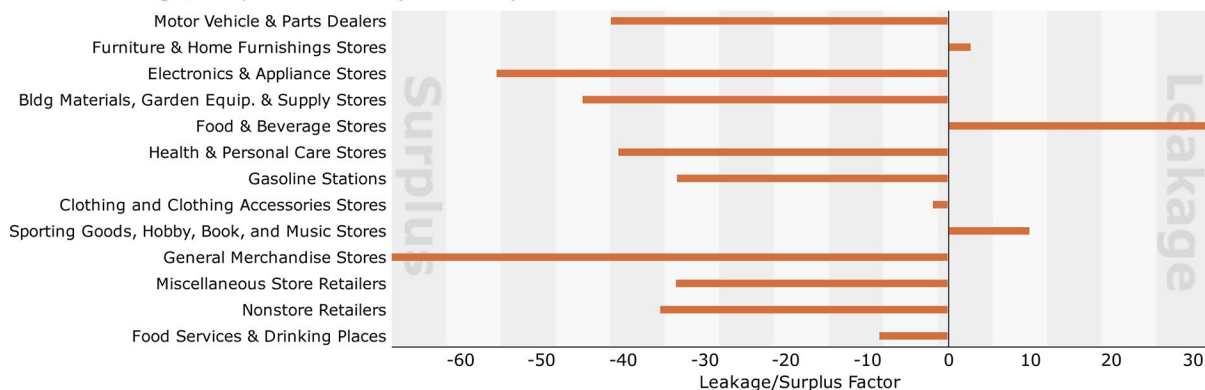
The following table provides the Trade Area Potential Variables regarding supply, demand and leakage/surplus.

Refer to Appendix E for more detailed Demographic Information for Moberly.

TRADE AREA POTENTIAL VARIABLES				
	Moberly	5 Mile Ring	10 Mile Ring	15 Mile Ring
Estimated HH Count	4,897	6,124	8,511	10,598
Total Retail Demand	\$121,925,831	\$157,693,188	\$225,751,790	\$291,546,482
Total Retail Supply	\$287,147,138	\$143,731,218	\$339,272,190	\$347,036,157
Leakage/Surplus	-\$165,221,307	-\$164,477,122	-\$113,520,400	-\$55,489,675
Traffic Count	15,310	15,310	15,310	15,310

Source: ESRI

2017 Leakage/Surplus Factor by Industry Subsector



Retail Trade and Restaurant Pull Factors estimate the number of customers and retail sales that a county attracts, typically from neighboring counties. These pull factors comprise both the retail trade and restaurant industries. A retail trade pull factor greater than one indicates either a gain in customers from other counties or that residents or travelers spent more on retail goods than the state average. A retail trade pull factor less than one indicates either a loss of customers to other counties or that residents or travelers spent less on retail goods than the state average. A retail trade pull factor of one indicates that the county is capturing all the retail trade in the local market or the local residents are spending exactly the same amount on retail sales as the state average.

Retail Trade and Restaurant Pull Factors Across Missouri, 2016



RETAIL POTENTIAL - DEMAND/SUPPLY/LEAKAGE

Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales.

As demonstrated on the previous page, the Moberly Trade Area has a pull factor below one, meaning the area is currently losing retail customers to other counties. The chart below reflects the retail sales associated with the Trade Area's draw indicating that the actual trade area is much larger than Moberly and Randolph County in many sectors. Significant opportunity exists for retailers interested in entering the market.

RETAIL POTENTIAL (DEMAND/SUPPLY/LEAKAGE) BY INDUSTRY SUB-SECTOR					
	Moberly Demand	15 Mile Ring Demand	15 Mile Ring Supply	15 Mile Retail Gap	NAICS
Motor Vehicle & Parts Dealers	\$24,866,052	\$61,110,681	\$66,174,952	-\$5,064,271	441
Furniture & Home Furnishings Stores	\$3,248,589	\$7,525,234	\$3,278,314	\$4,246,920	442
Electronics & Appliance Stores	\$3,097,123	\$7,117,247	\$13,317,426	-\$6,200,179	443
Bldg Materials, Garden Equip. & Supply Stores	\$7,832,715	\$19,810,711	\$22,834,226	-\$3,023,515	444
Food & Beverage Stores	\$18,299,569	\$43,124,742	\$18,800,830	\$24,323,912	445
Health & Personal Care Stores	\$6,634,107	\$16,018,153	\$15,898,609	\$119,544	446,4461
Gasoline Stations	\$13,287,700	\$32,043,499	\$27,348,444	\$4,695,055	447,4471
Clothing & Clothing Accessories Stores	\$4,333,819	\$9,962,938	\$4,796,861	\$5,166,077	448
Sporting Goods, Hobby, Book & Music Stores	\$3,050,672	\$7,144,419	\$4,290,080	\$2,854,339	451
General Merchandise Stores	\$20,272,397	\$47,662,357	\$142,909,078	-\$95,246,721	452
Food Services & Drinking Places	\$10,852,656	\$25,168,073	\$14,242,339	\$10,925,734	722
Total Demand	\$121,925,831	\$291,546,483	\$347,036,157	-\$55,489,674	

Source: ESRI
Refer to Appendix E for more detailed Demographic Information for Moberly.

ACTUAL SALES EXPENDITURES-MOBERLY/RANDOLPH COUNTY

In addition to the retail potential supply/demand, it is important to examine the Taxable Sales of the Trade Area to gain a clear understanding of the actual expenditures. As opposed to the supply/demand numbers which are estimates based on consumer spending, Taxable Sales reflects the actual expenditures of consumers for a given year.

The table below reflects a selection of Taxable Sales for Moberly and Randolph County by NAICS Subsector for 2018 as reported by the MO Department of Revenue.

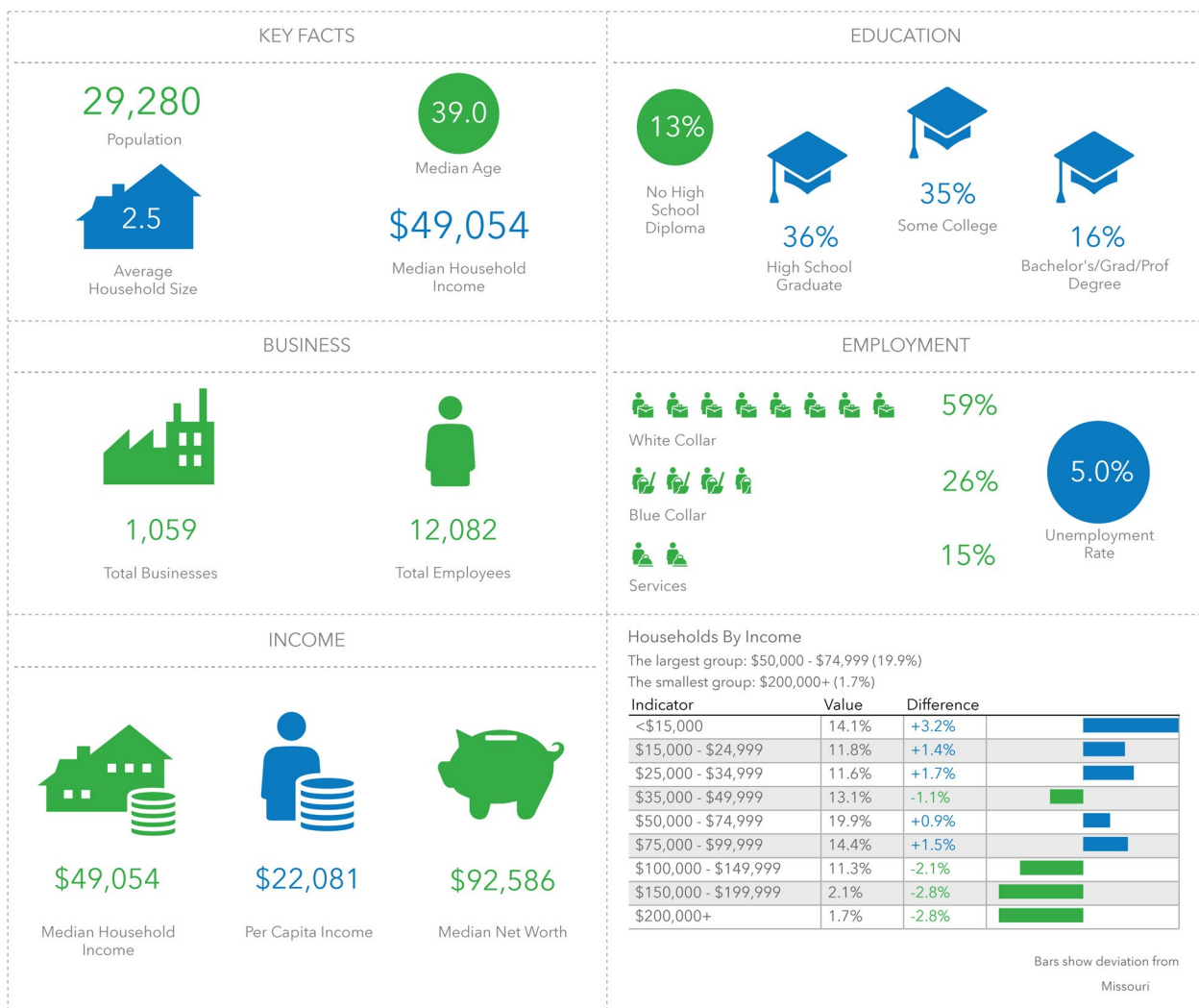
MOBERLY STATE TAXABLE SALES BY NAICS SUBSECTOR 2018			
NAICS Subsector	Description	Moberly	Randolph County
441	Motor Vehicle and Parts Dealers	\$5,385,872	\$6,863,498
442	Furniture and Home Furnishings Stores	\$4,438,386	\$4,756,972
443	Electronics and Appliance Stores	\$823,382	\$1,080,696
444	Building Material and Garden Equipment and Supplies Dealers	\$26,082,119	\$27,803,487
445	Food and Beverage Stores	\$18,666,441	\$20,215,500
446	Health and Personal Care Stores	\$545,880	\$711,958
447	Gasoline Stations	\$10,026,850	\$13,821,522
448	Clothing and Clothing Accessories Stores	\$4,213,375	\$4,505,312
451	Sporting Goods, Hobby, Musical Instrument, and Book Stores	\$1,591,076	\$2,130,336
452	General Merchandise Stores	\$6,836,547	\$8,432,620
453	Miscellaneous Store Retailers	\$3,582,543	\$4,667,680
454	Nonstore Retailers	\$2,917,519	\$4,084,265
722	Food Services and Drinking Places	\$25,027,720	\$26,132,169
Total	Total for ALL Sales	\$141,839,582	\$200,778,029

Source: Missouri Department of Revenue

The table below shows communities comparable to Moberly in population. In addition, the table reflects the total retail sales and per capita sales for each community. The table indicates that Moberly compares favorably to other communities of similar size in terms of total retail sales and suggests that the trade area is larger than the city alone.

COMPARABLE COMMUNITIES PER CAPITA SALE (2017)			
COMMUNITY	POPULATION	RETAIL SALES	PER CAPITA SALES
GRAIN VALLEY	13,480	\$74,801,162	\$5,549
DARDENNE PRAIRIE	12,938	\$106,448,801	\$8,228
MARSHALL	12,865	\$163,576,431	\$12,715
CARTHAGE	14,280	\$231,191,277	\$16,190
MOBERLY	13,775	\$250,136,591	\$18,159
LEBANON	14,610	\$353,342,786	\$24,185
WASHINGTON	13,963	\$461,289,998	\$33,037

Source: U.S. Census; Missouri Department of Revenue



SHOPPER VIEWS AND NEEDS

The research conducted through the Community Survey in 2019 provides the basic information required to match the buying habits and needs within the retail trade area. GSG conducted a residential survey among Moberly residents, ages 18 and older. Based on a population size of 10,815 (18+) a sample size of 357 respondents results in a 95% confidence level and a +/-5% margin of error. GSG considers the sample size of 357 to be reliable.

The area appears to be represented by a mix of middle aged and middle to upper-middle class households. Most households have two wage earners – have well paying blue or white-collar jobs or own small businesses. With their decent paying jobs, these dual-income couples have fashioned comfortable, often child-centered lifestyles.

Shoppers' buying styles reflect an interest in quality, selection and convenience. While price is important, the lowest price is not the key. They are value driven and are sensitive to competition. However, they are willing to pay for quality and good lifestyle experiences. Since many work out of town, hours and shopping convenience is important. (For more information, see the Appendix for this study.)

MOBERLY SALES PROJECTIONS

ASSUMPTIONS:

The Moberly Projections presented in this study are based on the following key assumptions and start with the Missouri Department of Revenue Taxable Sales for 2018:

- The sales projections for the sites in this study assume that the stores or stores similar to those targeted will occupy the site.
- The sales projections further assume retailers will be typical in operations and merchandising as their newer units.
- The sales projections further assume the Site Development Plan provides for an attractive designed retail corridor with good traffic flows and ingress and egress into the sites and parking areas. It further assumes small strip centers which would accommodate smaller specialty retailers and service operations. Large signs readily visible from all directions is also recommended.
- The projections assume a 5% increase in taxable sales each year as well as a minimal population decrease of 0.27% annually over 5 years (2018-2022 estimated).
- Of the total construction for the retail sites, an amount of 100,000 to 150,000 square feet is dedicated to Retail, subject to the Missouri Sales Tax.
- Finally the projections assume a stable and growing regional, state and national economy.

MOBERLY PROJECTIONS

These projections are based on conservative estimates and further based on other market influences in the Moberly Greater Market Area. The background information in the demographics Appendix of local views and needs and actual sales trends from the Missouri Department of Revenue can be utilized for further due diligence on an individual level.

MOBERLY SALES PROJECTIONS						
Factor	2017	2018	2019	2020	2021	2022
Moberly Actual/ Potential	\$100,054,636	\$105,057,368	\$110,310,237	\$115,825,748	\$121,617,036	\$127,697,888
Per Capita Sales	\$7,263	\$7,647	\$8,051	\$8,477	\$8,925	\$9,396
Gap Sales Leakage	-\$150,081,955	-\$157,586,052	-\$165,465,355	-\$173,738,623	-\$182,425,554	-\$191,546,832
Population**	\$13,775	\$13,738	\$13,701	\$13,664	\$13,627	\$13,590
Gap Sales Leakage %	40%	40%	40%	40%	40%	40%
Taxable Sales % Inc.	Base	5%	5%	5%	5%	5%
Retail Total Sales Potential*	\$250,136,591	\$262,643,421	\$275,775,592	\$289,564,371	\$304,042,590	\$319,244,719
Per Capita Potential	\$18,159	\$19,118	\$20,129	\$21,192	\$22,312	\$23,491

*2017 Missouri Department of Revenue Actual Sales

**Population forecasts derived from 2013-2017 Census American Community Survey

VI. TARGETED RETAILERS, RESTAURANTS & SERVICES

OVERVIEW AND TARGET CANDIDATE MATCH

Growth Services assessed hundreds of retailers, restaurants and service providers to determine those with products, services and market acceptance that best match the buying habits and demographics within the site's trade area. Initially, numerous matches occurred from our examination and acknowledgement of the area of Moberly, Missouri as a potential attractive location for retailers, restaurants and service providers.

The initial list was narrowed to approximately 20 targets based upon additional research of each provider. Factors included relative match considerations, business strategies and conditions, community considerations (consumer views and needs and market gaps) and proximity to existing locations. The sites visibility and accessibility to Highways 24 and 63 and the 15,000 plus ADT, while an influence for decision makers, is only a moderate consideration for this plan.

Finally, Growth Services, and City of Moberly met to review and discuss the proposed targets in order to make a final selection of target providers for which the developer can determine and conduct a marketing campaign. Factors considered in this final step included overall desirability, community preferences, the potential tenant mix and other issues specific to the developer's and the City of Moberly's goals and objectives.

TARGETED CANDIDATES		
RESTAURANTS	CLASSIFICATION	LOCATIONS ESTIMATE
Texas Roadhouse	Steakhouse	563
Applebee's	Casual Dining	1,830
Golden Corral	Buffet Casual Dining	498
Olive Garden	Italian Casual Dining	892
Dairy Queen	Fast Food	6,400
RETAILERS	CLASSIFICATION	LOCATIONS ESTIMATE
Target	General Merchandise	1,851
Hy-Vee	Grocery	245
JC Penney	Clothing & Home Goods	864
Kohl's	Clothing & Home Goods	1,158
Hobby Lobby	Craft Store	850
SERVICES	CLASSIFICATION	LOCATIONS ESTIMATE
Pet Smart/Petco	Pet Supplies	1,500 each
Uber/Lyft	Ride Hailing Service	
Safelite Auto Glass	Auto Glass Repair	720
FedEx Office	Office Print & Ship Services	2,000
Sally Beauty	Hair, Nail, and Beauty Supplies	4,800

MOBERLY, MO RETAIL MARKET STUDY

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MOBERLY DEVELOPMENT PREFERENCES

INTRODUCTION AND METHODOLOGY

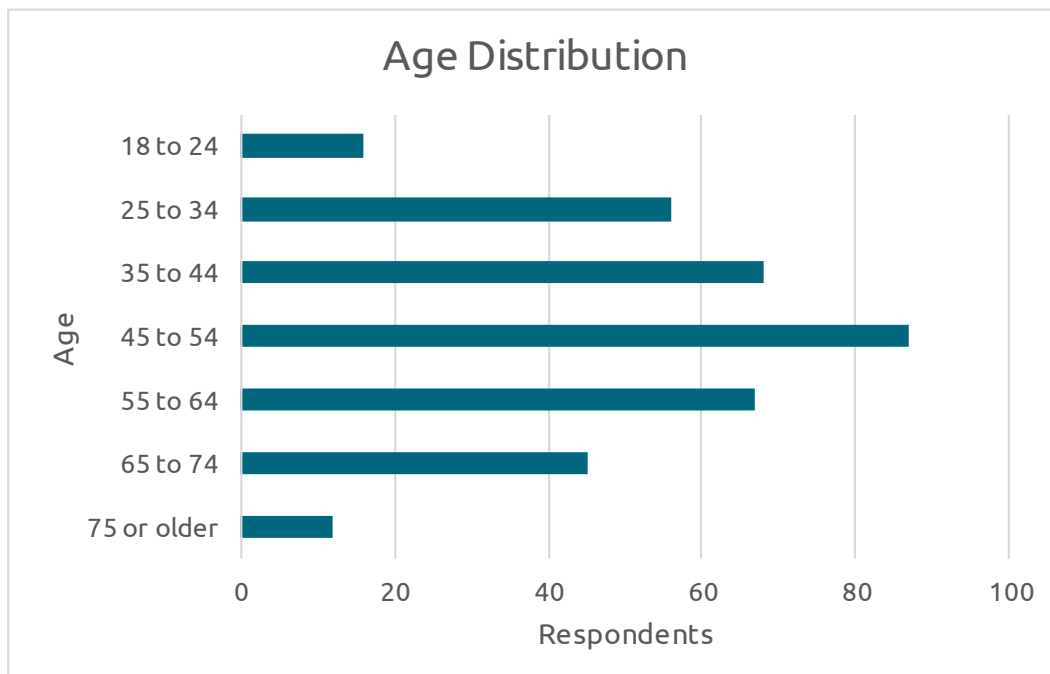
In the Spring of 2019, the City of Moberly conducted a Community Survey. The study encompassed an area comprised primarily of Moberly residents. An electronic survey link was distributed through local utility bills, local partner social media outlets, and hard copies were available at City Hall.

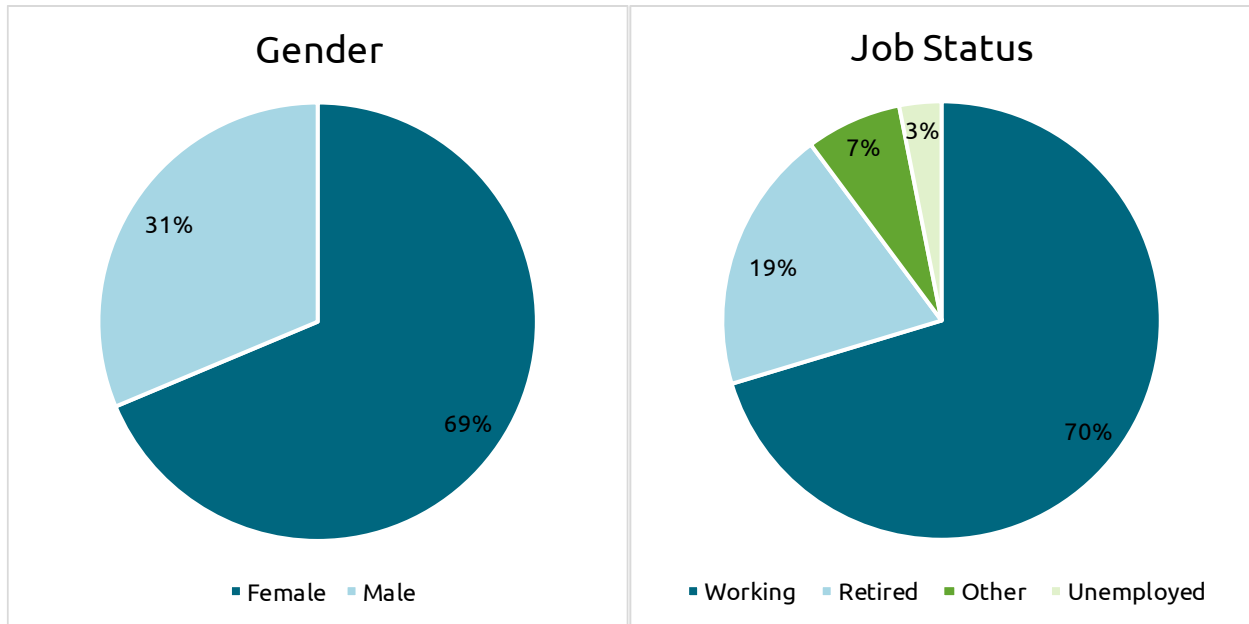
The data utilized for this study is from the development area of the survey consisting of: Business, Housing and Economic Development. This portion will provide the information important for commercial and economic growth. This information, as part of the overall Retail Market Study, will be helpful for planners, developers, and marketers in evaluating opportunities for the expansion of retail and service trade in Moberly, Missouri.

GSG conducted a residential survey among Moberly residents from age 18 and older. Based on a population size of 10,815 (18+) a sample size of 357 respondents results in a 95% confidence level and a +/-5% margin of error. GSG considers the sample size of 357 to be reliable.

The key respondent demographics are as follows:

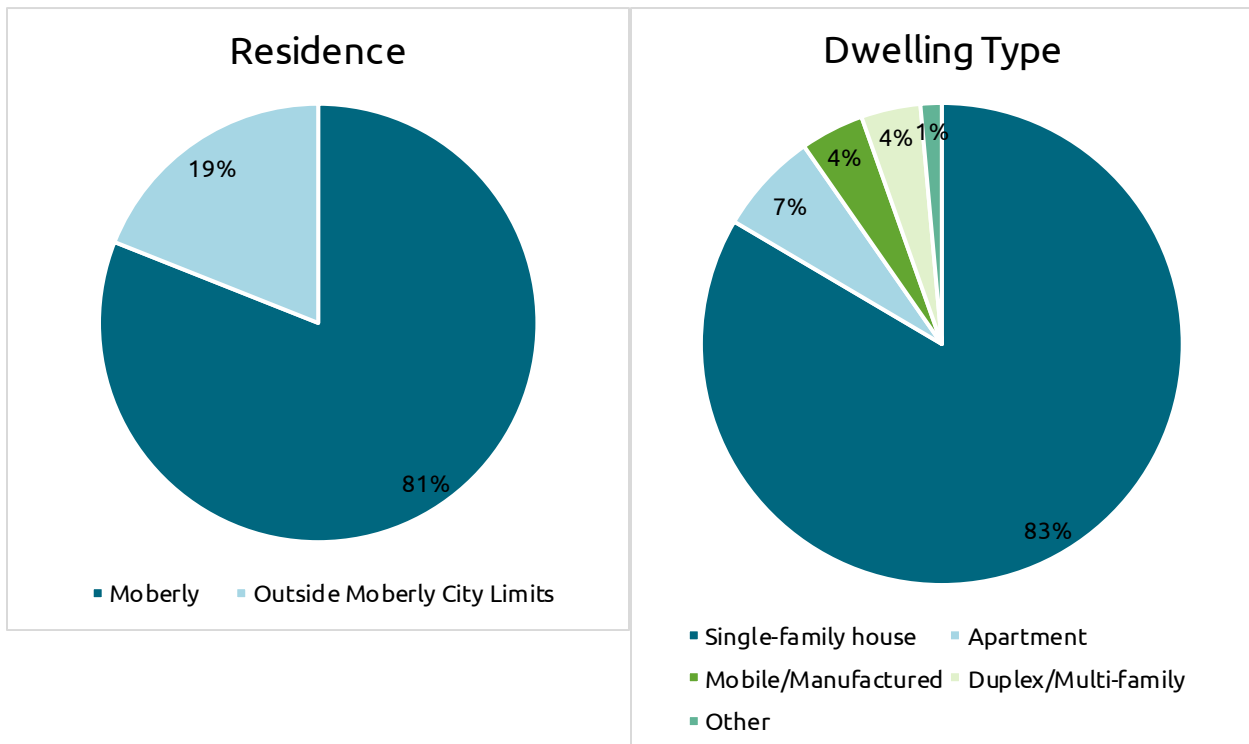
- Average age of the respondents: 49 years
- Respondents: Female 69% and Male 31%
- Job Status: Working 70%, Retired 19%, Other 7%, and 3% Unemployed
- 81% reside inside the Moberly City limits
- 83% live in single-family dwellings
- Occupations are highest in Healthcare, Education, and Financial
- HH incomes are higher than average with 33% earning over \$75,000 yearly



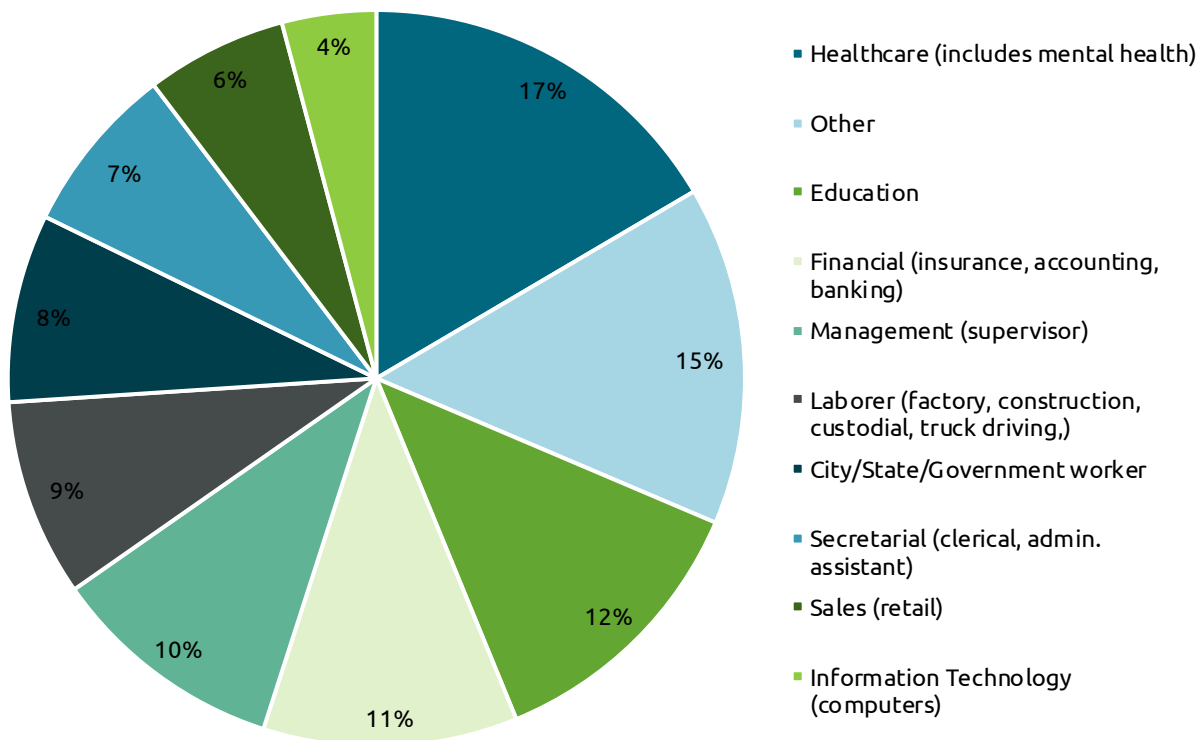


COMMENTS

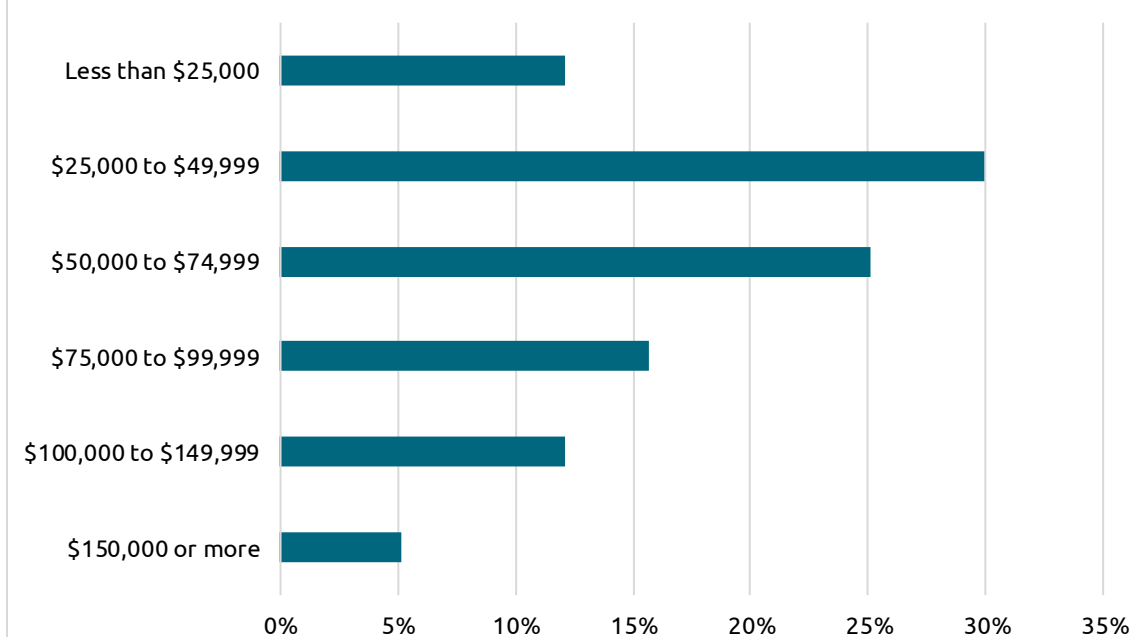
These demographic charts reflect the mix of the respondents by **Age, Gender, Job Status, Location, Housing, Occupation, and Income**. While the sample size and survey are considered reliable and within a margin of error of +/- 5% ,it is important to note that the information derived for this report could well be slightly different if the mix of respondents were different. The survey demographics tend to reflect an older population, with a higher retirement, a higher gender difference and a higher housing mix than the 2017 Census data. This may skew development and shopping preferences to some degree but not significantly. Where possible, GSG has accounted for these variations to further improve the reliability of the survey results.



Occupation Distribution



Income Distribution



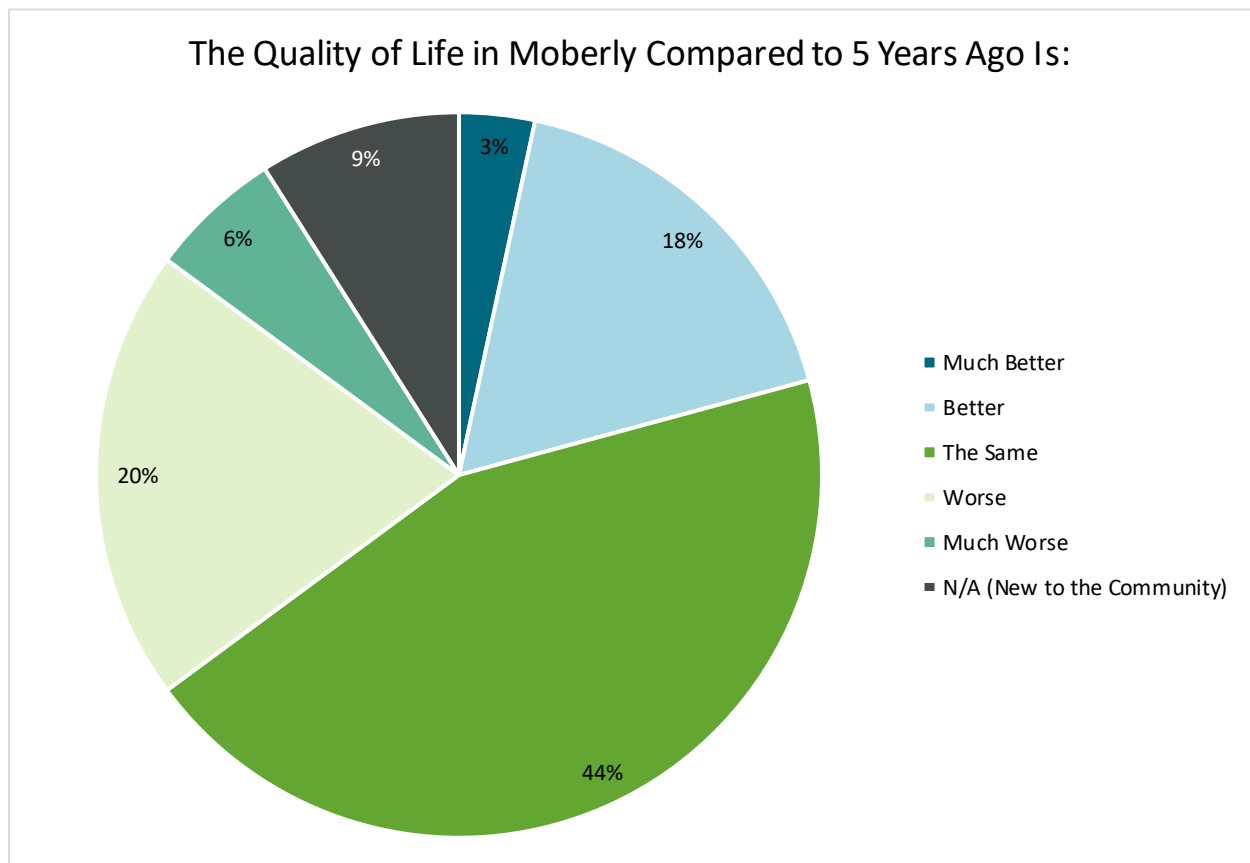
DEVELOPMENT PREFERENCES OF AREA RESIDENTS

QUALITY OF LIFE

The quality of life element for livability ranked high. 67% of respondents rank the quality of life in Moberly the same (46%), better (19) or much better (3%) than it was 5 years ago. 51% or residents indicate that Moberly is a good (40%) or very good (11%) place to live.

One consistent theme among the comments was the desire for additional quality employment opportunities for residents.

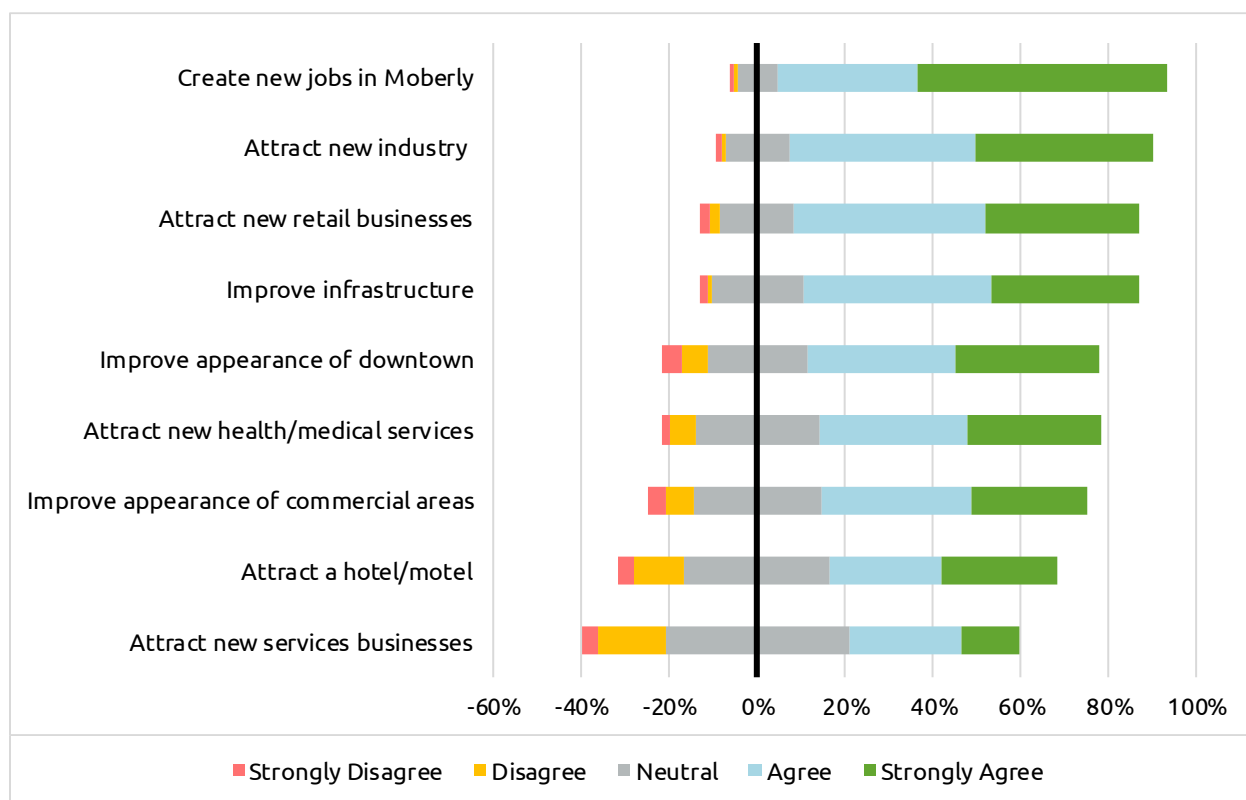
THE QUALITY OF MOBERLY AS A PLACE ...					
	Very Good	Good	Ok	Poor	Very Poor
To live is	11%	40%	37%	9%	3%
To raise children is	10%	36%	34%	14%	5%
To retire is	8%	27%	41%	18%	6%
To work is	6%	28%	36%	22%	7%



BUSINESS DEVELOPMENT PRIORITIES

In the business development area, creation of new jobs ranks number one followed closely by attracting new industry. Attracting new retail businesses and improving infrastructure were also priorities for respondents.

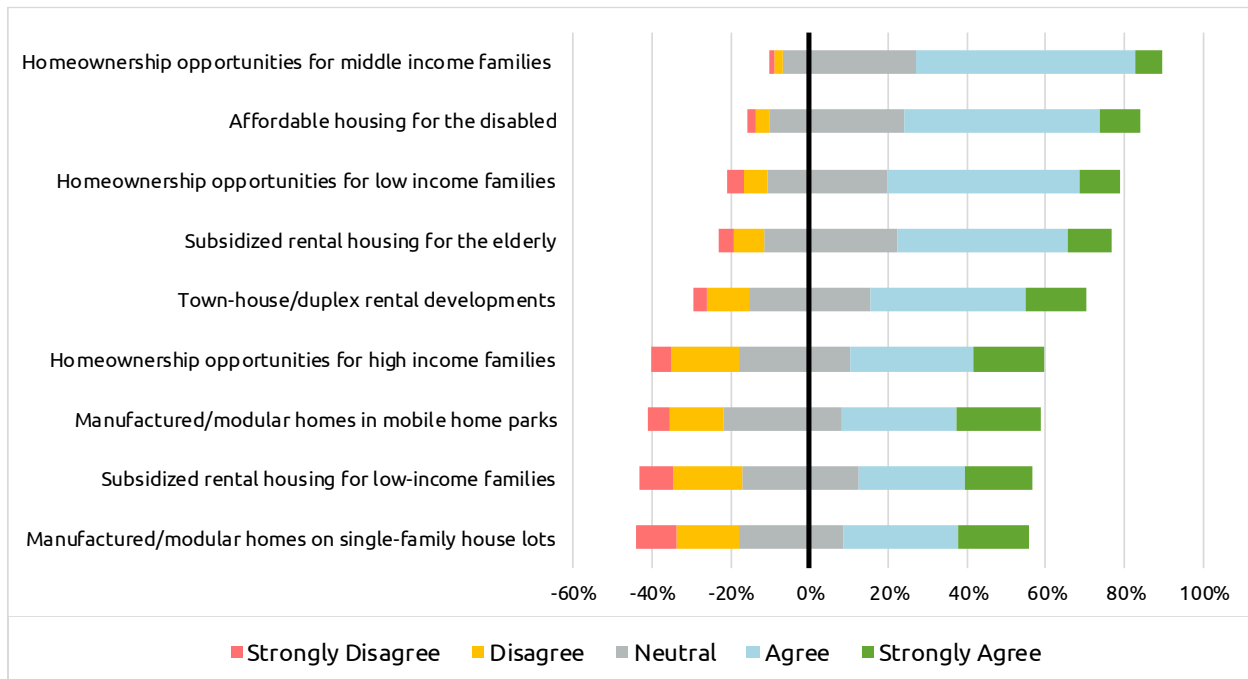
MOBERLY BUSINESS DEVELOPMENT PRIORITIES					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Create new jobs in Moberly	57%	32%	9%	1%	1%
Attract new industry	41%	43%	14%	1%	1%
Attract new retail businesses	35%	43%	17%	2%	2%
Improve Infrastructure	34%	43%	21%	1%	1%
Improve appearance of downtown	33%	34%	23%	6%	4%
Attract new health/medical services	31%	34%	28%	6%	1%
Improve appearance of commercial areas	26%	34%	29%	6%	4%
Attract a hotel/motel	27%	25%	33%	12%	3%
Attract new services businesses	13%	26%	42%	16%	4%



HOUSING DEVELOPMENT PRIORITIES

The housing priorities indicate a strong middle class. Manufactured homes for both mobile parks and single family lots along with subsidized rental housing for low-income families rank the lowest. Homeownership opportunities for middle and low income families received strong agreement in addition to affordable house for the disabled.

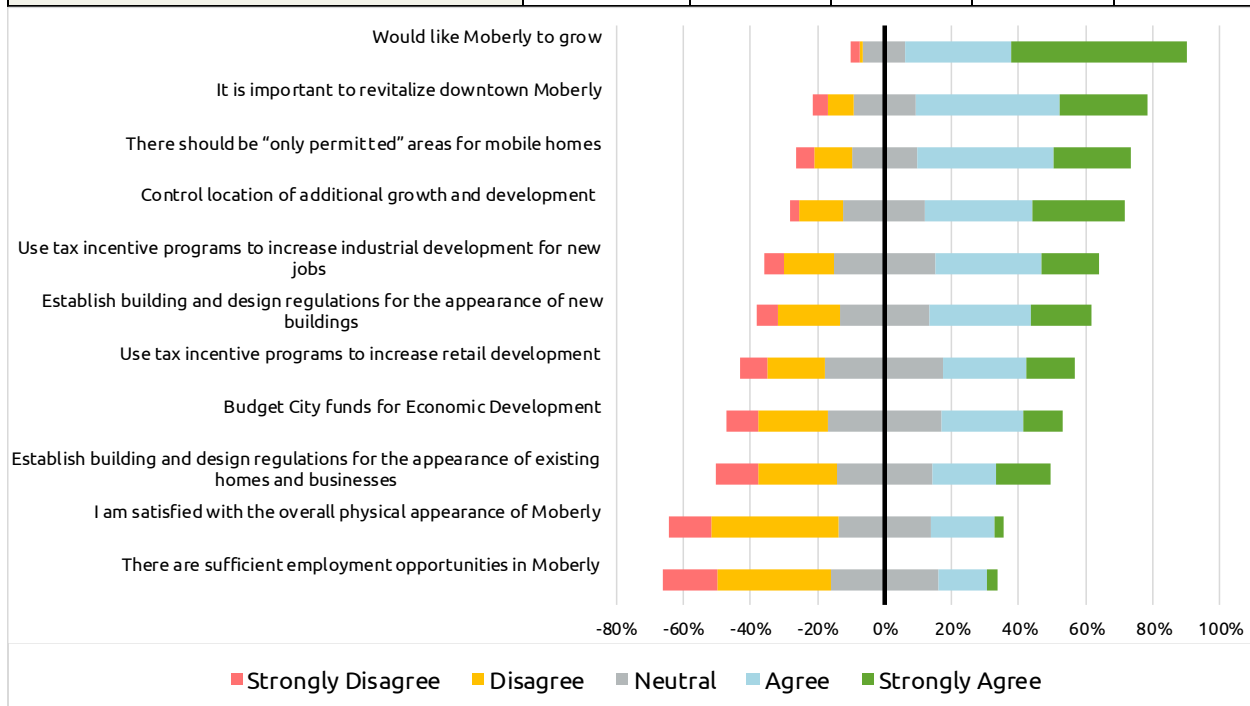
MOBERLY HOUSING DEVELOPMENT PRIORITIES					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Manufactured/modular homes on single-family house lots	9%	29%	36%	16%	10%
Subsidized rental housing for low-income families	12%	27%	34%	18%	9%
Manufactured/modular homes in mobile home parks	8%	29%	43%	14%	6%
Homeownership opportunities for high income families	10%	31%	36%	17%	5%
Town-house/duplex rental developments	15%	40%	21%	11%	3%
Subsidized rental housing for the elderly	22%	43%	23%	8%	4%
Homeownership opportunities for low income families	20%	49%	21%	6%	4%
Affordable housing for the disabled	24%	50%	21%	3%	2%
Homeownership opportunities for middle income families	27%	56%	14%	2%	1%



ECONOMIC DEVELOPMENT PREFERENCES

While new retail and jobs are important, an orderly and controlled growth is important for Moberly as well. Only 18% of respondents felt employment opportunities in Moberly were sufficient. Growing the city is a priority with over 84% in favor.

MOBERLY ECONOMIC DEVELOPMENT PREFERENCES					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Would like Moberly to grow	52%	32%	13%	1%	3%
It is important to revitalize downtown Moberly	26%	43%	19%	8%	5%
There should be "only permitted" areas for mobile homes	23%	41%	19%	11%	5%
Control location of additional growth and development	28%	32%	24%	13%	3%
Use tax incentive programs to increase industrial development for new jobs	17%	32%	30%	15%	6%
Establish building and design regulations for the appearance of new buildings	18%	30%	27%	18%	7%
Use tax incentive programs to increase retail development	15%	24%	35%	17%	8%
Budget City funds for Economic Development	12%	24%	34%	20%	9%
Establish building and design regulations for the appearance of existing homes and businesses	16%	19%	28%	24%	13%
I am satisfied with the overall physical appearance of Moberly	3%	19%	27%	38%	13%
There are sufficient employment opportunities in Moberly	3%	15%	32%	34%	16%



SHOPPING PREFERENCES OF AREA RESIDENTS

LOCATION OF RETAIL PROVIDERS

The survey indicates that if the retail opportunities are available, local shopping will occur. Over 94% purchase gas and 92% groceries in Moberly. The low shopping incidence occurs where there is no provider or the selection and prices are perceived to be better out of town.

MOBERLY SHOPPING PREFERENCES—WHERE WE SHOP NOW				
	Moberly	Out of Town	Online	Don't Purchase
Groceries	92%	7%	1%	0%
Gas	94%	5%	0%	0%
Prescription Drugs	76%	7%	6%	11%
Automobiles	31%	50%	2%	17%
Auto Repair	72%	19%	1%	7%
Tires	76%	17%	4%	4%
Hardware	87%	9%	1%	4%
Lawn/Garden Plants	78%	12%	1%	9%
Lumber	59%	13%	0%	28%
Home Interior Accessories	51%	27%	12%	11%
Computer Products	25%	24%	41%	10%
Restaurant	62%	35%	0%	2%
Newspaper	14%	6%	5%	75%

LOCATION OF SERVICE PROVIDERS

Banking is well represented in the community with 79% banking in town. Service Areas with large out-of-town or online utilization are: Doctors (43%), Insurance (39%), and Accounting/Taxes (37%).

MOBERLY SERVICES LOCATION & PREFERENCES				
	Moberly	Out of Town	Online	Don't Purchase
Attorney	21%	18%	1%	59%
Banking	79%	15%	4%	1%
Computer Services	29%	16%	9%	46%
Accounting/Taxes	43%	16%	20%	21%
Financial Advisor	19%	16%	4%	62%
Insurance	60%	25%	14%	1%
Daycare	14%	3%	0%	83%
Florist	52%	3%	4%	40%
Barber	46%	12%	0%	43%
Hair Stylist	57%	9%	0%	34%
Building Contractor	29%	14%	0%	56%
Electrician	45%	8%	0%	46%
Painter	27%	8%	0%	65%
Plumber	57%	7%	0%	36%
Interior Decorator	4%	6%	0%	90%
Realtor	52%	4%	0%	44%
Doctor	50%	43%	1%	7%
Veterinarian	60%	7%	0%	33%
Movie Rental	21%	3%	18%	58%
Self Storage	13%	3%	0%	85%

RETAIL RANKINGS: CONVENIENCE, SELECTION AND PRICING

Price, Selection, Quality, and Convenience are all important considerations for retail shoppers. Convenience and Selection tend to display an inverse correlation, often ranking opposite in importance. Tires, Automobiles, and Gas are the most price sensitive categories.

SHOPPING CONSIDERATIONS FOR RETAIL BY CATEGORY							
Goods/Services	Price	Selection	Quality	Convenience	Store Hours	Unavailable Locally	Other
Gas	35%	7%	18%	35%	0%	0%	4%
Lumber	28%	20%	34%	14%	0%	1%	3%
Tires	60%	13%	17%	4%	0%	3%	4%
Prescription Drugs	31%	3%	8%	20%	2%	4%	32%
Automobiles	40%	35%	5%	1%	0%	9%	11%
Groceries	28%	21%	45%	2%	0%	4%	0%
Hardware	31%	28%	24%	13%	0%	4%	0%
Auto Repair	26%	4%	30%	13%	4%	9%	14%
Computer Products	33%	27%	9%	15%	1%	11%	4%
Home Interior Accessories	16%	56%	7%	9%	0%	10%	3%
Lawn/Garden Plants	20%	36%	27%	4%	0%	11%	2%
Restaurant	0%	52%	28%	3%	0%	13%	4%
Newspaper	5%	13%	51%	27%	0%	2%	1%

Ranking by Convenience

- 1 Gas
- 2 Newspaper
- 3 Prescription Drugs
- 4 Computer Products
- 5 Lumber
- 6 Auto Repair
- 7 Hardware
- 8 Home Interior Accessories
- 9 Lawn/Garden Plants
- 10 Tires
- 11 Restaurant
- 12 Groceries
- 13 Automobiles

Ranking by Selection

- 1 Home Interior Accessories
- 2 Restaurant
- 3 Lawn/Garden Plants
- 4 Automobiles
- 5 Hardware
- 6 Computer Products
- 7 Groceries
- 8 Lumber
- 9 Tires
- 10 Newspaper
- 11 Gas
- 12 Auto Repair
- 13 Prescription Drugs

Ranking by Price

- 1 Tires
- 2 Automobiles
- 3 Gas
- 4 Computer Products
- 5 Prescription Drugs
- 6 Hardware
- 7 Groceries
- 8 Lumber
- 9 Auto Repair
- 10 Lawn/Garden Plants
- 11 Home Interior Accessories
- 12 Newspaper
- 13 Restaurant

SERVICE RANKINGS: CONVENIENCE, SELECTION AND PRICING

In the Services market, quality is an important consideration for Interior Decorators, Realtors, Veterinarians, and Doctors. Store Hours do not rank significantly for any service. Quality is the most important factor for Day Care. For a Insurance, Price has the highest ranking.

SHOPPING CONSIDERATIONS FOR SERVICES BY CATEGORY							
Goods/Services	Price	Selection	Quality	Convenience	Store Hours	Unavailable Locally	Other
Accounting/Taxes	14%	6%	17%	39%	0%	2%	22%
Attorney	2%	26%	44%	7%	0%	9%	13%
Banking	4%	12%	17%	35%	5%	10%	17%
Barber	7%	3%	33%	34%	1%	0%	23%
Building Contractor	16%	11%	52%	4%	0%	8%	10%
Computer Services	21%	18%	28%	12%	0%	6%	15%
Day Care	6%	12%	41%	29%	0%	0%	12%
Doctor	0%	16%	57%	4%	0%	8%	15%
Electrician	9%	24%	48%	7%	0%	12%	0%
Financial Advisor	1%	11%	32%	18%	0%	5%	33%
Florist	16%	10%	15%	36%	0%	10%	14%
Hair Stylist	9%	8%	48%	11%	6%	5%	14%
Insurance	34%	10%	9%	12%	0%	4%	32%
Interior Decorator	2%	7%	71%	7%	0%	13%	0%
Movie Rental	5%	22%	5%	56%	0%	9%	2%
Painter	8%	13%	52%	10%	0%	14%	2%
Plumber	22%	10%	43%	14%	3%	2%	6%
Realtor	12%	0%	60%	7%	0%	0%	21%
Self-Storage	6%	8%	39%	0%	0%	23%	24%
Veterinarian	23%	2%	59%	0%	0%	0%	17%

Ranking by Convenience	
1	Movie Rental
2	Accounting/Taxes
3	Florist
4	Banking
5	Barber
6	Day Care
7	Financial Advisor
8	Plumber
9	Insurance
10	Computer Services
11	Hair Stylist
12	Painter
13	Attorney
14	Realtor
15	Electrician
16	Interior Decorator
17	Doctor
18	Building Contractor
19	Self-Storage
20	Veterinarian

Ranking by Selection	
1	Attorney
2	Electrician
3	Movie Rental
4	Computer Services
5	Doctor
6	Painter
7	Day Care
8	Banking
9	Financial Advisor
10	Building Contractor
11	Plumber
12	Florist
13	Insurance
14	Hair Stylist
15	Self-Storage
16	Interior Decorator
17	Accounting/Taxes
18	Barber
19	Veterinarian
20	Realtor

Ranking by Price	
1	Insurance
2	Veterinarian
3	Plumber
4	Computer Services
5	Florist
6	Building Contractor
7	Accounting/Taxes
8	Realtor
9	Electrician
10	Hair Stylist
11	Painter
12	Barber
13	Day Care
14	Self-Storage
15	Movie Rental
16	Banking
17	Interior Decorator
18	Attorney
19	Financial Advisor
20	Doctor

COMMERCIAL DEVELOPMENT WISH LIST

Respondents were asked to identify up to 3 businesses they would patronize if they were located in Moberly. In addition, respondents were asked to rank their top three choices. The table below details the commercial development wish list for respondents with Casual Dining ranking number one overall.

MOBERLY COMMERCIAL DEVELOPMENT WISH LIST			
	Overall Rank	Score	# of Rankings
Casual Dining	1	601	241
General Merchandise	2	355	180
Sandwich Shop	3	187	99
Yogurt/Ice Cream Shop	4	121	66
Electronics Store	5	108	61
Sporting Goods	6	101	54
Coffee Shop	7	87	48
Shipping Drop Off Point	8	83	45
Hunting Supply Store	9	73	34
Furniture Store	10	57	36
Appliance Store	11	52	28
Farm Supply Store	12	40	23
Drive up Oil Change	13	39	20
Taxi Service	14	32	16
Dry Cleaners	15	22	12
Tire Sales	16	20	13
Paint Supply	17	8	5

IMPORTANCE OF SHOPPING CONSIDERATIONS

Quality Merchandise receives the highest overall ranking when making a shopping location decision followed very closely by Customer Service. Entertainment ranked relatively low overall with a significant number of respondents indicating that it was not important at all.

IMPORTANCE OF SHOPPING CONSIDERATIONS			
Shopping	Very Important	Somewhat Important	Not Important at All
Quality Merchandise	93%	7%	0%
Good Customer Service/Friendliness	91%	9%	1%
Safety/Security	83%	15%	2%
Low Prices or Good Value	76%	23%	1%
Variety of Stores/Merchandise	74%	25%	1%
Attractive Decor/Cleanliness	73%	25%	2%
Quick & Easy to Shop	71%	27%	1%
Restaurants you Like	71%	23%	7%
Parking & Accessibility	64%	33%	3%
Hours of Operation	60%	38%	2%
Entertainment & Events	42%	42%	16%

THE MOST IMPORTANT CONSIDERATION

When asked to select only one of the eleven considerations for shopping, Variety of Stores/Merchandise ranked number one; Low Prices/Good Value ranked second; and Quality Merchandise ranked third with Entertainment & Events ranking at the bottom.

MOST IMPORTANT ATTRIBUTES			
Shopping	Overall Rank	Percent	# of Rankings
Variety of Stores/Merchandise	1	30%	107
Low Prices or Good Value	2	27%	95
Quality Merchandise	3	16%	57
Good Customer Service/Friendliness	4	10%	37
Restaurants you Like	5	5%	18
Safety/Security	6	3%	11
Hours of Operation	7	3%	10
Parking & Accessibility	8	3%	9
Quick & Easy to Shop	9	2%	8
Attractive Decor/Cleanliness	10	1%	3
Entertainment & Events	11	1%	2

SHOPPING OUTSIDE MOBERLY

Almost all respondents indicated that they traveled to another location in the region for shopping in the last 60 days. Columbia, Missouri received the highest overall rank by a factor of 4 with St. Louis coming in second.

SHOPPING MARKETS VISITED BY RESPONDENTS IN THE LAST 60 DAYS			
Shopping Markets	Overall Rank	Percent	Responses
Stores or shopping in Columbia	1	97%	296
Stores or shopping in St. Louis	2	24%	74
Outlet Mall in Within 200 miles	3	21%	64
Stores or shopping in Kansas City	3	21%	64
Stores or shopping in Liberty	5	4%	12
Stores or shopping in Des Moines, IA	6	2%	6
Stores or shopping in St. Joseph	7	2%	6

SHOPPING DOLLARS IN MOBERLY

Nearly forty three percent of all area residents in Moberly spend 50% or less of their shopping and entertainment dollars in Moberly. Those who work in Moberly tend to spend more of their dollars in Moberly. Twenty six percent of respondents indicated spending over 75% of their shopping dollars in the city. This indicates a considerable gap in the retail, restaurant, and service options available in Moberly.

PERCENT OF TOTAL SHOPPING AND ENTERTAINMENT DOLLARS SPENT IN MOBERLY			
Shopping	Overall Rank	Percent	Responses
Less than 25%	4	17%	61
25% to 50%	3	26%	92
51% to 75%	1	31%	109
Over 75%	2	26%	94

SATISFACTION OF DINING OPTIONS IN MOBERLY (RESTAURANTS)

The satisfaction rating of existing dining options includes over 54% of respondents dissatisfied (38.8%) or very dissatisfied (15.5%). This indicates a considerable gap in the availability of desired dining establishments in Moberly.

SATISFACTION WITH DINING AND RESTAURANT OPTIONS IN MOBERLY			
Dining/Restaurant Options	Overall Rank	Percent	Responses
Very Dissatisfied	3	16%	54
Dissatisfied	1	39%	135
Neutral	2	28%	96
Satisfied	3	16%	54
Very Satisfied	5	3%	9

SATISFACTION OF SHOPPING OPTIONS IN MOBERLY (RETAIL STORES)

The neutral rating of existing retail shopping options for Moberly received the highest ranking from respondents followed by dissatisfied. This satisfaction rating coupled with the number of respondents who indicated they have shopped outside the market in the last 60 days further confirms retail opportunities in the market.

SATISFACTION WITH RETAIL OPTIONS IN MOBERLY			
Retail Options	Overall Rank	Percent	Responses
Very Dissatisfied	4	9%	30
Dissatisfied	2	32%	112
Neutral	1	38%	131
Satisfied	3	22%	75
Very Satisfied	5	0%	1

SATISFACTION OF SERVICE OPTIONS IN MOBERLY (RETAIL STORES)

The overall rating of existing services option showed 82% of respondents neutral or satisfied with the services available in Moberly. 18% of respondents are dissatisfied with the current options.

SATISFACTION WITH SERVICES OPTIONS IN MOBERLY			
Retail Options	Overall Rank	Percent	Responses
Very Dissatisfied	5	3%	11
Dissatisfied	3	15%	53
Neutral	1	44%	155
Satisfied	2	33%	117
Very Satisfied	4	4%	14

SHOPPING FREQUENCY

This area indicates a steady support for local businesses which is consistent with the tapestry segments for Moberly. 20% of respondents indicated they are shopping less often in Moberly which further demonstrates the need for additional retailers entering the market.

SHOPPING FREQUENCY IN MOBERLY VS 1-YEAR PRIOR			
Shopping Frequency	Overall Rank	Percent	Responses
More Often	3	12%	42
About the Same	1	68%	235
Less Often	2	20%	71

WHY SHOPPING MORE OFTEN

For those who answered “more often” to the previous question, Time and Convenience ranked the highest, followed by Community Support and Loyalty. At this time, Saving Energy and Costs ranked the lowest. Write in comments included just moving to the area and lifestyle changes.

IF MORE OFTEN; WHY?			
Shopping Frequency; Why?	Overall Rank	Percent	Responses
Store & Merchandise Selection	4	19%	8
Time & Convenience	1	50%	21
Save Energy & Final Cost	5	10%	4
Community Support & Loyalty	2	43%	18
Other (write-in)	3	24%	10

DETAILED PREFERENCES RESPONSE SUMMARY

Respondents were asked to provide three names or types of restaurants, retail stores, and services that they would like to see added to the Moberly, Missouri area. Responses were reviewed, aggregated, and summarized to create detailed insights into consumer desires in the area. The following three pages include respondent answers by specific name (when provided) or type.

Dining/Restaurant Preferences

In general, respondents expressed a desire for a casual dining option such as Applebee's, Chili's, or Cheddar's; a steakhouse; and a greater variety of fast food options in Moberly. GSG recommended Texas Roadhouse, Applebee's, and Dairy Queen, among others, to meet these preferences.

When asked, "How often would you patronize one or more of your three restaurant choices?" 54 percent stated they would visit one of their choices at least weekly, 96 percent would patronize one of their choices at least monthly.

STATED FREQUENCY OF VISITS TO TOP CHOICES		
Restaurants	Percent	Responses
Multiple times per week	21%	71
Weekly	34%	115
Multiple times per month	30%	103
Monthly	12%	40
Once every two months	3%	9
A couple of times a year or less	2%	5

Shopping/Retail Preferences

In general, respondents expressed a desire for a higher end grocery store, a home furnishings/craft store, and more diverse clothing store options. GSG suggested Hy-Vee, JCPenney, and Hobby Lobby as potential options to satisfy this market demand.

When asked, "How often would you patronize one or more of your three store choices?" 43 percent stated they would visit one of their choices at least weekly; 94 percent would patronize one of their choices at least monthly.

STATED FREQUENCY OF VISITS TO TOP CHOICES		
Retail Stores	Percent	Responses
Multiple times per week	18%	55
Weekly	26%	80
Multiple times per month	37%	117
Monthly	13%	42
Once every two months	4%	12
A couple of times a year or less	3%	8

Service Preferences

In general, respondents expressed a desire for home repair/handyman services; pet services; and transportation options. GSG recommended Pet Smart or Petco and Uber or Lyft as services to address some of these stated needs.

Dining/Restaurant Preferences			
Restaurant Name			
Applebee's	74	A.J.'s	5
Wendy's	60	HuHot	5
Dairy Queen	41	Red Robin	5
KFC	40	Waffle House	5
Golden Corral	35	McAllister's Deli	4
Olive Garden	34	Shakespeare's Pizza	4
Texas Roadhouse	33	Starbucks	4
Steak 'n Shake	26	Bandana's BBQ	3
Chili's	20	Dunkin Donuts	3
Cracker Barrel	19	Jack in the Box	3
Chick-fil-A	17	Jersey Mike's	3
IHOP	17	Pancheros	3
Panera Bread	17	Perkins	3
Ruby Tuesday	15	Sub Shop	3
Chipotle	13	White Castle	3
Jimmy John's	13	Zaxby's	3
Long Horn Steak House	13	Bob Evans	2
Colton's Steak House	12	Buffalo Wild Wings	2
Culver's	12	Church's Chicken	2
Denny's	11	Cicis Pizza	2
Cheddar's	9	Godfather's Pizza	2
Popeye's	9	Hooters	2
TGI Friday's	9	In-N-Out Burger	2
Red Lobster	7	Lee's Chicken	2
Five Guys	6	Pear Tree	2
Outback Steakhouse	6	Shoney's	2
Fazoli's	6		
Restaurant Type			
Steak House	45	Specialty Pizza	5
Italian	32	Cafe	4
Family Dining	14	Sushi	4
Seafood	10	BBQ	3
Buffet Style	9	Breakfast places	3
Thai	9	Chinese	3
Upscale	9	Indian	3
American	8	Pasta	3
Healthy food	8	Vegetarian	3
Brewery restaurant	7	Asian Cuisine	2
Home style	7	Cajun	2
24-Hour Restaurant	5	Diner	2
Chicken	5	Irish/German	2
Coffee Shop	5	Sandwich shop	2
Mexican	5		

Shopping/Retail Preferences					
Store Name					
Target	78	Pier One	4	Victoria Secret	2
Hy-Vee	57	Schnucks	4	Banana republic	1
JCPenny	39	Trader Joe's	4	Buchheits	1
Kohl's	35	Bass Pro/Cabelas	3	Charming Charlie	1
Marshall's	29	Bed Bath and Beyond	3	CVS	1
Hobby Lobby	23	Costco	3	Fred Meyers	1
Old Navy	17	Five below	3	Gordmans	1
Home Goods	15	Krogers	3	Harbor Freight	1
Ross Dress for Less	12	Sears	3	Hastings	1
BEST BUY	10	Shoe Carnival	3	Ink Factory	1
Gerbes	8	Torrid	3	Palen Music	1
Menards	8	Amazon Fresh	2	Plato's Closet	1
Academy Sports	7	Avenue	2	Plenty	1
Dick's Sporting Goods	7	Barnes & Noble	2	Roolee	1
K-Mart	7	Ben Franklin	2	Rue 21	1
TJ Maxx	7	Buckle	2	Sallyz	1
Big Lots	6	Carters	2	Save a lot	1
Burlington Coat Factory	6	Chico's	2	Slackers	1
Pet Smart	6	Dress Barn	2	Soma	1
Sam's Club	6	H&M	2	Spencer's	1
American Eagle	5	Home Depot	2	Tradehome	1
Michael's	5	Hot Topic	2	V Stock	1
Bath & Body Works	4	Macy's	2	Verizon	1
Dillard's	4	Payless shoes	2	Viva Fashion Mart	1
Gap	4	Salvation Army	2		
JoAnn's	4	Tuesday Mornings	2		
Store Type					
Men's Clothing	20	Children's clothing	6	Dollar Store	2
Shoe Store	16	Electronics	6	Family clothing	2
Clothing Store	15	Furniture store	6	Garden Center	2
Craft store	13	Farm/Tractor Supply	4	Maternity	2
Grocery store	12	Kids clothing	4	Outlet Stores	2
Pet Store	11	Office Equipment/Supplies	4	Packing/Shipping	2
Specialty Market	10	Automobile Dealers	3	Paint store	2
Women's Clothing	9	Big and Tall Men Clothing	3	Antique Store	1
Bookstore	8	Department Store	3	Bulk stores	1
Plus size women's clothing	8	Liquor Store	3	Mountaineering	1
sporting goods	8	Marijuana Dispensary	3	sports nutrition	1

Service Preferences			
Service Name			
Pet Smart/Petco	3	Merry Maids	1
Uber	3	Sally Beauty	1
Auto Glass Repair/Safelite	1	Steve's Pest Control	1
Boys & Girls Club	1	Trugreen	1
Kinko's	1		
Service Type			
General Home Repair/Handyman	49	Pet Boarding/Sitting	2
Electrician	22	Pet Grooming	2
Plumber	19	Roofing	2
General Contractor	11	Sanitation Services	2
Appliance Repair	10	Senior Services	2
Electronic Repair	10	Shoe Repair	2
Auto Repair	8	Towing	2
Cable/Internet Providers	8	Alternative Medicine	1
Attorney	7	Ambulance Service	1
Doctors	7	Architect	1
Interior decorating	7	Auction House	1
Landscaping	7	Axe Throwing	1
Lawn Care	7	Car Rental	1
Taxi/Transportation	7	Carpenter	1
Doctors (Specialists)	6	Children's Entertainment	1
House Cleaning Services	6	Children's Therapist	1
Accounting	5	Custom Auto Shop	1
Childcare	5	Dance/Cheer Instruction	1
HVAC	5	Dentist	1
Medical Center	5	Diesel repair	1
Asphalt Paving	4	Equipment repair	1
Computer Services	4	Escape Room	1
Dry Cleaners	4	Fencing	1
Home Remodeling	4	Financial Planning	1
Outside Activities/Put Put/Go Carts	4	Flooring	1
Painters	4	Gym	1
Animal Shelter	3	Hydraulic repair	1
Entertainment	3	LAUNDRA MATS	1
Food Delivery (GrubHub/Door Dash)	3	Locksmith	1
Hotel	3	Marketing Company	1
Pest Control	3	Masonry/Mortar Repair	1
Seamstress/Tailor	3	Music instrument repair	1
Veterinary Care	3	Nanny/Baby Sitter Service	1
Auto Detailing	2	Router Rooter	1
Career Center/Education	2	Security Firms	1
Children's Education Assistance	2	Senior Housing	1
Dog Training	2	Small Engine Repair	1
Full Service Car Wash	2	Spa	1
Insurance	2	Street Maintenance	1
Local Banks	2	Swimming Pool Service	1
Massage Therapy	2	Tattoo shops	1
Movie Theatre/IMAX	2	Window washing	1
Music lessons	2	Workout conditioning	1
Nail salon	2		

APPENDIX B

GLOSSARY OF TERMS

ADT: Average Daily Traffic

Barriers: Physical or psychological obstacles that make it more difficult to travel from one area to another.

Cannibalization: A situation in which one retail site attracts (cannibalizes) customers from an existing retail site of the same type retailer, reducing the existing store's customer base and sales. Simply, it is the loss of sales of an existing store when a new store location opens nearby.

Civilian Employment: The employment of all residents living in a county or area and working anywhere (counts people). It counts all people working whether self-employed, as well as job holders. It is reported monthly by Federal and State Labor agencies.

Commuting Patterns: The willingness of people residing in one community or county to travel to another for work. This can also influence shopping patterns and preference.

Demand: The amount spent on a commodity within certain geography in relation to the average amount spent on that commodity.

Float: That portion of the potential within the trade area that is not captured by the identified stores.

Greater Market Area: The geographic area normally designated with a core community or county with a surrounding area within a travel distance 25 to 40 miles or minutes for shopping or recreation.

Industry Employment: The employment of all workers working in the county and living anywhere (counts jobs). Industry Employment counts only those on a payroll where withholdings are taken from their checks. An individual could be counted twice on Industry Employment if the individual held two jobs. It is reported periodically by Federal and State Labor agencies.

Median Household Income: The income figure within a geographic area where half of the incomes for households are higher and half of the incomes are lower. The income is derived from all sources: wages, pensions, interest and dividend income, etc.

Pull Factor: The net pull of customers from one community or county to another for shopping purposes based on a factor where 1.0 reflects a balance based on population, income, and sales to a state average. A factor above 1.0 indicates a higher retail base than warranted by population and income and less than 1.0 would be the opposite.

Pulling Power: The attraction a store exerts upon the population.

Retail Trade Potential: The estimate of total retail sales that could potentially exist within a geography based on surveys, demographics and retail sales forecasts.

Segmentation: A standardized method of classifying, sorting, and grouping of people or households. An example would be by age such as the YXers, Under 41, Boomers, 41- 59, Seniors and Over 60, or by work location. The segmentation is to distinguish differences in lifestyle patterns, behavior, and purchasing habits of consumers.

Trade Area: The area containing the majority of the population that could contribute to the sales of a store or stores located at a proposed site, is also referred to as the study area.

APPENDIX C

QUALIFIER

In the use of this retail market study, potential users acknowledge that they believe the services performed by Growth Services can be a valuable tool in due-diligence and decision making. They also understand that an important part of said services involves judgment, which is dependent upon the correctness of the information made available to Growth Services and the ever changing market conditions, therefore, potential users further acknowledge their understanding that Growth Services does not guarantee any result from the use of the analysis or other services performed hereunder, nor shall Growth Services be responsible for any loss incurred as a result of the use of said analysis or other services.

Furthermore, these projections are based on the conditions identified in the report at the time of its completion. Any change within the trade area, such as the opening or closing of competitive stores or changes in economic conditions, could cause significant variation between these projections and actual results of individual businesses and/or development area. The supply and demand of retail services constantly change and are subject both to local and outside market forces.

APPENDIX D

SOURCES OF INFORMATION

CITY OFFICES, MOBERLY, MISSOURI

CITY OF MOBERLY, COMMUNITY SURVEY 2019

ESRI—ArcGIS

ON THE MAP

MISSOURI DEPARTMENT OF ECONOMIC DEVELOPMENT, MERIC

MISSOURI DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION

MISSOURI DEPARTMENT OF REVENUE

MISSOURI DEPARTMENT OF TRANSPORTATION

U.S. DEPARTMENT OF COMMERCE, BUREAU OF CENSUS

U.S. DEPARTMENT OF COMMERCE, BUREAU OF ECONOMIC ANALYSIS

U.S. DEPARTMENT OF LABOR, BUREAU OF LABOR STATISTICS

APPENDIX E

ESRI REPORTS

CENSUS PROFILE
ACS POPULATION SUMMARY
BUSINESS SUMMARY
COMMUNITY PROFILE
DETAILED AGE PROFILE
EXECUTIVE SUMMARY
GRAPHIC PROFILE
RETAIL GOODS AND SERVICES EXPEDITURES
RETAIL MARKET POTENTIAL
RETAIL MARKET PLACE PROFILE
TRAFFIC COUNT MAPS

2010 Census Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	2000	2010	2000-2010 Annual Rate
Population	13,622	13,986	0.26%
Households	4,977	4,963	-0.03%
Housing Units	5,796	5,690	-0.18%
Population by Race			
Total		13,986	100.0%
Population Reporting One Race		13,625	97.4%
White		12,088	86.4%
Black		1,357	9.7%
American Indian		49	0.4%
Asian		81	0.6%
Pacific Islander		2	0.0%
Some Other Race		48	0.3%
Population Reporting Two or More Races		361	2.6%
Total Hispanic Population		299	2.1%
Population by Sex			
Male		7,517	53.7%
Female		6,469	46.3%
Population by Age			
Total		13,986	100.0%
Age 0 - 4		902	6.4%
Age 5 - 9		881	6.3%
Age 10 - 14		841	6.0%
Age 15 - 19		839	6.0%
Age 20 - 24		1,144	8.2%
Age 25 - 29		1,184	8.5%
Age 30 - 34		1,077	7.7%
Age 35 - 39		975	7.0%
Age 40 - 44		915	6.5%
Age 45 - 49		1,022	7.3%
Age 50 - 54		879	6.3%
Age 55 - 59		740	5.3%
Age 60 - 64		641	4.6%
Age 65 - 69		478	3.4%
Age 70 - 74		389	2.8%
Age 75 - 79		390	2.8%
Age 80 - 84		310	2.2%
Age 85+		379	2.7%
Age 18+		10,910	78.0%
Age 65+		1,946	13.9%

Data Note: Hispanic population can be of any race. Census 2010 medians are computed from reported data distributions.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri converted Census 2000 data into 2010 geography.

2010 Census Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Households by Type		
Total	4,963	100.0%
Households with 1 Person	1,658	33.4%
Households with 2+ People	3,305	66.6%
Family Households	3,022	60.9%
Husband-wife Families	1,991	40.1%
With Own Children	777	15.7%
Other Family (No Spouse Present)	1,031	20.8%
With Own Children	671	13.5%
Nonfamily Households	283	5.7%
All Households with Children	1,617	32.6%
Multigenerational Households	164	3.3%
Unmarried Partner Households	422	8.5%
Male-female	400	8.1%
Same-sex	22	0.4%
Average Household Size	2.35	
Family Households by Size		
Total	3,022	100.0%
2 People	1,374	45.5%
3 People	679	22.5%
4 People	517	17.1%
5 People	285	9.4%
6 People	119	3.9%
7+ People	48	1.6%
Average Family Size	2.97	
Nonfamily Households by Size		
Total	1,941	100.0%
1 Person	1,658	85.4%
2 People	234	12.1%
3 People	39	2.0%
4 People	9	0.5%
5 People	1	0.1%
6 People	0	0.0%
7+ People	0	0.0%
Average Nonfamily Size	1.18	
Population by Relationship and Household Type		
Total	13,986	100.0%
In Households	11,644	83.3%
In Family Households	9,360	66.9%
Householder	3,022	21.6%
Spouse	1,991	14.2%
Child	3,654	26.1%
Other relative	299	2.1%
Nonrelative	394	2.8%
In Nonfamily Households	2,284	16.3%
In Group Quarters	2,342	16.7%
Institutionalized Population	2,052	14.7%
Noninstitutionalized Population	290	2.1%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography. Average family size excludes nonrelatives.

Source: U.S. Census Bureau, Census 2010 Summary File 1.

2010 Census Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Family Households by Age of Householder		
Total	3,022	100.0%
Householder Age 15 - 44	1,440	47.7%
Householder Age 45 - 54	553	18.3%
Householder Age 55 - 64	472	15.6%
Householder Age 65 - 74	315	10.4%
Householder Age 75+	242	8.0%
Nonfamily Households by Age of Householder		
Total	1,941	100.0%
Householder Age 15 - 44	537	27.7%
Householder Age 45 - 54	343	17.7%
Householder Age 55 - 64	332	17.1%
Householder Age 65 - 74	237	12.2%
Householder Age 75+	492	25.3%
Households by Race of Householder		
Total	4,963	100.0%
Householder is White Alone	4,520	91.1%
Householder is Black Alone	332	6.7%
Householder is American Indian Alone	13	0.3%
Householder is Asian Alone	23	0.5%
Householder is Pacific Islander Alone	0	0.0%
Householder is Some Other Race Alone	14	0.3%
Householder is Two or More Races	61	1.2%
Households with Hispanic Householder	70	1.4%
Husband-wife Families by Race of Householder		
Total	1,991	100.0%
Householder is White Alone	1,869	93.9%
Householder is Black Alone	86	4.3%
Householder is American Indian Alone	4	0.2%
Householder is Asian Alone	10	0.5%
Householder is Pacific Islander Alone	0	0.0%
Householder is Some Other Race Alone	6	0.3%
Householder is Two or More Races	16	0.8%
Husband-wife Families with Hispanic Householder	31	1.6%
Other Families (No Spouse) by Race of Householder		
Total	1,031	100.0%
Householder is White Alone	877	85.1%
Householder is Black Alone	120	11.6%
Householder is American Indian Alone	3	0.3%
Householder is Asian Alone	6	0.6%
Householder is Pacific Islander Alone	0	0.0%
Householder is Some Other Race Alone	3	0.3%
Householder is Two or More Races	22	2.1%
Other Families with Hispanic Householder	15	1.5%
Nonfamily Households by Race of Householder		
Total	1,941	100.0%
Householder is White Alone	1,774	91.4%
Householder is Black Alone	126	6.5%
Householder is American Indian Alone	6	0.3%
Householder is Asian Alone	7	0.4%
Householder is Pacific Islander Alone	0	0.0%
Householder is Some Other Race Alone	5	0.3%
Householder is Two or More Races	23	1.2%
Nonfamily Households with Hispanic Householder	24	1.2%

Source: U.S. Census Bureau, Census 2010 Summary File 1.

2010 Census Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Total Housing Units by Occupancy

Total	5,690	100.0%
Occupied Housing Units	4,963	87.2%
Vacant Housing Units		
For Rent	278	4.9%
Rented, not Occupied	7	0.1%
For Sale Only	111	2.0%
Sold, not Occupied	22	0.4%
For Seasonal/Recreational/Occasional Use	13	0.2%
For Migrant Workers	0	0.0%
Other Vacant	296	5.2%
Total Vacancy Rate	12.8%	

Households by Tenure and Mortgage Status

Total	4,963	100.0%
Owner Occupied	2,948	59.4%
Owned with a Mortgage/Loan	1,811	36.5%
Owned Free and Clear	1,137	22.9%
Average Household Size	2.41	
Renter Occupied	2,015	40.6%
Average Household Size	2.25	

Owner-occupied Housing Units by Race of Householder

Total	2,948	100.0%
Householder is White Alone	2,764	93.8%
Householder is Black Alone	124	4.2%
Householder is American Indian Alone	5	0.2%
Householder is Asian Alone	14	0.5%
Householder is Pacific Islander Alone	0	0.0%
Householder is Some Other Race Alone	7	0.2%
Householder is Two or More Races	34	1.2%
Owner-occupied Housing Units with Hispanic Householder	33	1.1%

Renter-occupied Housing Units by Race of Householder

Total	2,015	100.0%
Householder is White Alone	1,756	87.1%
Householder is Black Alone	208	10.3%
Householder is American Indian Alone	8	0.4%
Householder is Asian Alone	9	0.4%
Householder is Pacific Islander Alone	0	0.0%
Householder is Some Other Race Alone	7	0.3%
Householder is Two or More Races	27	1.3%
Renter-occupied Housing Units with Hispanic Householder	37	1.8%

Average Household Size by Race/Hispanic Origin of Householder

Householder is White Alone	2.33
Householder is Black Alone	2.49
Householder is American Indian Alone	3.00
Householder is Asian Alone	2.65
Householder is Pacific Islander Alone	0.00
Householder is Some Other Race Alone	2.64
Householder is Two or More Races	2.64
Householder is Hispanic	2.73

Source: U.S. Census Bureau, Census 2010 Summary File 1.

ACS Population Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
TOTALS				
Total Population	13,775		24	
Total Households	4,424		214	
Total Housing Units	5,595		179	
POPULATION AGE 3+ YEARS BY SCHOOL ENROLLMENT				
Total	13,321	100.0%	109	
Enrolled in school	3,639	27.3%	378	
Enrolled in nursery school, preschool	328	2.5%	128	
Public school	186	1.4%	112	
Private school	142	1.1%	102	
Enrolled in kindergarten	171	1.3%	93	
Public school	171	1.3%	93	
Private school	0	0.0%	17	
Enrolled in grade 1 to grade 4	638	4.8%	139	
Public school	601	4.5%	138	
Private school	37	0.3%	29	
Enrolled in grade 5 to grade 8	590	4.4%	160	
Public school	463	3.5%	142	
Private school	127	1.0%	79	
Enrolled in grade 9 to grade 12	856	6.4%	148	
Public school	600	4.5%	138	
Private school	256	1.9%	83	
Enrolled in college undergraduate years	994	7.5%	272	
Public school	663	5.0%	232	
Private school	331	2.5%	170	
Enrolled in graduate or professional school	62	0.5%	50	
Public school	3	0.0%	8	
Private school	59	0.4%	49	
Not enrolled in school	9,682	72.7%	407	
POPULATION AGE 65+ BY RELATIONSHIP AND HOUSEHOLD TYPE				
Total	1,921	100.0%	161	
Living in Households	1,682	87.6%	170	
Living in Family Households	1,006	52.4%	167	
Householder	513	26.7%	116	
Spouse	315	16.4%	66	
Parent	0	0.0%	17	
Parent-in-law	121	6.3%	111	
Other Relative	57	3.0%	65	
Nonrelative	0	0.0%	17	
Living in Nonfamily Households	676	35.2%	152	
Householder	632	32.9%	149	
Nonrelative	44	2.3%	28	
Living in Group Quarters	239	12.4%	98	

ACS Population Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
HOUSEHOLDS BY TYPE AND SIZE				
Family Households	2,668	60.3%	237	
2-Person	1,159	26.2%	177	
3-Person	604	13.7%	150	
4-Person	650	14.7%	162	
5-Person	172	3.9%	82	
6-Person	48	1.1%	37	
7+ Person	35	0.8%	30	
Nonfamily Households	1,756	39.7%	244	
1-Person	1,572	35.5%	243	
2-Person	174	3.9%	66	
3-Person	10	0.2%	15	
4-Person	0	0.0%	17	
5-Person	0	0.0%	17	
6-Person	0	0.0%	17	
7+ Person	0	0.0%	17	
HOUSEHOLDS BY PRESENCE OF PEOPLE UNDER 18 YEARS BY HOUSEHOLD TYPE				
Households with one or more people under 18 years	1,356	30.7%	182	
Family households	1,356	30.7%	182	
Married-couple family	807	18.2%	141	
Male householder, no wife present	220	5.0%	104	
Female householder, no husband present	329	7.4%	105	
Nonfamily households	0	0.0%	17	
Households with no people under 18 years	3,068	69.3%	208	
Married-couple family	1,098	24.8%	151	
Other family	214	4.8%	99	
Nonfamily households	1,756	39.7%	244	
HOUSEHOLDS BY PRESENCE OF PEOPLE 65 YEARS AND OVER, HOUSEHOLD SIZE AND HOUSEHOLD TYPE				
Households with Pop 65+	1,314	29.7%	142	
1-Person	632	14.3%	149	
2+ Person Family	638	14.4%	114	
2+ Person Nonfamily	44	1.0%	27	
Households with No Pop 65+	3,110	70.3%	201	
1-Person	940	21.2%	213	
2+ Person Family	2,030	45.9%	226	
2+ Person Nonfamily	140	3.2%	74	

ACS Population Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
POPULATION AGE 5+ YEARS BY LANGUAGE SPOKEN AT HOME AND ABILITY TO SPEAK ENGLISH				
Total	12,730	100.0%	170	
5 to 17 years				
Speak only English	1,905	15.0%	219	
Speak Spanish	10	0.1%	16	
Speak English "very well" or "well"	10	0.1%	16	
Speak English "not well"	0	0.0%	17	
Speak English "not at all"	0	0.0%	17	
Speak other Indo-European languages	0	0.0%	17	
Speak English "very well" or "well"	0	0.0%	17	
Speak English "not well"	0	0.0%	17	
Speak English "not at all"	0	0.0%	17	
Speak Asian and Pacific Island languages	0	0.0%	17	
Speak English "very well" or "well"	0	0.0%	17	
Speak English "not well"	0	0.0%	17	
Speak English "not at all"	0	0.0%	17	
Speak other languages	0	0.0%	17	
Speak English "very well" or "well"	0	0.0%	17	
Speak English "not well"	0	0.0%	17	
Speak English "not at all"	0	0.0%	17	
18 to 64 years				
Speak only English	8,667	68.1%	218	
Speak Spanish	101	0.8%	71	
Speak English "very well" or "well"	101	0.8%	73	
Speak English "not well"	0	0.0%	17	
Speak English "not at all"	0	0.0%	17	
Speak other Indo-European languages	53	0.4%	61	
Speak English "very well" or "well"	45	0.4%	57	
Speak English "not well"	8	0.1%	13	
Speak English "not at all"	0	0.0%	17	
Speak Asian and Pacific Island languages	73	0.6%	51	
Speak English "very well" or "well"	49	0.4%	42	
Speak English "not well"	24	0.2%	32	
Speak English "not at all"	0	0.0%	17	
Speak other languages	0	0.0%	17	
Speak English "very well" or "well"	0	0.0%	17	
Speak English "not well"	0	0.0%	17	
Speak English "not at all"	0	0.0%	17	
65 years and over				
Speak only English	1,869	14.7%	155	
Speak Spanish	28	0.2%	40	
Speak English "very well" or "well"	28	0.2%	40	
Speak English "not well"	0	0.0%	17	
Speak English "not at all"	0	0.0%	17	
Speak other Indo-European languages	9	0.1%	20	
Speak English "very well" or "well"	9	0.1%	20	
Speak English "not well"	0	0.0%	17	
Speak English "not at all"	0	0.0%	17	
Speak Asian and Pacific Island languages	15	0.1%	23	
Speak English "very well" or "well"	15	0.1%	23	
Speak English "not well"	0	0.0%	17	
Speak English "not at all"	0	0.0%	17	
Speak other languages	0	0.0%	17	
Speak English "very well" or "well"	0	0.0%	17	
Speak English "not well"	0	0.0%	17	
Speak English "not at all"	0	0.0%	17	

Source: U.S. Census Bureau, 2013-2017 American Community Survey

Reliability:  high  medium  low

June 28, 2019

ACS Population Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
WORKERS AGE 16+ YEARS BY PLACE OF WORK				
Total	4,968	100.0%	320	
Worked in state and in county of residence	3,709	74.7%	308	
Worked in state and outside county of residence	1,249	25.1%	240	
Worked outside state of residence	10	0.2%	13	
SEX BY CLASS OF WORKER FOR THE CIVILIAN EMPLOYED POPULATION 16 YEARS AND OVER				
Total:	5,042	100.0%	315	
Male:	2,441	48.4%	207	
Employee of private company	1,735	34.4%	192	
Self-employed in own incorporated business	23	0.5%	22	
Private not-for-profit wage and salary workers	170	3.4%	78	
Local government workers	154	3.1%	76	
State government workers	163	3.2%	104	
Federal government workers	34	0.7%	31	
Self-employed in own not incorporated business workers	162	3.2%	86	
Unpaid family workers	0	0.0%	17	
Female:	2,601	51.6%	276	
Employee of private company	1,732	34.4%	223	
Self-employed in own incorporated business	25	0.5%	30	
Private not-for-profit wage and salary workers	260	5.2%	93	
Local government workers	173	3.4%	76	
State government workers	157	3.1%	78	
Federal government workers	54	1.1%	61	
Self-employed in own not incorporated business workers	200	4.0%	114	
Unpaid family workers	0	0.0%	17	

ACS Population Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
WORKERS AGE 16+ YEARS BY MEANS OF TRANSPORTATION TO WORK				
Total	4,968	100.0%	320	
Drove alone	4,280	86.2%	299	
Carpooled	284	5.7%	118	
Public transportation (excluding taxicab)	2	0.0%	6	
Bus or trolley bus	2	0.0%	6	
Streetcar or trolley car	0	0.0%	17	
Subway or elevated	0	0.0%	17	
Railroad	0	0.0%	17	
Ferryboat	0	0.0%	17	
Taxicab	17	0.3%	20	
Motorcycle	21	0.4%	24	
Bicycle	0	0.0%	17	
Walked	190	3.8%	94	
Other means	11	0.2%	18	
Worked at home	163	3.3%	89	
WORKERS AGE 16+ YEARS (WHO DID NOT WORK FROM HOME) BY TRAVEL TIME TO WORK				
Total	4,805	100.0%	322	
Less than 5 minutes	187	3.9%	78	
5 to 9 minutes	1,592	33.1%	306	
10 to 14 minutes	1,124	23.4%	236	
15 to 19 minutes	369	7.7%	142	
20 to 24 minutes	120	2.5%	70	
25 to 29 minutes	69	1.4%	64	
30 to 34 minutes	255	5.3%	96	
35 to 39 minutes	223	4.6%	116	
40 to 44 minutes	327	6.8%	139	
45 to 59 minutes	337	7.0%	127	
60 to 89 minutes	165	3.4%	100	
90 or more minutes	37	0.8%	31	
Average Travel Time to Work (in minutes)	18.6		2.5	
FEMALES AGE 20-64 YEARS BY AGE OF OWN CHILDREN AND EMPLOYMENT STATUS				
Total	3,492	100.0%	184	
Own children under 6 years only	401	11.5%	135	
In labor force	324	9.3%	140	
Not in labor force	77	2.2%	56	
Own children under 6 years and 6 to 17 years	205	5.9%	96	
In labor force	153	4.4%	69	
Not in labor force	52	1.5%	63	
Own children 6 to 17 years only	568	16.3%	129	
In labor force	455	13.0%	125	
Not in labor force	113	3.2%	55	
No own children under 18 years	2,318	66.4%	248	
In labor force	1,453	41.6%	226	
Not in labor force	865	24.8%	246	

ACS Population Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
CIVILIAN NONINSTITUTIONALIZED POPULATION BY AGE & TYPES OF HEALTH INSURANCE COVERAGE				
Total	11,811	100.0%	202	
Under 19 years:	3,162	26.8%	186	
One Type of Health Insurance:	2,965	25.1%	202	
Employer-Based Health Ins Only	1,720	14.6%	258	
Direct-Purchase Health Ins Only	100	0.8%	83	
Medicare Coverage Only	0	0.0%	17	
Medicaid Coverage Only	1,114	9.4%	223	
TRICARE/Military Hlth Cov Only	31	0.3%	27	
VA Health Care Only	0	0.0%	17	
2+ Types of Health Insurance	111	0.9%	95	
No Health Insurance Coverage	86	0.7%	55	
19 to 34 years:	2,602	22.0%	254	
One Type of Health Insurance:	1,862	15.8%	274	
Employer-Based Health Ins Only	1,053	8.9%	242	
Direct-Purchase Health Ins Only	205	1.7%	130	
Medicare Coverage Only	15	0.1%	24	
Medicaid Coverage Only	582	4.9%	296	
TRICARE/Military Hlth Cov Only	7	0.1%	11	
VA Health Care Only	0	0.0%	17	
2+ Types of Health Insurance	254	2.2%	132	
No Health Insurance Coverage	486	4.1%	184	
35 to 64 years:	4,364	36.9%	239	
One Type of Health Insurance:	3,421	29.0%	241	
Employer-Based Health Ins Only	2,488	21.1%	275	
Direct-Purchase Health Ins Only	257	2.2%	110	
Medicare Coverage Only	198	1.7%	94	
Medicaid Coverage Only	394	3.3%	180	
TRICARE/Military Hlth Cov Only	65	0.6%	86	
VA Health Care Only	19	0.2%	22	
2+ Types of Health Insurance	406	3.4%	135	
No Health Insurance Coverage	537	4.5%	175	
65+ years:	1,683	14.2%	170	
One Type of Health Insurance:	460	3.9%	107	
Employer-Based Health Ins Only	18	0.2%	20	
Direct-Purchase Health Ins Only	22	0.2%	25	
Medicare Coverage Only	420	3.6%	105	
TRICARE/Military Hlth Cov Only	0	0.0%	17	
VA Health Care Only	0	0.0%	17	
2+ Types of Health Insurance:	1,197	10.1%	167	
Employer-Based & Direct-Purchase Health Insurance	0	0.0%	17	
Employer-Based Health & Medicare Insurance	170	1.4%	83	
Direct-Purchase Health & Medicare Insurance	418	3.5%	123	
Medicare & Medicaid Coverage	156	1.3%	84	
Other Private Health Insurance Combos	0	0.0%	17	
Other Public Health Insurance Combos	126	1.1%	112	
Other Health Insurance Combinations	327	2.8%	105	
No Health Insurance Coverage	26	0.2%	38	

ACS Population Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
POPULATION BY RATIO OF INCOME TO POVERTY LEVEL				
Total	11,614	100.0%	207	
Under .50	692	6.0%	285	
.50 to .99	1,815	15.6%	439	
1.00 to 1.24	874	7.5%	411	
1.25 to 1.49	780	6.7%	284	
1.50 to 1.84	734	6.3%	265	
1.85 to 1.99	468	4.0%	278	
2.00 and over	6,251	53.8%	632	
CIVILIAN POPULATION AGE 18 OR OLDER BY VETERAN STATUS				
Total	10,815	100.0%	171	
Veteran	933	8.6%	179	
Nonveteran	9,882	91.4%	227	
Male	5,832	53.9%	192	
Veteran	889	8.2%	174	
Nonveteran	4,943	45.7%	233	
Female	4,983	46.1%	190	
Veteran	44	0.4%	43	
Nonveteran	4,939	45.7%	194	
CIVILIAN VETERANS AGE 18 OR OLDER BY PERIOD OF MILITARY SERVICE				
Total	933	100.0%	179	
Gulf War (9/01 or later), no Gulf War (8/90 to 8/01), no Vietnam Era	74	7.9%	53	
Gulf War (9/01 or later) and Gulf War (8/90 to 8/01), no Vietnam Era	90	9.6%	63	
Gulf War (9/01 or later), and Gulf War (8/90 to 8/01), and Vietnam Era	0	0.0%	17	
Gulf War (8/90 to 8/01), no Vietnam Era	116	12.4%	66	
Gulf War (8/90 to 8/01) and Vietnam Era	10	1.1%	15	
Vietnam Era, no Korean War, no World War II	283	30.3%	115	
Vietnam Era and Korean War, no World War II	0	0.0%	17	
Vietnam Era and Korean War and World War II	0	0.0%	17	
Korean War, no Vietnam Era, no World War II	54	5.8%	37	
Korean War and World War II, no Vietnam Era	0	0.0%	17	
World War II, no Korean War, no Vietnam Era	52	5.6%	56	
Between Gulf War and Vietnam Era only	232	24.9%	98	
Between Vietnam Era and Korean War only	22	2.4%	22	
Between Korean War and World War II only	0	0.0%	17	
Pre-World War II only	0	0.0%	17	
HOUSEHOLDS BY POVERTY STATUS				
Total	4,424	100.0%	214	
Income in the past 12 months below poverty level	976	22.1%	178	
Married-couple family	147	3.3%	94	
Other family - male householder (no wife present)	70	1.6%	75	
Other family - female householder (no husband present)	244	5.5%	92	
Nonfamily household - male householder	214	4.8%	101	
Nonfamily household - female householder	301	6.8%	124	
Income in the past 12 months at or above poverty level	3,448	77.9%	219	
Married-couple family	1,758	39.7%	176	
Other family - male householder (no wife present)	190	4.3%	82	
Other family - female householder (no husband present)	259	5.9%	90	
Nonfamily household - male householder	453	10.2%	154	
Nonfamily household - female householder	788	17.8%	156	

ACS Population Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
HOUSEHOLDS BY OTHER INCOME				
Social Security Income	1,591	36.0%	173	
No Social Security Income	2,833	64.0%	225	
Retirement Income	802	18.1%	152	
No Retirement Income	3,622	81.9%	233	
GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME IN THE PAST 12 MONTHS				
<10% of Income	41	2.7%	38	
10-14.9% of Income	164	10.8%	92	
15-19.9% of Income	150	9.9%	87	
20-24.9% of Income	138	9.1%	75	
25-29.9% of Income	153	10.1%	85	
30-34.9% of Income	91	6.0%	60	
35-39.9% of Income	76	5.0%	50	
40-49.9% of Income	182	12.0%	82	
50+% of Income	498	32.9%	147	
Gross Rent % Inc Not Computed	20	1.3%	24	
HOUSEHOLDS BY PUBLIC ASSISTANCE INCOME IN THE PAST 12 MONTHS				
Total	4,424	100.0%	214	
With public assistance income	101	2.3%	54	
No public assistance income	4,323	97.7%	211	
HOUSEHOLDS BY FOOD STAMPS/SNAP STATUS				
Total	4,424	100.0%	214	
With Food Stamps/SNAP	830	18.8%	165	
With No Food Stamps/SNAP	3,594	81.2%	205	
HOUSEHOLDS BY DISABILITY STATUS				
Total	4,424	100.0%	214	
With 1+ Persons w/Disability	1,521	34.4%	225	
With No Person w/Disability	2,903	65.6%	279	

Data Note: N/A means not available. Population by Ratio of Income to Poverty Level represents persons for whom poverty status is determined. Household income represents income in 2015, adjusted for inflation.

2013-2017 ACS Estimate: The American Community Survey (ACS) replaces census sample data. Esri is releasing the 2013-2017 ACS estimates, five-year period data collected monthly from January 1, 2011 through December 31, 2015. Although the ACS includes many of the subjects previously covered by the decennial census sample, there are significant differences between the two surveys including fundamental differences in survey design and residency rules.

Margin of error (MOE): The MOE is a measure of the variability of the estimate due to sampling error. MOEs enable the data user to measure the range of uncertainty for each estimate with 90 percent confidence. The range of uncertainty is called the confidence interval, and it is calculated by taking the estimate +/- the MOE. For example, if the ACS reports an estimate of 100 with an MOE of +/- 20, then you can be 90 percent certain the value for the whole population falls between 80 and 120.

Reliability: These symbols represent threshold values that Esri has established from the Coefficients of Variation (CV) to designate the usability of the estimates. The CV measures the amount of sampling error relative to the size of the estimate, expressed as a percentage.

-  High Reliability: Small CVs (less than or equal to 12 percent) are flagged green to indicate that the sampling error is small relative to the estimate and the estimate is reasonably reliable.
-  Medium Reliability: Estimates with CVs between 12 and 40 are flagged yellow-use with caution.
-  Low Reliability: Large CVs (over 40 percent) are flagged red to indicate that the sampling error is large relative to the estimate. The estimate is considered very unreliable.

ACS Population Summary

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
TOTALS				
Total Population	16,981		1,053	
Total Households	5,535		329	
Total Housing Units	6,911		366	
POPULATION AGE 3+ YEARS BY SCHOOL ENROLLMENT				
Total	16,446	100.0%	991	
Enrolled in school	4,372	26.6%	473	
Enrolled in nursery school, preschool	429	2.6%	158	
Public school	270	1.6%	114	
Private school	158	1.0%	110	
Enrolled in kindergarten	228	1.4%	96	
Public school	228	1.4%	96	
Private school	0	0.0%	0	
Enrolled in grade 1 to grade 4	814	4.9%	170	
Public school	759	4.6%	167	
Private school	55	0.3%	29	
Enrolled in grade 5 to grade 8	784	4.8%	174	
Public school	631	3.8%	149	
Private school	153	0.9%	79	
Enrolled in grade 9 to grade 12	966	5.9%	159	
Public school	743	4.5%	154	
Private school	223	1.4%	71	
Enrolled in college undergraduate years	1,041	6.3%	300	
Public school	706	4.3%	252	
Private school	335	2.0%	171	
Enrolled in graduate or professional school	110	0.7%	52	
Public school	10	0.1%	16	
Private school	100	0.6%	52	
Not enrolled in school	12,074	73.4%	610	
POPULATION AGE 65+ BY RELATIONSHIP AND HOUSEHOLD TYPE				
Total	2,478	100.0%	263	
Living in Households	2,246	90.6%	250	
Living in Family Households	1,470	59.3%	226	
Householder	722	29.1%	123	
Spouse	517	20.9%	87	
Parent	48	1.9%	24	
Parent-in-law	122	4.9%	109	
Other Relative	60	2.4%	62	
Nonrelative	1	0.0%	12	
Living in Nonfamily Households	776	31.3%	154	
Householder	728	29.4%	150	
Nonrelative	48	1.9%	40	
Living in Group Quarters	232	9.4%	97	

ACS Population Summary

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group

Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
HOUSEHOLDS BY TYPE AND SIZE				
Family Households	3,538	63.9%	275	
2-Person	1,646	29.7%	186	
3-Person	762	13.8%	158	
4-Person	774	14.0%	169	
5-Person	227	4.1%	78	
6-Person	84	1.5%	40	
7+ Person	46	0.8%	32	
Nonfamily Households	1,997	36.1%	263	
1-Person	1,789	32.3%	250	
2-Person	196	3.5%	81	
3-Person	11	0.2%	15	
4-Person	0	0.0%	0	
5-Person	0	0.0%	0	
6-Person	0	0.0%	0	
7+ Person	0	0.0%	0	
HOUSEHOLDS BY PRESENCE OF PEOPLE UNDER 18 YEARS BY HOUSEHOLD TYPE				
Households with one or more people under 18 years	1,650	29.8%	225	
Family households	1,650	29.8%	225	
Married-couple family	1,044	18.9%	179	
Male householder, no wife present	249	4.5%	108	
Female householder, no husband present	357	6.4%	107	
Nonfamily households	0	0.0%	0	
Households with no people under 18 years	3,884	70.2%	300	
Married-couple family	1,647	29.8%	177	
Other family	240	4.3%	94	
Nonfamily households	1,997	36.1%	263	
HOUSEHOLDS BY PRESENCE OF PEOPLE 65 YEARS AND OVER, HOUSEHOLD SIZE AND HOUSEHOLD TYPE				
Households with Pop 65+	1,614	29.2%	190	
1-Person	715	12.9%	150	
2+ Person Family	853	15.4%	142	
2+ Person Nonfamily	46	0.8%	41	
Households with No Pop 65+	3,920	70.8%	308	
1-Person	1,074	19.4%	214	
2+ Person Family	2,684	48.5%	249	
2+ Person Nonfamily	162	2.9%	77	

ACS Population Summary

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group

Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
POPULATION AGE 5+ YEARS BY LANGUAGE SPOKEN AT HOME AND ABILITY TO SPEAK ENGLISH				
Total	15,806	100.0%	910	
5 to 17 years				
Speak only English	2,496	15.8%	342	
Speak Spanish	10	0.1%	16	
Speak English "very well" or "well"	10	0.1%	16	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other Indo-European languages	69	0.4%	37	
Speak English "very well" or "well"	69	0.4%	28	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak Asian and Pacific Island languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
18 to 64 years				
Speak only English	10,405	65.8%	712	
Speak Spanish	124	0.8%	73	
Speak English "very well" or "well"	124	0.8%	73	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other Indo-European languages	150	0.9%	73	
Speak English "very well" or "well"	126	0.8%	72	
Speak English "not well"	24	0.2%	20	
Speak English "not at all"	0	0.0%	0	
Speak Asian and Pacific Island languages	73	0.5%	51	
Speak English "very well" or "well"	49	0.3%	42	
Speak English "not well"	24	0.2%	32	
Speak English "not at all"	0	0.0%	0	
Speak other languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
65 years and over				
Speak only English	2,421	15.3%	258	
Speak Spanish	29	0.2%	40	
Speak English "very well" or "well"	29	0.2%	40	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other Indo-European languages	13	0.1%	20	
Speak English "very well" or "well"	13	0.1%	20	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak Asian and Pacific Island languages	15	0.1%	23	
Speak English "very well" or "well"	15	0.1%	23	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	

Source: U.S. Census Bureau, 2013-2017 American Community Survey

Reliability:  high  medium  low

June 28, 2019

ACS Population Summary

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
WORKERS AGE 16+ YEARS BY PLACE OF WORK				
Total	6,696	100.0%	543	
Worked in state and in county of residence	5,008	74.8%	413	
Worked in state and outside county of residence	1,644	24.6%	281	
Worked outside state of residence	44	0.7%	22	
SEX BY CLASS OF WORKER FOR THE CIVILIAN EMPLOYED POPULATION 16 YEARS AND OVER				
Total:	6,797	100.0%	548	
Male:	3,396	50.0%	304	
Employee of private company	2,334	34.3%	269	
Self-employed in own incorporated business	68	1.0%	26	
Private not-for-profit wage and salary workers	218	3.2%	82	
Local government workers	219	3.2%	78	
State government workers	225	3.3%	102	
Federal government workers	54	0.8%	34	
Self-employed in own not incorporated business workers	273	4.0%	89	
Unpaid family workers	5	0.1%	8	
Female:	3,401	50.0%	368	
Employee of private company	2,281	33.6%	300	
Self-employed in own incorporated business	40	0.6%	31	
Private not-for-profit wage and salary workers	377	5.5%	101	
Local government workers	229	3.4%	74	
State government workers	177	2.6%	81	
Federal government workers	62	0.9%	59	
Self-employed in own not incorporated business workers	227	3.3%	111	
Unpaid family workers	7	0.1%	13	

ACS Population Summary

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
WORKERS AGE 16+ YEARS BY MEANS OF TRANSPORTATION TO WORK				
Total	6,696	100.0%	543	
Drove alone	5,674	84.7%	512	
Carpooled	546	8.2%	128	
Public transportation (excluding taxicab)	2	0.0%	6	
Bus or trolley bus	2	0.0%	6	
Streetcar or trolley car	0	0.0%	0	
Subway or elevated	0	0.0%	0	
Railroad	0	0.0%	0	
Ferryboat	0	0.0%	0	
Taxicab	17	0.3%	20	
Motorcycle	21	0.3%	24	
Bicycle	0	0.0%	0	
Walked	198	3.0%	98	
Other means	16	0.2%	18	
Worked at home	221	3.3%	85	
WORKERS AGE 16+ YEARS (WHO DID NOT WORK FROM HOME) BY TRAVEL TIME TO WORK				
Total	6,474	100.0%	534	
Less than 5 minutes	216	3.3%	75	
5 to 9 minutes	1,747	27.0%	301	
10 to 14 minutes	1,590	24.6%	255	
15 to 19 minutes	735	11.4%	160	
20 to 24 minutes	245	3.8%	76	
25 to 29 minutes	104	1.6%	63	
30 to 34 minutes	371	5.7%	106	
35 to 39 minutes	272	4.2%	118	
40 to 44 minutes	451	7.0%	147	
45 to 59 minutes	491	7.6%	135	
60 to 89 minutes	188	2.9%	98	
90 or more minutes	64	1.0%	32	
Average Travel Time to Work (in minutes)	N/A		N/A	
FEMALES AGE 20-64 YEARS BY AGE OF OWN CHILDREN AND EMPLOYMENT STATUS				
Total	4,557	100.0%	439	
Own children under 6 years only	478	10.5%	172	
In labor force	383	8.4%	168	
Not in labor force	95	2.1%	56	
Own children under 6 years and 6 to 17 years	263	5.8%	95	
In labor force	199	4.4%	71	
Not in labor force	64	1.4%	57	
Own children 6 to 17 years only	724	15.9%	147	
In labor force	580	12.7%	133	
Not in labor force	145	3.2%	67	
No own children under 18 years	3,092	67.9%	398	
In labor force	1,999	43.9%	280	
Not in labor force	1,093	24.0%	294	

ACS Population Summary

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
CIVILIAN NONINSTITUTIONALIZED POPULATION BY AGE & TYPES OF HEALTH INSURANCE COVERAGE				
Total	15,339	100.0%	1,036	
Under 19 years:	3,984	26.0%	497	
One Type of Health Insurance:	3,703	24.1%	484	
Employer-Based Health Ins Only	2,238	14.6%	333	
Direct-Purchase Health Ins Only	137	0.9%	79	
Medicare Coverage Only	0	0.0%	0	
Medicaid Coverage Only	1,269	8.3%	342	
TRICARE/Military Hlth Cov Only	59	0.4%	36	
VA Health Care Only	0	0.0%	0	
2+ Types of Health Insurance	141	0.9%	95	
No Health Insurance Coverage	140	0.9%	56	
19 to 34 years:	3,219	21.0%	476	
One Type of Health Insurance:	2,224	14.5%	415	
Employer-Based Health Ins Only	1,288	8.4%	249	
Direct-Purchase Health Ins Only	299	1.9%	118	
Medicare Coverage Only	16	0.1%	24	
Medicaid Coverage Only	614	4.0%	306	
TRICARE/Military Hlth Cov Only	7	0.0%	11	
VA Health Care Only	0	0.0%	0	
2+ Types of Health Insurance	300	2.0%	143	
No Health Insurance Coverage	695	4.5%	195	
35 to 64 years:	5,889	38.4%	460	
One Type of Health Insurance:	4,710	30.7%	393	
Employer-Based Health Ins Only	3,485	22.7%	326	
Direct-Purchase Health Ins Only	384	2.5%	110	
Medicare Coverage Only	268	1.7%	105	
Medicaid Coverage Only	440	2.9%	176	
TRICARE/Military Hlth Cov Only	98	0.6%	86	
VA Health Care Only	36	0.2%	22	
2+ Types of Health Insurance	517	3.4%	134	
No Health Insurance Coverage	662	4.3%	183	
65+ years:	2,247	14.6%	251	
One Type of Health Insurance:	598	3.9%	133	
Employer-Based Health Ins Only	30	0.2%	22	
Direct-Purchase Health Ins Only	22	0.1%	25	
Medicare Coverage Only	546	3.6%	131	
TRICARE/Military Hlth Cov Only	0	0.0%	0	
VA Health Care Only	0	0.0%	0	
2+ Types of Health Insurance:	1,623	10.6%	226	
Employer-Based & Direct-Purchase Health Insurance	0	0.0%	0	
Employer-Based Health & Medicare Insurance	232	1.5%	80	
Direct-Purchase Health & Medicare Insurance	619	4.0%	134	
Medicare & Medicaid Coverage	199	1.3%	87	
Other Private Health Insurance Combos	0	0.0%	0	
Other Public Health Insurance Combos	132	0.9%	109	
Other Health Insurance Combinations	441	2.9%	114	
No Health Insurance Coverage	26	0.2%	38	

ACS Population Summary

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
POPULATION BY RATIO OF INCOME TO POVERTY LEVEL				
Total	15,140	100.0%	1,021	
Under .50	766	5.1%	260	
.50 to .99	2,056	13.6%	512	
1.00 to 1.24	984	6.5%	393	
1.25 to 1.49	861	5.7%	273	
1.50 to 1.84	1,149	7.6%	300	
1.85 to 1.99	556	3.7%	275	
2.00 and over	8,767	57.9%	733	
CIVILIAN POPULATION AGE 18 OR OLDER BY VETERAN STATUS				
Total	13,231	100.0%	749	
Veteran	1,203	9.1%	195	
Nonveteran	12,028	90.9%	711	
Male	6,873	51.9%	443	
Veteran	1,152	8.7%	188	
Nonveteran	5,721	43.2%	415	
Female	6,358	48.1%	482	
Veteran	51	0.4%	42	
Nonveteran	6,307	47.7%	482	
CIVILIAN VETERANS AGE 18 OR OLDER BY PERIOD OF MILITARY SERVICE				
Total	1,203	100.0%	195	
Gulf War (9/01 or later), no Gulf War (8/90 to 8/01), no Vietnam Era	82	6.8%	48	
Gulf War (9/01 or later) and Gulf War (8/90 to 8/01), no Vietnam Era	103	8.6%	63	
Gulf War (9/01 or later), and Gulf War (8/90 to 8/01), and Vietnam Era	1	0.1%	6	
Gulf War (8/90 to 8/01), no Vietnam Era	155	12.9%	68	
Gulf War (8/90 to 8/01) and Vietnam Era	10	0.8%	15	
Vietnam Era, no Korean War, no World War II	385	32.0%	126	
Vietnam Era and Korean War, no World War II	5	0.4%	8	
Vietnam Era and Korean War and World War II	0	0.0%	0	
Korean War, no Vietnam Era, no World War II	85	7.1%	41	
Korean War and World War II, no Vietnam Era	1	0.1%	8	
World War II, no Korean War, no Vietnam Era	54	4.5%	54	
Between Gulf War and Vietnam Era only	277	23.0%	92	
Between Vietnam Era and Korean War only	45	3.7%	23	
Between Korean War and World War II only	0	0.0%	0	
Pre-World War II only	0	0.0%	0	
HOUSEHOLDS BY POVERTY STATUS				
Total	5,535	100.0%	329	
Income in the past 12 months below poverty level	1,080	19.5%	206	
Married-couple family	185	3.3%	84	
Other family - male householder (no wife present)	72	1.3%	79	
Other family - female householder (no husband present)	260	4.7%	98	
Nonfamily household - male householder	232	4.2%	104	
Nonfamily household - female householder	331	6.0%	123	
Income in the past 12 months at or above poverty level	4,454	80.5%	279	
Married-couple family	2,506	45.3%	216	
Other family - male householder (no wife present)	222	4.0%	79	
Other family - female householder (no husband present)	293	5.3%	96	
Nonfamily household - male householder	584	10.6%	142	
Nonfamily household - female householder	850	15.4%	172	

Source: U.S. Census Bureau, 2013-2017 American Community Survey

Reliability:  high  medium  low

June 28, 2019

ACS Population Summary

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
HOUSEHOLDS BY OTHER INCOME				
Social Security Income	1,985	35.9%	214	High
No Social Security Income	3,549	64.1%	291	High
Retirement Income	1,026	18.5%	165	High
No Retirement Income	4,509	81.5%	339	High
GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME IN THE PAST 12 MONTHS				
<10% of Income	50	3.0%	36	Low
10-14.9% of Income	203	12.3%	94	Medium
15-19.9% of Income	159	9.6%	85	Medium
20-24.9% of Income	143	8.7%	72	Medium
25-29.9% of Income	160	9.7%	85	Medium
30-34.9% of Income	96	5.8%	57	Medium
35-39.9% of Income	77	4.7%	49	Medium
40-49.9% of Income	182	11.0%	92	Medium
50+% of Income	513	31.0%	145	Medium
Gross Rent % Inc Not Computed	70	4.2%	35	Medium
HOUSEHOLDS BY PUBLIC ASSISTANCE INCOME IN THE PAST 12 MONTHS				
Total	5,535	100.0%	329	High
With public assistance income	130	2.3%	61	Medium
No public assistance income	5,405	97.7%	329	High
HOUSEHOLDS BY FOOD STAMPS/SNAP STATUS				
Total	5,535	100.0%	329	High
With Food Stamps/SNAP	889	16.1%	185	Medium
With No Food Stamps/SNAP	4,645	83.9%	298	High
HOUSEHOLDS BY DISABILITY STATUS				
Total	5,535	100.0%	329	High
With 1+ Persons w/Disability	1,882	34.0%	239	High
With No Person w/Disability	3,652	66.0%	300	High

Data Note: N/A means not available. Population by Ratio of Income to Poverty Level represents persons for whom poverty status is determined. Household income represents income in 2015, adjusted for inflation.

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Reliability: These symbols represent threshold values that Esri has established from the Coefficients of Variation (CV) to designate the usability of the estimates. The CV measures the amount of sampling error relative to the size of the estimate, expressed as a percentage.

- High Reliability: Small CVs (less than or equal to 12 percent) are flagged green to indicate that the sampling error is small relative to the estimate and the estimate is reasonably reliable.
- Medium Reliability: Estimates with CVs between 12 and 40 are flagged yellow-use with caution.
- Low Reliability: Large CVs (over 40 percent) are flagged red to indicate that the sampling error is large relative to the estimate. The estimate is considered very unreliable.

ACS Population Summary

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group

Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
TOTALS				
Total Population	23,345		1,217	
Total Households	7,728		369	
Total Housing Units	9,811		408	
POPULATION AGE 3+ YEARS BY SCHOOL ENROLLMENT				
Total	22,669	100.0%	1,152	
Enrolled in school	5,947	26.2%	547	
Enrolled in nursery school, preschool	553	2.4%	185	
Public school	343	1.5%	142	
Private school	210	0.9%	119	
Enrolled in kindergarten	306	1.3%	112	
Public school	302	1.3%	112	
Private school	4	0.0%	4	
Enrolled in grade 1 to grade 4	1,163	5.1%	202	
Public school	1,082	4.8%	198	
Private school	81	0.4%	37	
Enrolled in grade 5 to grade 8	1,139	5.0%	208	
Public school	954	4.2%	187	
Private school	185	0.8%	83	
Enrolled in grade 9 to grade 12	1,409	6.2%	200	
Public school	1,115	4.9%	189	
Private school	294	1.3%	83	
Enrolled in college undergraduate years	1,223	5.4%	305	
Public school	833	3.7%	256	
Private school	390	1.7%	173	
Enrolled in graduate or professional school	155	0.7%	75	
Public school	42	0.2%	25	
Private school	113	0.5%	71	
Not enrolled in school	16,722	73.8%	710	
POPULATION AGE 65+ BY RELATIONSHIP AND HOUSEHOLD TYPE				
Total	3,528	100.0%	309	
Living in Households	3,281	93.0%	296	
Living in Family Households	2,280	64.6%	273	
Householder	1,111	31.5%	145	
Spouse	854	24.2%	111	
Parent	96	2.7%	50	
Parent-in-law	138	3.9%	109	
Other Relative	73	2.1%	63	
Nonrelative	8	0.2%	21	
Living in Nonfamily Households	1,001	28.4%	166	
Householder	933	26.4%	161	
Nonrelative	68	1.9%	43	
Living in Group Quarters	247	7.0%	103	

ACS Population Summary

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
HOUSEHOLDS BY TYPE AND SIZE				
Family Households	5,144	66.6%	317	
2-Person	2,460	31.8%	228	
3-Person	1,042	13.5%	175	
4-Person	1,074	13.9%	188	
5-Person	358	4.6%	101	
6-Person	135	1.7%	54	
7+ Person	75	1.0%	38	
Nonfamily Households	2,584	33.4%	283	
1-Person	2,316	30.0%	271	
2-Person	246	3.2%	84	
3-Person	21	0.3%	16	
4-Person	1	0.0%	2	
5-Person	0	0.0%	0	
6-Person	0	0.0%	0	
7+ Person	0	0.0%	0	
HOUSEHOLDS BY PRESENCE OF PEOPLE UNDER 18 YEARS BY HOUSEHOLD TYPE				
Households with one or more people under 18 years	2,300	29.8%	256	
Family households	2,295	29.7%	256	
Married-couple family	1,543	20.0%	209	
Male householder, no wife present	305	3.9%	114	
Female householder, no husband present	447	5.8%	116	
Nonfamily households	5	0.1%	12	
Households with no people under 18 years	5,428	70.2%	336	
Married-couple family	2,536	32.8%	220	
Other family	313	4.1%	99	
Nonfamily households	2,579	33.4%	283	
HOUSEHOLDS BY PRESENCE OF PEOPLE 65 YEARS AND OVER, HOUSEHOLD SIZE AND HOUSEHOLD TYPE				
Households with Pop 65+	2,288	29.6%	210	
1-Person	914	11.8%	161	
2+ Person Family	1,314	17.0%	162	
2+ Person Nonfamily	60	0.8%	42	
Households with No Pop 65+	5,440	70.4%	346	
1-Person	1,402	18.1%	230	
2+ Person Family	3,830	49.6%	292	
2+ Person Nonfamily	209	2.7%	80	

ACS Population Summary

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group

Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
POPULATION AGE 5+ YEARS BY LANGUAGE SPOKEN AT HOME AND ABILITY TO SPEAK ENGLISH				
Total	21,868	100.0%	1,071	
5 to 17 years				
Speak only English	3,584	16.4%	437	
Speak Spanish	13	0.1%	16	
Speak English "very well" or "well"	13	0.1%	16	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other Indo-European languages	152	0.7%	77	
Speak English "very well" or "well"	147	0.7%	58	
Speak English "not well"	3	0.0%	7	
Speak English "not at all"	2	0.0%	6	
Speak Asian and Pacific Island languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
18 to 64 years				
Speak only English	14,102	64.5%	820	
Speak Spanish	177	0.8%	84	
Speak English "very well" or "well"	171	0.8%	83	
Speak English "not well"	6	0.0%	7	
Speak English "not at all"	0	0.0%	0	
Speak other Indo-European languages	232	1.1%	132	
Speak English "very well" or "well"	204	0.9%	125	
Speak English "not well"	28	0.1%	26	
Speak English "not at all"	0	0.0%	0	
Speak Asian and Pacific Island languages	81	0.4%	52	
Speak English "very well" or "well"	57	0.3%	43	
Speak English "not well"	24	0.1%	32	
Speak English "not at all"	0	0.0%	0	
Speak other languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
65 years and over				
Speak only English	3,459	15.8%	304	
Speak Spanish	31	0.1%	40	
Speak English "very well" or "well"	31	0.1%	40	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other Indo-European languages	23	0.1%	22	
Speak English "very well" or "well"	23	0.1%	22	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak Asian and Pacific Island languages	15	0.1%	23	
Speak English "very well" or "well"	15	0.1%	23	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	

Source: U.S. Census Bureau, 2013-2017 American Community Survey

Reliability:  high  medium  low

June 28, 2019

ACS Population Summary

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
WORKERS AGE 16+ YEARS BY PLACE OF WORK				
Total	9,292	100.0%	646	
Worked in state and in county of residence	6,813	73.3%	493	
Worked in state and outside county of residence	2,386	25.7%	327	
Worked outside state of residence	93	1.0%	50	
SEX BY CLASS OF WORKER FOR THE CIVILIAN EMPLOYED POPULATION 16 YEARS AND OVER				
Total:	9,414	100.0%	650	
Male:	4,766	50.6%	375	
Employee of private company	3,205	34.0%	330	
Self-employed in own incorporated business	108	1.1%	48	
Private not-for-profit wage and salary workers	264	2.8%	93	
Local government workers	366	3.9%	95	
State government workers	282	3.0%	115	
Federal government workers	147	1.6%	62	
Self-employed in own not incorporated business workers	389	4.1%	114	
Unpaid family workers	6	0.1%	8	
Female:	4,648	49.4%	412	
Employee of private company	3,115	33.1%	343	
Self-employed in own incorporated business	48	0.5%	39	
Private not-for-profit wage and salary workers	479	5.1%	121	
Local government workers	326	3.5%	93	
State government workers	286	3.0%	85	
Federal government workers	85	0.9%	61	
Self-employed in own not incorporated business workers	299	3.2%	115	
Unpaid family workers	10	0.1%	14	

ACS Population Summary

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
WORKERS AGE 16+ YEARS BY MEANS OF TRANSPORTATION TO WORK				
Total	9,292	100.0%	646	
Drove alone	7,802	84.0%	593	
Carpooled	823	8.9%	206	
Public transportation (excluding taxicab)	5	0.1%	9	
Bus or trolley bus	5	0.1%	9	
Streetcar or trolley car	0	0.0%	0	
Subway or elevated	0	0.0%	0	
Railroad	0	0.0%	0	
Ferryboat	0	0.0%	0	
Taxicab	17	0.2%	20	
Motorcycle	21	0.2%	24	
Bicycle	0	0.0%	0	
Walked	217	2.3%	99	
Other means	65	0.7%	27	
Worked at home	342	3.7%	107	
WORKERS AGE 16+ YEARS (WHO DID NOT WORK FROM HOME) BY TRAVEL TIME TO WORK				
Total	8,950	100.0%	634	
Less than 5 minutes	302	3.4%	83	
5 to 9 minutes	1,891	21.1%	311	
10 to 14 minutes	2,118	23.7%	323	
15 to 19 minutes	1,274	14.2%	209	
20 to 24 minutes	628	7.0%	120	
25 to 29 minutes	181	2.0%	79	
30 to 34 minutes	563	6.3%	139	
35 to 39 minutes	323	3.6%	136	
40 to 44 minutes	580	6.5%	173	
45 to 59 minutes	719	8.0%	178	
60 to 89 minutes	265	3.0%	101	
90 or more minutes	106	1.2%	42	
Average Travel Time to Work (in minutes)	N/A		N/A	
FEMALES AGE 20-64 YEARS BY AGE OF OWN CHILDREN AND EMPLOYMENT STATUS				
Total	6,185	100.0%	486	
Own children under 6 years only	597	9.7%	186	
In labor force	485	7.8%	181	
Not in labor force	112	1.8%	61	
Own children under 6 years and 6 to 17 years	370	6.0%	109	
In labor force	284	4.6%	87	
Not in labor force	86	1.4%	58	
Own children 6 to 17 years only	1,042	16.8%	169	
In labor force	848	13.7%	153	
Not in labor force	193	3.1%	73	
No own children under 18 years	4,177	67.5%	439	
In labor force	2,764	44.7%	320	
Not in labor force	1,413	22.8%	311	

ACS Population Summary

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
CIVILIAN NONINSTITUTIONALIZED POPULATION BY AGE & TYPES OF HEALTH INSURANCE COVERAGE				
Total	21,310	100.0%	1,191	
Under 19 years:	5,515	25.9%	592	
One Type of Health Insurance:	5,003	23.5%	573	
Employer-Based Health Ins Only	3,026	14.2%	418	
Direct-Purchase Health Ins Only	236	1.1%	102	
Medicare Coverage Only	0	0.0%	0	
Medicaid Coverage Only	1,666	7.8%	381	
TRICARE/Military Hlth Cov Only	75	0.4%	59	
VA Health Care Only	0	0.0%	0	
2+ Types of Health Insurance	198	0.9%	102	
No Health Insurance Coverage	314	1.5%	94	
19 to 34 years:	4,276	20.1%	527	
One Type of Health Insurance:	2,909	13.7%	450	
Employer-Based Health Ins Only	1,773	8.3%	285	
Direct-Purchase Health Ins Only	406	1.9%	149	
Medicare Coverage Only	23	0.1%	26	
Medicaid Coverage Only	693	3.3%	309	
TRICARE/Military Hlth Cov Only	14	0.1%	15	
VA Health Care Only	0	0.0%	0	
2+ Types of Health Insurance	370	1.7%	152	
No Health Insurance Coverage	997	4.7%	241	
35 to 64 years:	8,229	38.6%	529	
One Type of Health Insurance:	6,530	30.6%	466	
Employer-Based Health Ins Only	4,925	23.1%	402	
Direct-Purchase Health Ins Only	551	2.6%	144	
Medicare Coverage Only	328	1.5%	115	
Medicaid Coverage Only	528	2.5%	184	
TRICARE/Military Hlth Cov Only	134	0.6%	100	
VA Health Care Only	63	0.3%	31	
2+ Types of Health Insurance	737	3.5%	149	
No Health Insurance Coverage	962	4.5%	207	
65+ years:	3,290	15.4%	296	
One Type of Health Insurance:	827	3.9%	153	
Employer-Based Health Ins Only	44	0.2%	31	
Direct-Purchase Health Ins Only	22	0.1%	25	
Medicare Coverage Only	762	3.6%	149	
TRICARE/Military Hlth Cov Only	0	0.0%	0	
VA Health Care Only	0	0.0%	0	
2+ Types of Health Insurance:	2,431	11.4%	272	
Employer-Based & Direct-Purchase Health Insurance	2	0.0%	3	
Employer-Based Health & Medicare Insurance	411	1.9%	97	
Direct-Purchase Health & Medicare Insurance	914	4.3%	164	
Medicare & Medicaid Coverage	278	1.3%	102	
Other Private Health Insurance Combos	0	0.0%	0	
Other Public Health Insurance Combos	185	0.9%	110	
Other Health Insurance Combinations	641	3.0%	129	
No Health Insurance Coverage	32	0.2%	38	

ACS Population Summary

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
POPULATION BY RATIO OF INCOME TO POVERTY LEVEL				
Total	21,100	100.0%	1,178	
Under .50	1,077	5.1%	283	
.50 to .99	2,622	12.4%	557	
1.00 to 1.24	1,262	6.0%	416	
1.25 to 1.49	1,237	5.9%	318	
1.50 to 1.84	1,660	7.9%	383	
1.85 to 1.99	751	3.6%	288	
2.00 and over	12,492	59.2%	894	
CIVILIAN POPULATION AGE 18 OR OLDER BY VETERAN STATUS				
Total	18,118	100.0%	860	
Veteran	1,658	9.2%	225	
Nonveteran	16,460	90.8%	819	
Male	9,502	52.4%	521	
Veteran	1,593	8.8%	219	
Nonveteran	7,909	43.7%	493	
Female	8,616	47.6%	533	
Veteran	65	0.4%	44	
Nonveteran	8,551	47.2%	532	
CIVILIAN VETERANS AGE 18 OR OLDER BY PERIOD OF MILITARY SERVICE				
Total	1,658	100.0%	225	
Gulf War (9/01 or later), no Gulf War (8/90 to 8/01), no Vietnam Era	97	5.9%	52	
Gulf War (9/01 or later) and Gulf War (8/90 to 8/01), no Vietnam Era	125	7.5%	65	
Gulf War (9/01 or later), and Gulf War (8/90 to 8/01), and Vietnam Era	5	0.3%	7	
Gulf War (8/90 to 8/01), no Vietnam Era	193	11.6%	84	
Gulf War (8/90 to 8/01) and Vietnam Era	12	0.7%	15	
Vietnam Era, no Korean War, no World War II	540	32.6%	138	
Vietnam Era and Korean War, no World War II	8	0.5%	8	
Vietnam Era and Korean War and World War II	0	0.0%	0	
Korean War, no Vietnam Era, no World War II	141	8.5%	55	
Korean War and World War II, no Vietnam Era	5	0.3%	9	
World War II, no Korean War, no Vietnam Era	71	4.3%	55	
Between Gulf War and Vietnam Era only	374	22.6%	111	
Between Vietnam Era and Korean War only	81	4.9%	35	
Between Korean War and World War II only	6	0.4%	8	
Pre-World War II only	0	0.0%	0	
HOUSEHOLDS BY POVERTY STATUS				
Total	7,728	100.0%	369	
Income in the past 12 months below poverty level	1,361	17.6%	219	
Married-couple family	279	3.6%	92	
Other family - male householder (no wife present)	81	1.0%	80	
Other family - female householder (no husband present)	303	3.9%	106	
Nonfamily household - male householder	287	3.7%	112	
Nonfamily household - female householder	411	5.3%	128	
Income in the past 12 months at or above poverty level	6,367	82.4%	321	
Married-couple family	3,801	49.2%	261	
Other family - male householder (no wife present)	294	3.8%	88	
Other family - female householder (no husband present)	386	5.0%	102	
Nonfamily household - male householder	839	10.9%	163	
Nonfamily household - female householder	1,047	13.5%	179	

ACS Population Summary

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
HOUSEHOLDS BY OTHER INCOME				
Social Security Income	2,806	36.3%	242	High
No Social Security Income	4,922	63.7%	331	High
Retirement Income	1,452	18.8%	182	High
No Retirement Income	6,275	81.2%	378	High
GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME IN THE PAST 12 MONTHS				
<10% of Income	71	3.5%	41	Medium
10-14.9% of Income	274	13.6%	109	Medium
15-19.9% of Income	202	10.0%	92	Medium
20-24.9% of Income	168	8.3%	73	Medium
25-29.9% of Income	201	10.0%	93	Medium
30-34.9% of Income	119	5.9%	59	Medium
35-39.9% of Income	94	4.7%	51	Medium
40-49.9% of Income	197	9.8%	93	Medium
50+% of Income	551	27.3%	147	Medium
Gross Rent % Inc Not Computed	139	6.9%	65	Medium
HOUSEHOLDS BY PUBLIC ASSISTANCE INCOME IN THE PAST 12 MONTHS				
Total	7,728	100.0%	369	High
With public assistance income	180	2.3%	70	Medium
No public assistance income	7,547	97.7%	369	High
HOUSEHOLDS BY FOOD STAMPS/SNAP STATUS				
Total	7,728	100.0%	369	High
With Food Stamps/SNAP	1,077	13.9%	194	High
With No Food Stamps/SNAP	6,650	86.1%	338	High
HOUSEHOLDS BY DISABILITY STATUS				
Total	7,728	100.0%	369	High
With 1+ Persons w/Disability	2,551	33.0%	264	High
With No Person w/Disability	5,177	67.0%	341	High

Data Note: N/A means not available. Population by Ratio of Income to Poverty Level represents persons for whom poverty status is determined. Household income represents income in 2015, adjusted for inflation.

2013-2017 ACS Estimate: The American Community Survey (ACS) replaces census sample data. Esri is releasing the 2013-2017 ACS estimates, five-year period data collected monthly from January 1, 2011 through December 31, 2015. Although the ACS includes many of the subjects previously covered by the decennial census sample, there are significant differences between the two surveys including fundamental differences in survey design and residency rules.

Margin of error (MOE): The MOE is a measure of the variability of the estimate due to sampling error. MOEs enable the data user to measure the range of uncertainty for each estimate with 90 percent confidence. The range of uncertainty is called the confidence interval, and it is calculated by taking the estimate +/- the MOE. For example, if the ACS reports an estimate of 100 with an MOE of +/- 20, then you can be 90 percent certain the value for the whole population falls between 80 and 120.

Reliability: These symbols represent threshold values that Esri has established from the Coefficients of Variation (CV) to designate the usability of the estimates. The CV measures the amount of sampling error relative to the size of the estimate, expressed as a percentage.

-  High Reliability: Small CVs (less than or equal to 12 percent) are flagged green to indicate that the sampling error is small relative to the estimate and the estimate is reasonably reliable.
-  Medium Reliability: Estimates with CVs between 12 and 40 are flagged yellow-use with caution.
-  Low Reliability: Large CVs (over 40 percent) are flagged red to indicate that the sampling error is large relative to the estimate. The estimate is considered very unreliable.



ACS Population Summary

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
TOTALS				
Total Population	29,103		1,273	
Total Households	9,722		381	
Total Housing Units	12,352		422	
POPULATION AGE 3+ YEARS BY SCHOOL ENROLLMENT				
Total	28,255	100.0%	1,211	
Enrolled in school	7,434	26.3%	576	
Enrolled in nursery school, preschool	610	2.2%	187	
Public school	382	1.4%	142	
Private school	228	0.8%	121	
Enrolled in kindergarten	362	1.3%	115	
Public school	352	1.2%	115	
Private school	10	0.0%	6	
Enrolled in grade 1 to grade 4	1,499	5.3%	210	
Public school	1,359	4.8%	206	
Private school	140	0.5%	41	
Enrolled in grade 5 to grade 8	1,552	5.5%	214	
Public school	1,266	4.5%	193	
Private school	286	1.0%	85	
Enrolled in grade 9 to grade 12	1,824	6.5%	219	
Public school	1,490	5.3%	207	
Private school	334	1.2%	89	
Enrolled in college undergraduate years	1,393	4.9%	318	
Public school	943	3.3%	260	
Private school	450	1.6%	192	
Enrolled in graduate or professional school	192	0.7%	81	
Public school	67	0.2%	38	
Private school	126	0.4%	71	
Not enrolled in school	20,822	73.7%	748	
POPULATION AGE 65+ BY RELATIONSHIP AND HOUSEHOLD TYPE				
Total	4,549	100.0%	330	
Living in Households	4,301	94.5%	318	
Living in Family Households	3,108	68.3%	297	
Householder	1,504	33.1%	154	
Spouse	1,212	26.6%	119	
Parent	136	3.0%	63	
Parent-in-law	154	3.4%	116	
Other Relative	82	1.8%	65	
Nonrelative	20	0.4%	23	
Living in Nonfamily Households	1,193	26.2%	170	
Householder	1,112	24.4%	165	
Nonrelative	81	1.8%	44	
Living in Group Quarters	248	5.5%	103	

ACS Population Summary

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
HOUSEHOLDS BY TYPE AND SIZE				
Family Households	6,620	68.1%	330	
2-Person	3,203	32.9%	236	
3-Person	1,287	13.2%	179	
4-Person	1,351	13.9%	199	
5-Person	477	4.9%	103	
6-Person	185	1.9%	57	
7+ Person	116	1.2%	44	
Nonfamily Households	3,102	31.9%	288	
1-Person	2,755	28.3%	276	
2-Person	306	3.1%	84	
3-Person	39	0.4%	18	
4-Person	3	0.0%	3	
5-Person	0	0.0%	0	
6-Person	0	0.0%	0	
7+ Person	0	0.0%	0	
HOUSEHOLDS BY PRESENCE OF PEOPLE UNDER 18 YEARS BY HOUSEHOLD TYPE				
Households with one or more people under 18 years	2,902	29.8%	265	
Family households	2,885	29.7%	265	
Married-couple family	2,035	20.9%	220	
Male householder, no wife present	328	3.4%	114	
Female householder, no husband present	523	5.4%	117	
Nonfamily households	17	0.2%	11	
Households with no people under 18 years	6,820	70.2%	347	
Married-couple family	3,366	34.6%	232	
Other family	368	3.8%	100	
Nonfamily households	3,085	31.7%	288	
HOUSEHOLDS BY PRESENCE OF PEOPLE 65 YEARS AND OVER, HOUSEHOLD SIZE AND HOUSEHOLD TYPE				
Households with Pop 65+	2,946	30.3%	218	
1-Person	1,094	11.3%	164	
2+ Person Family	1,785	18.4%	171	
2+ Person Nonfamily	67	0.7%	42	
Households with No Pop 65+	6,776	69.7%	358	
1-Person	1,660	17.1%	234	
2+ Person Family	4,835	49.7%	305	
2+ Person Nonfamily	281	2.9%	81	

ACS Population Summary

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
POPULATION AGE 5+ YEARS BY LANGUAGE SPOKEN AT HOME AND ABILITY TO SPEAK ENGLISH				
Total	27,286	100.0%	1,131	
5 to 17 years				
Speak only English	4,605	16.9%	457	
Speak Spanish	33	0.1%	32	
Speak English "very well" or "well"	33	0.1%	32	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other Indo-European languages	325	1.2%	96	
Speak English "very well" or "well"	310	1.1%	83	
Speak English "not well"	10	0.0%	4	
Speak English "not at all"	5	0.0%	6	
Speak Asian and Pacific Island languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
18 to 64 years				
Speak only English	17,092	62.6%	861	
Speak Spanish	205	0.8%	90	
Speak English "very well" or "well"	198	0.7%	89	
Speak English "not well"	7	0.0%	7	
Speak English "not at all"	0	0.0%	0	
Speak other Indo-European languages	390	1.4%	137	
Speak English "very well" or "well"	362	1.3%	130	
Speak English "not well"	28	0.1%	26	
Speak English "not at all"	0	0.0%	0	
Speak Asian and Pacific Island languages	86	0.3%	52	
Speak English "very well" or "well"	62	0.2%	43	
Speak English "not well"	24	0.1%	32	
Speak English "not at all"	0	0.0%	0	
Speak other languages	1	0.0%	3	
Speak English "very well" or "well"	1	0.0%	3	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
65 years and over				
Speak only English	4,446	16.3%	326	
Speak Spanish	35	0.1%	40	
Speak English "very well" or "well"	35	0.1%	40	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other Indo-European languages	53	0.2%	24	
Speak English "very well" or "well"	53	0.2%	24	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak Asian and Pacific Island languages	15	0.1%	23	
Speak English "very well" or "well"	15	0.1%	23	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	
Speak other languages	0	0.0%	0	
Speak English "very well" or "well"	0	0.0%	0	
Speak English "not well"	0	0.0%	0	
Speak English "not at all"	0	0.0%	0	

Source: U.S. Census Bureau, 2013-2017 American Community Survey

Reliability:  high  medium  low

June 28, 2019

ACS Population Summary

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
WORKERS AGE 16+ YEARS BY PLACE OF WORK				
Total	11,725	100.0%	674	
Worked in state and in county of residence	8,052	68.7%	516	
Worked in state and outside county of residence	3,543	30.2%	345	
Worked outside state of residence	129	1.1%	53	
SEX BY CLASS OF WORKER FOR THE CIVILIAN EMPLOYED POPULATION 16 YEARS AND OVER				
Total:	11,864	100.0%	678	
Male:	6,001	50.6%	388	
Employee of private company	4,043	34.1%	340	
Self-employed in own incorporated business	161	1.4%	49	
Private not-for-profit wage and salary workers	294	2.5%	95	
Local government workers	438	3.7%	108	
State government workers	319	2.7%	116	
Federal government workers	207	1.7%	81	
Self-employed in own not incorporated business workers	527	4.4%	116	
Unpaid family workers	12	0.1%	10	
Female:	5,862	49.4%	428	
Employee of private company	3,887	32.8%	359	
Self-employed in own incorporated business	54	0.5%	39	
Private not-for-profit wage and salary workers	581	4.9%	125	
Local government workers	411	3.5%	96	
State government workers	413	3.5%	100	
Federal government workers	122	1.0%	63	
Self-employed in own not incorporated business workers	381	3.2%	120	
Unpaid family workers	13	0.1%	14	

ACS Population Summary

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
WORKERS AGE 16+ YEARS BY MEANS OF TRANSPORTATION TO WORK				
Total	11,725	100.0%	674	
Drove alone	9,722	82.9%	620	
Carpooled	1,084	9.2%	214	
Public transportation (excluding taxicab)	24	0.2%	18	
Bus or trolley bus	24	0.2%	18	
Streetcar or trolley car	0	0.0%	0	
Subway or elevated	0	0.0%	0	
Railroad	0	0.0%	0	
Ferryboat	0	0.0%	0	
Taxicab	17	0.1%	20	
Motorcycle	21	0.2%	24	
Bicycle	0	0.0%	0	
Walked	235	2.0%	99	
Other means	124	1.1%	39	
Worked at home	498	4.2%	110	
WORKERS AGE 16+ YEARS (WHO DID NOT WORK FROM HOME) BY TRAVEL TIME TO WORK				
Total	11,227	100.0%	662	
Less than 5 minutes	364	3.2%	83	
5 to 9 minutes	2,020	18.0%	312	
10 to 14 minutes	2,393	21.3%	329	
15 to 19 minutes	1,711	15.2%	233	
20 to 24 minutes	1,049	9.3%	130	
25 to 29 minutes	273	2.4%	81	
30 to 34 minutes	930	8.3%	156	
35 to 39 minutes	392	3.5%	138	
40 to 44 minutes	698	6.2%	178	
45 to 59 minutes	900	8.0%	183	
60 to 89 minutes	353	3.1%	111	
90 or more minutes	143	1.3%	46	
Average Travel Time to Work (in minutes)	N/A		N/A	
FEMALES AGE 20-64 YEARS BY AGE OF OWN CHILDREN AND EMPLOYMENT STATUS				
Total	7,685	100.0%	506	
Own children under 6 years only	682	8.9%	188	
In labor force	550	7.2%	183	
Not in labor force	132	1.7%	61	
Own children under 6 years and 6 to 17 years	493	6.4%	111	
In labor force	377	4.9%	90	
Not in labor force	116	1.5%	59	
Own children 6 to 17 years only	1,400	18.2%	180	
In labor force	1,148	14.9%	164	
Not in labor force	252	3.3%	76	
No own children under 18 years	5,110	66.5%	456	
In labor force	3,440	44.8%	335	
Not in labor force	1,670	21.7%	315	

ACS Population Summary

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
CIVILIAN NONINSTITUTIONALIZED POPULATION BY AGE & TYPES OF HEALTH INSURANCE COVERAGE				
Total	27,054	100.0%	1,248	
Under 19 years:	7,129	26.4%	609	
One Type of Health Insurance:	6,253	23.1%	590	
Employer-Based Health Ins Only	3,772	13.9%	439	
Direct-Purchase Health Ins Only	369	1.4%	104	
Medicare Coverage Only	0	0.0%	0	
Medicaid Coverage Only	2,035	7.5%	386	
TRICARE/Military Hlth Cov Only	76	0.3%	59	
VA Health Care Only	0	0.0%	0	
2+ Types of Health Insurance	273	1.0%	106	
No Health Insurance Coverage	603	2.2%	130	
19 to 34 years:	5,169	19.1%	552	
One Type of Health Insurance:	3,475	12.8%	464	
Employer-Based Health Ins Only	2,214	8.2%	306	
Direct-Purchase Health Ins Only	456	1.7%	150	
Medicare Coverage Only	23	0.1%	26	
Medicaid Coverage Only	757	2.8%	312	
TRICARE/Military Hlth Cov Only	25	0.1%	25	
VA Health Care Only	0	0.0%	0	
2+ Types of Health Insurance	412	1.5%	153	
No Health Insurance Coverage	1,282	4.7%	267	
35 to 64 years:	10,445	38.6%	554	
One Type of Health Insurance:	8,232	30.4%	488	
Employer-Based Health Ins Only	6,283	23.2%	425	
Direct-Purchase Health Ins Only	769	2.8%	146	
Medicare Coverage Only	362	1.3%	115	
Medicaid Coverage Only	581	2.1%	185	
TRICARE/Military Hlth Cov Only	146	0.5%	101	
VA Health Care Only	91	0.3%	37	
2+ Types of Health Insurance	950	3.5%	156	
No Health Insurance Coverage	1,263	4.7%	220	
65+ years:	4,310	15.9%	319	
One Type of Health Insurance:	1,082	4.0%	163	
Employer-Based Health Ins Only	53	0.2%	33	
Direct-Purchase Health Ins Only	22	0.1%	25	
Medicare Coverage Only	1,007	3.7%	158	
TRICARE/Military Hlth Cov Only	0	0.0%	0	
VA Health Care Only	0	0.0%	0	
2+ Types of Health Insurance:	3,163	11.7%	292	
Employer-Based & Direct-Purchase Health Insurance	3	0.0%	4	
Employer-Based Health & Medicare Insurance	572	2.1%	102	
Direct-Purchase Health & Medicare Insurance	1,162	4.3%	170	
Medicare & Medicaid Coverage	322	1.2%	115	
Other Private Health Insurance Combos	0	0.0%	0	
Other Public Health Insurance Combos	246	0.9%	112	
Other Health Insurance Combinations	857	3.2%	144	
No Health Insurance Coverage	66	0.2%	48	

ACS Population Summary

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group

Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
POPULATION BY RATIO OF INCOME TO POVERTY LEVEL				
Total	26,844	100.0%	1,235	
Under .50	1,530	5.7%	311	
.50 to .99	3,109	11.6%	567	
1.00 to 1.24	1,411	5.3%	423	
1.25 to 1.49	1,662	6.2%	339	
1.50 to 1.84	2,070	7.7%	390	
1.85 to 1.99	880	3.3%	298	
2.00 and over	16,183	60.3%	956	
CIVILIAN POPULATION AGE 18 OR OLDER BY VETERAN STATUS				
Total	22,318	100.0%	913	
Veteran	2,094	9.4%	234	
Nonveteran	20,224	90.6%	869	
Male	11,625	52.1%	549	
Veteran	2,006	9.0%	227	
Nonveteran	9,619	43.1%	519	
Female	10,693	47.9%	561	
Veteran	88	0.4%	45	
Nonveteran	10,605	47.5%	561	
CIVILIAN VETERANS AGE 18 OR OLDER BY PERIOD OF MILITARY SERVICE				
Total	2,094	100.0%	234	
Gulf War (9/01 or later), no Gulf War (8/90 to 8/01), no Vietnam Era	113	5.4%	53	
Gulf War (9/01 or later) and Gulf War (8/90 to 8/01), no Vietnam Era	145	6.9%	70	
Gulf War (9/01 or later), and Gulf War (8/90 to 8/01), and Vietnam Era	6	0.3%	7	
Gulf War (8/90 to 8/01), no Vietnam Era	232	11.1%	85	
Gulf War (8/90 to 8/01) and Vietnam Era	15	0.7%	15	
Vietnam Era, no Korean War, no World War II	705	33.7%	142	
Vietnam Era and Korean War, no World War II	12	0.6%	10	
Vietnam Era and Korean War and World War II	0	0.0%	0	
Korean War, no Vietnam Era, no World War II	181	8.6%	63	
Korean War and World War II, no Vietnam Era	10	0.5%	10	
World War II, no Korean War, no Vietnam Era	84	4.0%	58	
Between Gulf War and Vietnam Era only	443	21.2%	115	
Between Vietnam Era and Korean War only	142	6.8%	38	
Between Korean War and World War II only	6	0.3%	8	
Pre-World War II only	0	0.0%	0	
HOUSEHOLDS BY POVERTY STATUS				
Total	9,722	100.0%	381	
Income in the past 12 months below poverty level	1,583	16.3%	223	
Married-couple family	378	3.9%	98	
Other family - male householder (no wife present)	83	0.9%	80	
Other family - female householder (no husband present)	343	3.5%	106	
Nonfamily household - male householder	315	3.2%	112	
Nonfamily household - female householder	464	4.8%	129	
Income in the past 12 months at or above poverty level	8,139	83.7%	334	
Married-couple family	5,023	51.7%	276	
Other family - male householder (no wife present)	341	3.5%	89	
Other family - female householder (no husband present)	452	4.6%	103	
Nonfamily household - male householder	1,069	11.0%	167	
Nonfamily household - female householder	1,254	12.9%	182	

ACS Population Summary

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	2013 - 2017 ACS Estimate	Percent	MOE(±)	Reliability
HOUSEHOLDS BY OTHER INCOME				
Social Security Income	3,563	36.6%	251	High
No Social Security Income	6,159	63.4%	343	High
Retirement Income	1,834	18.9%	188	High
No Retirement Income	7,888	81.1%	389	High
GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME IN THE PAST 12 MONTHS				
<10% of Income	79	3.5%	41	Medium
10-14.9% of Income	308	13.5%	109	Medium
15-19.9% of Income	248	10.8%	92	Medium
20-24.9% of Income	195	8.5%	74	Medium
25-29.9% of Income	216	9.4%	93	Medium
30-34.9% of Income	130	5.7%	59	Medium
35-39.9% of Income	123	5.4%	51	Medium
40-49.9% of Income	215	9.4%	94	Medium
50+% of Income	580	25.4%	147	Medium
Gross Rent % Inc Not Computed	192	8.4%	66	Medium
HOUSEHOLDS BY PUBLIC ASSISTANCE INCOME IN THE PAST 12 MONTHS				
Total	9,722	100.0%	381	High
With public assistance income	205	2.1%	70	Medium
No public assistance income	9,517	97.9%	381	High
HOUSEHOLDS BY FOOD STAMPS/SNAP STATUS				
Total	9,722	100.0%	381	High
With Food Stamps/SNAP	1,205	12.4%	195	High
With No Food Stamps/SNAP	8,517	87.6%	352	High
HOUSEHOLDS BY DISABILITY STATUS				
Total	9,722	100.0%	381	High
With 1+ Persons w/Disability	3,119	32.1%	272	High
With No Person w/Disability	6,603	67.9%	355	High

Data Note: N/A means not available. Population by Ratio of Income to Poverty Level represents persons for whom poverty status is determined. Household income represents income in 2015, adjusted for inflation.

2013-2017 ACS Estimate: The American Community Survey (ACS) replaces census sample data. Esri is releasing the 2013-2017 ACS estimates, five-year period data collected monthly from January 1, 2011 through December 31, 2015. Although the ACS includes many of the subjects previously covered by the decennial census sample, there are significant differences between the two surveys including fundamental differences in survey design and residency rules.

Margin of error (MOE): The MOE is a measure of the variability of the estimate due to sampling error. MOEs enable the data user to measure the range of uncertainty for each estimate with 90 percent confidence. The range of uncertainty is called the confidence interval, and it is calculated by taking the estimate +/- the MOE. For example, if the ACS reports an estimate of 100 with an MOE of +/- 20, then you can be 90 percent certain the value for the whole population falls between 80 and 120.

Reliability: These symbols represent threshold values that Esri has established from the Coefficients of Variation (CV) to designate the usability of the estimates. The CV measures the amount of sampling error relative to the size of the estimate, expressed as a percentage.

-  High Reliability: Small CVs (less than or equal to 12 percent) are flagged green to indicate that the sampling error is small relative to the estimate and the estimate is reasonably reliable.
-  Medium Reliability: Estimates with CVs between 12 and 40 are flagged yellow-use with caution.
-  Low Reliability: Large CVs (over 40 percent) are flagged red to indicate that the sampling error is large relative to the estimate. The estimate is considered very unreliable.



Business Summary

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

Data for all businesses in area				5 miles		10 miles				15 miles			
Total Businesses:				819		962				1,059			
Total Employees:				9,776		11,075				12,082			
Total Residential Population:				17,072		23,517				29,280			
Employee/Residential Population Ratio (per 100 Residents)				57		47				41			
by SIC Codes	Businesses		Employees		Businesses		Employees		Businesses		Employees		
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	
Agriculture & Mining	11	1.3%	49	0.5%	20	2.1%	87	0.8%	30	2.8%	120	1.0%	
Construction	43	5.3%	344	3.5%	55	5.7%	452	4.1%	68	6.4%	700	5.8%	
Manufacturing	24	2.9%	990	10.1%	30	3.1%	1,030	9.3%	33	3.1%	1,076	8.9%	
Transportation	24	2.9%	204	2.1%	34	3.5%	245	2.2%	41	3.9%	293	2.4%	
Communication	12	1.5%	203	2.1%	12	1.2%	204	1.8%	12	1.1%	204	1.7%	
Utility	2	0.2%	57	0.6%	4	0.4%	192	1.7%	7	0.7%	542	4.5%	
Wholesale Trade	35	4.3%	636	6.5%	40	4.2%	707	6.4%	45	4.2%	725	6.0%	
Retail Trade Summary	197	24.1%	2,010	20.6%	217	22.6%	2,144	19.4%	229	21.6%	2,191	18.1%	
Home Improvement	11	1.3%	207	2.1%	12	1.2%	216	2.0%	13	1.2%	219	1.8%	
General Merchandise Stores	10	1.2%	404	4.1%	11	1.1%	426	3.8%	13	1.2%	435	3.6%	
Food Stores	18	2.2%	132	1.4%	21	2.2%	158	1.4%	22	2.1%	168	1.4%	
Auto Dealers, Gas Stations, Auto Aftermarket	31	3.8%	281	2.9%	35	3.6%	300	2.7%	38	3.6%	305	2.5%	
Apparel & Accessory Stores	10	1.2%	54	0.6%	10	1.0%	54	0.5%	10	0.9%	54	0.4%	
Furniture & Home Furnishings	17	2.1%	101	1.0%	19	2.0%	115	1.0%	19	1.8%	116	1.0%	
Eating & Drinking Places	41	5.0%	505	5.2%	45	4.7%	529	4.8%	47	4.4%	540	4.5%	
Miscellaneous Retail	58	7.1%	326	3.3%	64	6.7%	346	3.1%	67	6.3%	354	2.9%	
Finance, Insurance, Real Estate Summary	89	10.9%	700	7.2%	96	10.0%	780	7.0%	102	9.6%	801	6.6%	
Banks, Savings & Lending Institutions	32	3.9%	470	4.8%	34	3.5%	540	4.9%	35	3.3%	549	4.5%	
Securities Brokers	5	0.6%	13	0.1%	5	0.5%	13	0.1%	6	0.6%	14	0.1%	
Insurance Carriers & Agents	27	3.3%	84	0.9%	28	2.9%	87	0.8%	30	2.8%	91	0.8%	
Real Estate, Holding, Other Investment Offices	25	3.1%	134	1.4%	28	2.9%	139	1.3%	30	2.8%	147	1.2%	
Services Summary	316	38.6%	4,184	42.8%	367	38.1%	4,670	42.2%	398	37.6%	4,853	40.2%	
Hotels & Lodging	4	0.5%	62	0.6%	5	0.5%	63	0.6%	6	0.6%	65	0.5%	
Automotive Services	32	3.9%	86	0.9%	37	3.8%	97	0.9%	40	3.8%	102	0.8%	
Motion Pictures & Amusements	11	1.3%	27	0.3%	13	1.4%	36	0.3%	15	1.4%	47	0.4%	
Health Services	53	6.5%	1,081	11.1%	54	5.6%	1,099	9.9%	55	5.2%	1,103	9.1%	
Legal Services	12	1.5%	31	0.3%	13	1.4%	32	0.3%	13	1.2%	32	0.3%	
Education Institutions & Libraries	22	2.7%	1,293	13.2%	35	3.6%	1,644	14.8%	39	3.7%	1,752	14.5%	
Other Services	180	22.0%	1,604	16.4%	209	21.7%	1,698	15.3%	230	21.7%	1,752	14.5%	
Government	37	4.5%	387	4.0%	54	5.6%	551	5.0%	57	5.4%	561	4.6%	
Unclassified Establishments	29	3.5%	13	0.1%	33	3.4%	14	0.1%	38	3.6%	18	0.1%	
Totals	819	100.0%	9,776	100.0%	962	100.0%	11,075	100.0%	1,059	100.0%	12,082	100.0%	

Source: Copyright 2019 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2019.

Date Note: Data on the Business Summary report is calculated using **Esri's Data allocation method** which uses census block groups to allocate business summary data to custom areas.

June 27, 2019

Business Summary

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

by NAICS Codes	Businesses		Employees		Businesses		Employees		Businesses		Employees	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	6	0.7%	20	0.2%	12	1.2%	44	0.4%	21	2.0%	68	0.6%
Mining	1	0.1%	6	0.1%	2	0.2%	11	0.1%	2	0.2%	17	0.1%
Utilities	1	0.1%	7	0.1%	3	0.3%	140	1.3%	5	0.5%	469	3.9%
Construction	46	5.6%	350	3.6%	58	6.0%	460	4.2%	71	6.7%	709	5.9%
Manufacturing	25	3.1%	986	10.1%	31	3.2%	1,027	9.3%	34	3.2%	1,071	8.9%
Wholesale Trade	35	4.3%	636	6.5%	40	4.2%	707	6.4%	45	4.2%	725	6.0%
Retail Trade	150	18.3%	1,485	15.2%	166	17.3%	1,594	14.4%	176	16.6%	1,630	13.5%
Motor Vehicle & Parts Dealers	27	3.3%	262	2.7%	31	3.2%	281	2.5%	34	3.2%	285	2.4%
Furniture & Home Furnishings Stores	8	1.0%	28	0.3%	9	0.9%	29	0.3%	9	0.8%	29	0.2%
Electronics & Appliance Stores	8	1.0%	72	0.7%	10	1.0%	88	0.8%	10	0.9%	89	0.7%
Bldg Material & Garden Equipment & Supplies Dealers	11	1.3%	207	2.1%	12	1.2%	216	2.0%	13	1.2%	219	1.8%
Food & Beverage Stores	18	2.2%	126	1.3%	21	2.2%	152	1.4%	22	2.1%	162	1.3%
Health & Personal Care Stores	11	1.3%	101	1.0%	11	1.1%	102	0.9%	11	1.0%	102	0.8%
Gasoline Stations	4	0.5%	19	0.2%	4	0.4%	19	0.2%	4	0.4%	20	0.2%
Clothing & Clothing Accessories Stores	12	1.5%	59	0.6%	12	1.2%	59	0.5%	12	1.1%	59	0.5%
Sport Goods, Hobby, Book, & Music Stores	9	1.1%	33	0.3%	11	1.1%	39	0.4%	13	1.2%	46	0.4%
General Merchandise Stores	10	1.2%	404	4.1%	11	1.1%	426	3.8%	13	1.2%	435	3.6%
Miscellaneous Store Retailers	28	3.4%	144	1.5%	30	3.1%	152	1.4%	30	2.8%	153	1.3%
Nonstore Retailers	3	0.4%	30	0.3%	4	0.4%	31	0.3%	4	0.4%	31	0.3%
Transportation & Warehousing	16	2.0%	167	1.7%	26	2.7%	207	1.9%	33	3.1%	255	2.1%
Information	21	2.6%	284	2.9%	22	2.3%	287	2.6%	23	2.2%	289	2.4%
Finance & Insurance	66	8.1%	569	5.8%	70	7.3%	643	5.8%	74	7.0%	657	5.4%
Central Bank/Credit Intermediation & Related Activities	34	4.2%	473	4.8%	36	3.7%	543	4.9%	37	3.5%	552	4.6%
Securities, Commodity Contracts & Other Financial	5	0.6%	13	0.1%	5	0.5%	13	0.1%	6	0.6%	14	0.1%
Insurance Carriers & Related Activities; Funds, Trusts &	27	3.3%	84	0.9%	28	2.9%	87	0.8%	30	2.8%	91	0.8%
Real Estate, Rental & Leasing	38	4.6%	212	2.2%	40	4.2%	216	2.0%	41	3.9%	224	1.9%
Professional, Scientific & Tech Services	51	6.2%	197	2.0%	57	5.9%	214	1.9%	59	5.6%	221	1.8%
Legal Services	14	1.7%	39	0.4%	15	1.6%	40	0.4%	15	1.4%	40	0.3%
Management of Companies & Enterprises	2	0.2%	6	0.1%	2	0.2%	6	0.1%	2	0.2%	6	0.0%
Administrative & Support & Waste Management & Remediation	24	2.9%	695	7.1%	28	2.9%	715	6.5%	32	3.0%	743	6.1%
Educational Services	25	3.1%	1,295	13.2%	38	4.0%	1,646	14.9%	42	4.0%	1,753	14.5%
Health Care & Social Assistance	81	9.9%	1,397	14.3%	86	8.9%	1,444	13.0%	89	8.4%	1,459	12.1%
Arts, Entertainment & Recreation	4	0.5%	6	0.1%	5	0.5%	14	0.1%	7	0.7%	25	0.2%
Accommodation & Food Services	47	5.7%	576	5.9%	52	5.4%	601	5.4%	55	5.2%	614	5.1%
Accommodation	4	0.5%	62	0.6%	5	0.5%	63	0.6%	6	0.6%	65	0.5%
Food Services & Drinking Places	43	5.3%	514	5.3%	47	4.9%	538	4.9%	49	4.6%	549	4.5%
Other Services (except Public Administration)	114	13.9%	482	4.9%	136	14.1%	534	4.8%	154	14.5%	570	4.7%
Automotive Repair & Maintenance	26	3.2%	71	0.7%	31	3.2%	81	0.7%	34	3.2%	86	0.7%
Public Administration	37	4.5%	387	4.0%	54	5.6%	551	5.0%	57	5.4%	561	4.6%
Unclassified Establishments	29	3.5%	13	0.1%	33	3.4%	14	0.1%	38	3.6%	18	0.1%
Total	819	100.0%	9,776	100.0%	962	100.0%	11,075	100.0%	1,059	100.0%	12,082	100.0%

Source: Copyright 2019 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2019.

Date Note: Data on the Business Summary report is calculated using **Esri's Data allocation method** which uses census block groups to allocate business summary data to custom areas.

June 27, 2019



Business Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Data for all businesses in area		Moberly city,...			
Total Businesses:		738			
Total Employees:		9,332			
Total Residential Population:		13,876			
Employee/Residential Population Ratio (per 100 Residents)		67			
by SIC Codes		Businesses		Employees	
		Number	Percent	Number	Percent
Agriculture & Mining		7	0.9%	28	0.3%
Construction		38	5.1%	332	3.6%
Manufacturing		23	3.1%	986	10.6%
Transportation		18	2.4%	160	1.7%
Communication		10	1.4%	194	2.1%
Utility		2	0.3%	57	0.6%
Wholesale Trade		27	3.7%	545	5.8%
Retail Trade Summary		181	24.5%	1,872	20.1%
Home Improvement		11	1.5%	203	2.2%
General Merchandise Stores		10	1.4%	419	4.5%
Food Stores		16	2.2%	99	1.1%
Auto Dealers, Gas Stations, Auto Aftermarket		27	3.7%	246	2.6%
Apparel & Accessory Stores		10	1.4%	54	0.6%
Furniture & Home Furnishings		15	2.0%	67	0.7%
Eating & Drinking Places		41	5.6%	502	5.4%
Miscellaneous Retail		51	6.9%	282	3.0%
Finance, Insurance, Real Estate Summary		88	11.9%	763	8.2%
Banks, Savings & Lending Institutions		33	4.5%	537	5.8%
Securities Brokers		5	0.7%	13	0.1%
Insurance Carriers & Agents		26	3.5%	83	0.9%
Real Estate, Holding, Other Investment Offices		24	3.3%	130	1.4%
Services Summary		286	38.8%	4,042	43.3%
Hotels & Lodging		3	0.4%	58	0.6%
Automotive Services		26	3.5%	69	0.7%
Motion Pictures & Amusements		10	1.4%	24	0.3%
Health Services		51	6.9%	1,060	11.4%
Legal Services		12	1.6%	31	0.3%
Education Institutions & Libraries		20	2.7%	1,247	13.4%
Other Services		164	22.2%	1,553	16.6%
Government		32	4.3%	340	3.6%
Unclassified Establishments		26	3.5%	13	0.1%
Totals		738	100.0%	9,332	100.0%

Source: Copyright 2019 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2019.

Date Note: Data on the Business Summary report is calculated using **Esri's Data allocation method** which uses census block groups to allocate business summary data to custom areas.

June 27, 2019

Business Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	3	0.4%	12	0.1%
Mining	1	0.1%	5	0.1%
Utilities	1	0.1%	7	0.1%
Construction	40	5.4%	337	3.6%
Manufacturing	24	3.3%	983	10.5%
Wholesale Trade	27	3.7%	545	5.8%
Retail Trade	134	18.2%	1,349	14.5%
Motor Vehicle & Parts Dealers	23	3.1%	227	2.4%
Furniture & Home Furnishings Stores	7	0.9%	22	0.2%
Electronics & Appliance Stores	7	0.9%	43	0.5%
Bldg Material & Garden Equipment & Supplies Dealers	11	1.5%	203	2.2%
Food & Beverage Stores	16	2.2%	93	1.0%
Health & Personal Care Stores	11	1.5%	102	1.1%
Gasoline Stations	4	0.5%	19	0.2%
Clothing & Clothing Accessories Stores	12	1.6%	59	0.6%
Sport Goods, Hobby, Book, & Music Stores	7	0.9%	28	0.3%
General Merchandise Stores	10	1.4%	419	4.5%
Miscellaneous Store Retailers	25	3.4%	134	1.4%
Nonstore Retailers	1	0.1%	0	0.0%
Transportation & Warehousing	12	1.6%	152	1.6%
Information	19	2.6%	275	2.9%
Finance & Insurance	66	8.9%	636	6.8%
Central Bank/Credit Intermediation & Related Activities	35	4.7%	540	5.8%
Securities, Commodity Contracts & Other Financial	5	0.7%	13	0.1%
Insurance Carriers & Related Activities; Funds, Trusts &	26	3.5%	83	0.9%
Real Estate, Rental & Leasing	34	4.6%	204	2.2%
Professional, Scientific & Tech Services	45	6.1%	164	1.8%
Legal Services	14	1.9%	39	0.4%
Management of Companies & Enterprises	1	0.1%	2	0.0%
Administrative & Support & Waste Management & Remediation	22	3.0%	692	7.4%
Educational Services	22	3.0%	1,247	13.4%
Health Care & Social Assistance	75	10.2%	1,339	14.3%
Arts, Entertainment & Recreation	4	0.5%	6	0.1%
Accommodation & Food Services	46	6.2%	569	6.1%
Accommodation	3	0.4%	58	0.6%
Food Services & Drinking Places	43	5.8%	511	5.5%
Other Services (except Public Administration)	104	14.1%	455	4.9%
Automotive Repair & Maintenance	22	3.0%	60	0.6%
Public Administration	32	4.3%	340	3.6%
Unclassified Establishments	26	3.5%	13	0.1%
Total	738	100.0%	9,332	100.0%

Source: Copyright 2019 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2019.

Date Note: Data on the Business Summary report is calculated using **Esri's Data allocation method** which uses census block groups to allocate business summary data to custom areas.

June 27, 2019

Community Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	Moberly city,...
Population Summary	
2000 Total Population	13,655
2010 Total Population	14,019
2019 Total Population	13,876
2019 Group Quarters	1,683
2024 Total Population	13,707
2019-2024 Annual Rate	-0.24%
2019 Total Daytime Population	15,356
Workers	7,984
Residents	7,372
Household Summary	
2000 Households	4,988
2000 Average Household Size	2.43
2010 Households	4,973
2010 Average Household Size	2.35
2019 Households	4,897
2019 Average Household Size	2.49
2024 Households	4,823
2024 Average Household Size	2.49
2019-2024 Annual Rate	-0.30%
2010 Families	3,031
2010 Average Family Size	2.97
2019 Families	2,930
2019 Average Family Size	3.18
2024 Families	2,866
2024 Average Family Size	3.19
2019-2024 Annual Rate	-0.44%
Housing Unit Summary	
2000 Housing Units	5,806
Owner Occupied Housing Units	54.1%
Renter Occupied Housing Units	31.8%
Vacant Housing Units	14.1%
2010 Housing Units	5,699
Owner Occupied Housing Units	51.9%
Renter Occupied Housing Units	35.4%
Vacant Housing Units	12.7%
2019 Housing Units	5,650
Owner Occupied Housing Units	54.7%
Renter Occupied Housing Units	32.0%
Vacant Housing Units	13.3%
2024 Housing Units	5,623
Owner Occupied Housing Units	54.7%
Renter Occupied Housing Units	31.1%
Vacant Housing Units	14.2%
Median Household Income	
2019	\$39,315
2024	\$46,723
Median Home Value	
2019	\$93,391
2024	\$102,453
Per Capita Income	
2019	\$20,542
2024	\$23,524
Median Age	
2010	35.6
2019	37.2
2024	37.9

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019

Community Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

		Moberly city,...
2019 Households by Income		
Household Income Base		4,898
<\$15,000		19.7%
\$15,000 - \$24,999		14.5%
\$25,000 - \$34,999		11.5%
\$35,000 - \$49,999		12.3%
\$50,000 - \$74,999		17.4%
\$75,000 - \$99,999		11.2%
\$100,000 - \$149,999		10.1%
\$150,000 - \$199,999		1.9%
\$200,000+		1.4%
Average Household Income		\$53,880
2024 Households by Income		
Household Income Base		4,824
<\$15,000		16.6%
\$15,000 - \$24,999		13.0%
\$25,000 - \$34,999		10.2%
\$35,000 - \$49,999		12.4%
\$50,000 - \$74,999		18.2%
\$75,000 - \$99,999		12.7%
\$100,000 - \$149,999		12.6%
\$150,000 - \$199,999		2.7%
\$200,000+		1.7%
Average Household Income		\$62,049
2019 Owner Occupied Housing Units by Value		
Total		3,088
<\$50,000		20.7%
\$50,000 - \$99,999		33.8%
\$100,000 - \$149,999		19.8%
\$150,000 - \$199,999		11.7%
\$200,000 - \$249,999		7.6%
\$250,000 - \$299,999		3.0%
\$300,000 - \$399,999		2.3%
\$400,000 - \$499,999		0.6%
\$500,000 - \$749,999		0.4%
\$750,000 - \$999,999		0.0%
\$1,000,000 - \$1,499,999		0.0%
\$1,500,000 - \$1,999,999		0.0%
\$2,000,000 +		0.0%
Average Home Value		\$114,832
2024 Owner Occupied Housing Units by Value		
Total		3,076
<\$50,000		17.5%
\$50,000 - \$99,999		31.5%
\$100,000 - \$149,999		20.5%
\$150,000 - \$199,999		13.4%
\$200,000 - \$249,999		9.0%
\$250,000 - \$299,999		3.4%
\$300,000 - \$399,999		3.1%
\$400,000 - \$499,999		0.9%
\$500,000 - \$749,999		0.7%
\$750,000 - \$999,999		0.0%
\$1,000,000 - \$1,499,999		0.0%
\$1,500,000 - \$1,999,999		0.0%
\$2,000,000 +		0.0%
Average Home Value		\$125,813

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019

Community Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

		Moberly city,...
2010 Population by Age		
Total		14,019
0 - 4		6.4%
5 - 9		6.3%
10 - 14		6.0%
15 - 24		14.2%
25 - 34		16.1%
35 - 44		13.5%
45 - 54		13.6%
55 - 64		9.9%
65 - 74		6.2%
75 - 84		5.0%
85 +		2.7%
18 +		78.0%
2019 Population by Age		
Total		13,874
0 - 4		6.1%
5 - 9		6.2%
10 - 14		6.0%
15 - 24		13.7%
25 - 34		14.8%
35 - 44		13.5%
45 - 54		12.3%
55 - 64		11.2%
65 - 74		8.4%
75 - 84		5.0%
85 +		2.8%
18 +		78.4%
2024 Population by Age		
Total		13,704
0 - 4		6.0%
5 - 9		6.2%
10 - 14		6.2%
15 - 24		13.6%
25 - 34		13.9%
35 - 44		13.9%
45 - 54		12.2%
55 - 64		10.9%
65 - 74		8.8%
75 - 84		5.6%
85 +		2.6%
18 +		78.1%
2010 Population by Sex		
Males		7,532
Females		6,487
2019 Population by Sex		
Males		7,202
Females		6,672
2024 Population by Sex		
Males		7,155
Females		6,549

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019

Community Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

		Moberly city,...
2010 Population by Race/Ethnicity		
Total		14,019
White Alone		86.4%
Black Alone		9.7%
American Indian Alone		0.3%
Asian Alone		0.6%
Pacific Islander Alone		0.0%
Some Other Race Alone		0.3%
Two or More Races		2.6%
Hispanic Origin		2.1%
Diversity Index		27.5
2019 Population by Race/Ethnicity		
Total		13,875
White Alone		86.0%
Black Alone		8.2%
American Indian Alone		0.5%
Asian Alone		1.3%
Pacific Islander Alone		0.0%
Some Other Race Alone		0.4%
Two or More Races		3.5%
Hispanic Origin		2.7%
Diversity Index		29.2
2024 Population by Race/Ethnicity		
Total		13,707
White Alone		85.1%
Black Alone		8.0%
American Indian Alone		0.6%
Asian Alone		1.6%
Pacific Islander Alone		0.0%
Some Other Race Alone		0.5%
Two or More Races		4.2%
Hispanic Origin		3.1%
Diversity Index		31.3
2010 Population by Relationship and Household Type		
Total		14,019
In Households		83.3%
In Family Households		67.0%
Householder		21.6%
Spouse		14.2%
Child		26.1%
Other relative		2.2%
Nonrelative		2.8%
In Nonfamily Households		16.3%
In Group Quarters		16.7%
Institutionalized Population		14.6%
Noninstitutionalized Population		2.1%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019

Community Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

		Moberly city,...
2019 Population 25+ by Educational Attainment		
Total		9,434
Less than 9th Grade		5.3%
9th - 12th Grade, No Diploma		8.3%
High School Graduate		23.1%
GED/Alternative Credential		7.5%
Some College, No Degree		25.8%
Associate Degree		12.8%
Bachelor's Degree		10.8%
Graduate/Professional Degree		6.4%
2019 Population 15+ by Marital Status		
Total		11,332
Never Married		32.9%
Married		43.4%
Widowed		7.6%
Divorced		16.1%
2019 Civilian Population 16+ in Labor Force		
Civilian Employed		94.1%
Civilian Unemployed (Unemployment Rate)		5.9%
2019 Employed Population 16+ by Industry		
Total		5,300
Agriculture/Mining		0.6%
Construction		4.7%
Manufacturing		8.3%
Wholesale Trade		2.7%
Retail Trade		17.5%
Transportation/Utilities		7.2%
Information		1.2%
Finance/Insurance/Real Estate		6.8%
Services		46.2%
Public Administration		4.8%
2019 Employed Population 16+ by Occupation		
Total		5,300
White Collar		59.6%
Management/Business/Financial		13.0%
Professional		19.8%
Sales		10.4%
Administrative Support		16.5%
Services		19.6%
Blue Collar		20.8%
Farming/Forestry/Fishing		0.1%
Construction/Extraction		2.5%
Installation/Maintenance/Repair		4.6%
Production		6.0%
Transportation/Material Moving		7.5%
2010 Population By Urban/ Rural Status		
Total Population		14,019
Population Inside Urbanized Area		0.0%
Population Inside Urbanized Cluster		98.8%
Rural Population		1.2%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019

Community Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

		Moberly city,...
2010 Households by Type		
Total		4,973
Households with 1 Person		33.4%
Households with 2+ People		66.6%
Family Households		60.9%
Husband-wife Families		40.2%
With Related Children		16.8%
Other Family (No Spouse Present)		20.8%
Other Family with Male Householder		4.8%
With Related Children		3.3%
Other Family with Female Householder		15.9%
With Related Children		11.9%
Nonfamily Households		5.7%
All Households with Children		32.6%
Multigenerational Households		3.3%
Unmarried Partner Households		8.5%
Male-female		8.0%
Same-sex		0.4%
2010 Households by Size		
Total		4,973
1 Person Household		33.4%
2 Person Household		32.4%
3 Person Household		14.5%
4 Person Household		10.6%
5 Person Household		5.8%
6 Person Household		2.4%
7 + Person Household		1.0%
2010 Households by Tenure and Mortgage Status		
Total		4,973
Owner Occupied		59.5%
Owned with a Mortgage/Loan		36.6%
Owned Free and Clear		22.9%
Renter Occupied		40.5%
2010 Housing Units By Urban/ Rural Status		
Total Housing Units		5,699
Housing Units Inside Urbanized Area		0.0%
Housing Units Inside Urbanized Cluster		98.8%
Rural Housing Units		1.2%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019

Community Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

		Moberly city,...
Top 3 Tapestry Segments		
1.		Small Town Simplicity (12C)
2.		Traditional Living (12B)
3.		Hardscrabble Road (8G)
2019 Consumer Spending		
Apparel & Services: Total \$		\$6,478,490
Average Spent		\$1,322.95
Spending Potential Index		62
Education: Total \$		\$4,368,997
Average Spent		\$892.18
Spending Potential Index		56
Entertainment/Recreation: Total \$		\$10,406,346
Average Spent		\$2,125.05
Spending Potential Index		65
Food at Home: Total \$		\$16,728,694
Average Spent		\$3,416.11
Spending Potential Index		66
Food Away from Home: Total \$		\$11,189,550
Average Spent		\$2,284.98
Spending Potential Index		62
Health Care: Total \$		\$20,126,665
Average Spent		\$4,110.00
Spending Potential Index		69
HH Furnishings & Equipment: Total \$		\$6,526,509
Average Spent		\$1,332.76
Spending Potential Index		63
Personal Care Products & Services: Total \$		\$2,673,982
Average Spent		\$546.04
Spending Potential Index		62
Shelter: Total \$		\$54,096,851
Average Spent		\$11,046.94
Spending Potential Index		60
Support Payments/Cash Contributions/Gifts in Kind: Total \$		\$7,720,942
Average Spent		\$1,576.67
Spending Potential Index		64
Travel: Total \$		\$6,315,503
Average Spent		\$1,289.67
Spending Potential Index		57
Vehicle Maintenance & Repairs: Total \$		\$3,729,423
Average Spent		\$761.57
Spending Potential Index		67

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019

Community Profile

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	5 miles	10 miles	15 miles
Population Summary			
2000 Total Population	16,716	23,021	28,460
2010 Total Population	17,156	23,630	29,422
2019 Total Population	17,072	23,517	29,280
2019 Group Quarters	1,994	2,457	2,509
2024 Total Population	16,899	23,291	29,024
2019-2024 Annual Rate	-0.20%	-0.19%	-0.18%
2019 Total Daytime Population	17,543	22,238	26,676
Workers	8,416	9,333	10,462
Residents	9,127	12,905	16,214
Household Summary			
2000 Households	6,151	8,504	10,506
2000 Average Household Size	2.41	2.44	2.49
2010 Households	6,182	8,591	10,700
2010 Average Household Size	2.45	2.46	2.52
2019 Households	6,124	8,511	10,598
2019 Average Household Size	2.46	2.47	2.53
2024 Households	6,046	8,407	10,480
2024 Average Household Size	2.47	2.48	2.53
2019-2024 Annual Rate	-0.26%	-0.25%	-0.22%
2010 Families	3,945	5,690	7,256
2010 Average Family Size	3.04	2.99	3.04
2019 Families	3,852	5,561	7,095
2019 Average Family Size	3.05	3.01	3.05
2024 Families	3,780	5,463	6,980
2024 Average Family Size	3.06	3.02	3.06
2019-2024 Annual Rate	-0.38%	-0.35%	-0.33%
Housing Unit Summary			
2000 Housing Units	7,111	9,861	12,203
Owner Occupied Housing Units	58.0%	61.1%	63.2%
Renter Occupied Housing Units	28.5%	25.1%	22.9%
Vacant Housing Units	13.5%	13.8%	13.9%
2010 Housing Units	7,037	9,808	12,268
Owner Occupied Housing Units	56.7%	60.6%	63.0%
Renter Occupied Housing Units	31.2%	27.0%	24.2%
Vacant Housing Units	12.2%	12.4%	12.8%
2019 Housing Units	7,018	9,787	12,258
Owner Occupied Housing Units	59.2%	62.6%	64.4%
Renter Occupied Housing Units	28.1%	24.3%	22.1%
Vacant Housing Units	12.7%	13.0%	13.5%
2024 Housing Units	6,998	9,780	12,263
Owner Occupied Housing Units	59.1%	62.3%	64.0%
Renter Occupied Housing Units	27.3%	23.6%	21.5%
Vacant Housing Units	13.6%	14.0%	14.5%
Median Household Income			
2019	\$43,604	\$47,303	\$49,054
2024	\$51,113	\$53,284	\$54,303
Median Home Value			
2019	\$101,535	\$106,373	\$113,405
2024	\$116,799	\$123,705	\$130,660
Per Capita Income			
2019	\$21,197	\$21,686	\$22,081
2024	\$24,203	\$24,701	\$25,135
Median Age			
2010	36.8	37.6	37.8
2019	37.9	38.7	39.0
2024	38.6	39.5	39.8

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Community Profile

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	5 miles	10 miles	15 miles
2019 Households by Income			
Household Income Base	6,124	8,511	10,598
<\$15,000	17.3%	15.3%	14.1%
\$15,000 - \$24,999	13.3%	12.3%	11.8%
\$25,000 - \$34,999	11.7%	11.7%	11.6%
\$35,000 - \$49,999	12.1%	12.4%	13.1%
\$50,000 - \$74,999	18.9%	19.8%	19.9%
\$75,000 - \$99,999	12.6%	13.6%	14.4%
\$100,000 - \$149,999	10.7%	11.2%	11.3%
\$150,000 - \$199,999	1.9%	1.9%	2.1%
\$200,000+	1.6%	1.7%	1.7%
Average Household Income	\$57,089	\$59,198	\$60,423
2024 Households by Income			
Household Income Base	6,046	8,407	10,480
<\$15,000	14.5%	12.8%	11.7%
\$15,000 - \$24,999	11.8%	10.9%	10.4%
\$25,000 - \$34,999	10.4%	10.3%	10.2%
\$35,000 - \$49,999	12.0%	12.2%	12.8%
\$50,000 - \$74,999	19.4%	20.1%	20.1%
\$75,000 - \$99,999	14.0%	15.1%	15.9%
\$100,000 - \$149,999	13.2%	13.9%	14.0%
\$150,000 - \$199,999	2.7%	2.7%	2.8%
\$200,000+	2.0%	2.0%	2.1%
Average Household Income	\$65,458	\$67,660	\$68,969
2019 Owner Occupied Housing Units by Value			
Total	4,152	6,131	7,896
<\$50,000	18.4%	18.6%	18.1%
\$50,000 - \$99,999	31.0%	29.1%	27.0%
\$100,000 - \$149,999	19.2%	18.2%	18.4%
\$150,000 - \$199,999	12.9%	13.8%	14.5%
\$200,000 - \$249,999	9.5%	9.5%	9.2%
\$250,000 - \$299,999	4.6%	5.9%	6.5%
\$300,000 - \$399,999	2.7%	2.7%	3.5%
\$400,000 - \$499,999	0.6%	0.7%	1.0%
\$500,000 - \$749,999	1.0%	1.3%	1.4%
\$750,000 - \$999,999	0.0%	0.1%	0.2%
\$1,000,000 - \$1,499,999	0.0%	0.1%	0.2%
\$1,500,000 - \$1,999,999	0.0%	0.0%	0.1%
\$2,000,000 +	0.0%	0.0%	0.0%
Average Home Value	\$127,337	\$134,599	\$143,538
2024 Owner Occupied Housing Units by Value			
Total	4,137	6,096	7,848
<\$50,000	15.2%	15.0%	14.5%
\$50,000 - \$99,999	28.2%	26.1%	24.1%
\$100,000 - \$149,999	19.7%	18.7%	18.6%
\$150,000 - \$199,999	14.6%	15.6%	16.1%
\$200,000 - \$249,999	10.9%	10.9%	10.5%
\$250,000 - \$299,999	5.4%	7.0%	7.8%
\$300,000 - \$399,999	3.5%	3.5%	4.4%
\$400,000 - \$499,999	0.8%	0.9%	1.3%
\$500,000 - \$749,999	1.6%	2.1%	2.1%
\$750,000 - \$999,999	0.0%	0.2%	0.3%
\$1,000,000 - \$1,499,999	0.0%	0.1%	0.2%
\$1,500,000 - \$1,999,999	0.0%	0.0%	0.1%
\$2,000,000 +	0.0%	0.0%	0.0%
Average Home Value	\$140,973	\$149,906	\$159,428

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019



Community Profile

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	5 miles	10 miles	15 miles
2010 Population by Age			
Total	17,157	23,633	29,423
0 - 4	6.5%	6.3%	6.6%
5 - 9	6.6%	6.6%	6.9%
10 - 14	6.3%	6.6%	6.9%
15 - 24	13.7%	13.3%	12.9%
25 - 34	14.5%	13.9%	13.2%
35 - 44	13.1%	13.2%	13.0%
45 - 54	14.0%	14.4%	14.5%
55 - 64	10.9%	11.6%	11.8%
65 - 74	7.0%	7.3%	7.5%
75 - 84	4.9%	4.7%	4.6%
85 +	2.5%	2.2%	2.0%
18 +	77.1%	76.8%	75.7%
2019 Population by Age			
Total	17,072	23,516	29,279
0 - 4	5.9%	5.8%	6.1%
5 - 9	6.1%	6.1%	6.4%
10 - 14	6.0%	6.0%	6.3%
15 - 24	13.2%	12.7%	12.5%
25 - 34	14.7%	14.4%	13.6%
35 - 44	13.3%	13.0%	12.7%
45 - 54	12.6%	12.8%	12.8%
55 - 64	11.9%	12.6%	12.9%
65 - 74	8.8%	9.4%	9.7%
75 - 84	4.9%	4.9%	4.9%
85 +	2.5%	2.3%	2.1%
18 +	78.6%	78.8%	77.7%
2024 Population by Age			
Total	16,898	23,289	29,022
0 - 4	5.9%	5.7%	5.9%
5 - 9	6.1%	6.0%	6.2%
10 - 14	6.2%	6.2%	6.5%
15 - 24	13.2%	12.5%	12.4%
25 - 34	13.7%	13.5%	12.7%
35 - 44	13.7%	13.4%	12.9%
45 - 54	12.3%	12.4%	12.3%
55 - 64	11.5%	12.1%	12.4%
65 - 74	9.5%	10.2%	10.6%
75 - 84	5.7%	5.8%	5.9%
85 +	2.4%	2.2%	2.1%
18 +	78.4%	78.6%	77.6%
2010 Population by Sex			
Males	8,944	12,391	15,308
Females	8,212	11,239	14,114
2019 Population by Sex			
Males	8,973	12,417	15,331
Females	8,099	11,100	13,949
2024 Population by Sex			
Males	8,925	12,345	15,249
Females	7,974	10,946	13,775

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019



Community Profile

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	5 miles	10 miles	15 miles
2010 Population by Race/Ethnicity			
Total	17,156	23,631	29,421
White Alone	88.9%	90.6%	91.9%
Black Alone	7.5%	6.3%	5.2%
American Indian Alone	0.3%	0.3%	0.3%
Asian Alone	0.5%	0.4%	0.4%
Pacific Islander Alone	0.0%	0.0%	0.0%
Some Other Race Alone	0.3%	0.3%	0.3%
Two or More Races	2.4%	2.1%	2.0%
Hispanic Origin	1.9%	1.7%	1.5%
Diversity Index	23.3	20.3	17.9
2019 Population by Race/Ethnicity			
Total	17,072	23,519	29,281
White Alone	87.3%	89.1%	90.6%
Black Alone	7.4%	6.2%	5.1%
American Indian Alone	0.5%	0.5%	0.5%
Asian Alone	1.2%	1.0%	0.8%
Pacific Islander Alone	0.0%	0.0%	0.0%
Some Other Race Alone	0.4%	0.4%	0.4%
Two or More Races	3.2%	2.9%	2.7%
Hispanic Origin	2.5%	2.2%	2.0%
Diversity Index	26.9	23.6	21.0
2024 Population by Race/Ethnicity			
Total	16,898	23,292	29,024
White Alone	86.4%	88.3%	89.8%
Black Alone	7.2%	6.0%	5.0%
American Indian Alone	0.6%	0.5%	0.5%
Asian Alone	1.5%	1.2%	1.1%
Pacific Islander Alone	0.0%	0.0%	0.0%
Some Other Race Alone	0.5%	0.4%	0.4%
Two or More Races	3.8%	3.4%	3.2%
Hispanic Origin	2.8%	2.5%	2.3%
Diversity Index	28.9	25.4	22.7
2010 Population by Relationship and Household Type			
Total	17,156	23,630	29,422
In Households	88.4%	89.6%	91.5%
In Family Households	72.7%	74.9%	77.5%
Householder	23.6%	24.2%	24.8%
Spouse	16.5%	17.5%	18.6%
Child	27.5%	28.1%	29.3%
Other relative	2.2%	2.2%	2.2%
Nonrelative	2.9%	2.8%	2.6%
In Nonfamily Households	15.7%	14.7%	14.0%
In Group Quarters	11.6%	10.4%	8.5%
Institutionalized Population	9.9%	9.0%	7.3%
Noninstitutionalized Population	1.7%	1.4%	1.3%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019



Community Profile

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	5 miles	10 miles	15 miles
2019 Population 25+ by Educational Attainment			
Total	11,737	16,322	20,130
Less than 9th Grade	5.1%	4.6%	4.5%
9th - 12th Grade, No Diploma	8.7%	9.0%	8.9%
High School Graduate	24.6%	27.6%	29.2%
GED/Alternative Credential	7.8%	7.6%	6.9%
Some College, No Degree	24.8%	24.0%	23.6%
Associate Degree	12.6%	11.8%	11.2%
Bachelor's Degree	10.4%	9.7%	9.7%
Graduate/Professional Degree	6.2%	5.7%	5.9%
2019 Population 15+ by Marital Status			
Total	13,988	19,307	23,800
Never Married	31.7%	30.6%	29.4%
Married	45.9%	48.5%	50.8%
Widowed	6.9%	6.6%	6.4%
Divorced	15.5%	14.3%	13.3%
2019 Civilian Population 16+ in Labor Force			
Civilian Employed	94.6%	94.8%	95.0%
Civilian Unemployed (Unemployment Rate)	5.4%	5.2%	5.0%
2019 Employed Population 16+ by Industry			
Total	6,739	9,405	11,843
Agriculture/Mining	1.0%	1.3%	2.3%
Construction	5.8%	6.3%	6.7%
Manufacturing	8.0%	9.2%	10.2%
Wholesale Trade	2.8%	2.6%	2.6%
Retail Trade	16.8%	15.6%	14.4%
Transportation/Utilities	7.5%	8.5%	8.6%
Information	1.1%	1.0%	1.0%
Finance/Insurance/Real Estate	6.4%	6.3%	6.5%
Services	45.0%	42.6%	41.5%
Public Administration	5.6%	6.5%	6.2%
2019 Employed Population 16+ by Occupation			
Total	6,738	9,406	11,844
White Collar	59.0%	57.2%	56.9%
Management/Business/Financial	12.8%	12.1%	12.4%
Professional	19.6%	17.9%	17.4%
Sales	9.6%	9.1%	8.7%
Administrative Support	17.0%	18.0%	18.5%
Services	18.6%	17.7%	16.9%
Blue Collar	22.4%	25.1%	26.1%
Farming/Forestry/Fishing	0.1%	0.3%	0.7%
Construction/Extraction	3.2%	3.6%	4.0%
Installation/Maintenance/Repair	5.3%	5.3%	5.3%
Production	5.5%	6.7%	7.1%
Transportation/Material Moving	8.2%	9.2%	9.0%
2010 Population By Urban/ Rural Status			
Total Population	17,156	23,630	29,422
Population Inside Urbanized Area	0.0%	0.0%	0.0%
Population Inside Urbanized Cluster	79.1%	59.0%	47.4%
Rural Population	20.9%	41.0%	52.6%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019

Community Profile

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	5 miles	10 miles	15 miles
2010 Households by Type			
Total	6,182	8,591	10,700
Households with 1 Person	30.7%	28.4%	27.0%
Households with 2+ People	69.3%	71.6%	73.0%
Family Households	63.8%	66.2%	67.8%
Husband-wife Families	44.3%	47.9%	50.9%
With Related Children	18.1%	19.5%	20.8%
Other Family (No Spouse Present)	19.5%	18.4%	17.0%
Other Family with Male Householder	4.9%	5.0%	5.0%
With Related Children	3.3%	3.4%	3.3%
Other Family with Female Householder	14.7%	13.4%	12.0%
With Related Children	10.8%	9.7%	8.6%
Nonfamily Households	5.5%	5.3%	5.2%
All Households with Children	32.8%	33.2%	33.4%
Multigenerational Households	3.3%	3.3%	3.3%
Unmarried Partner Households	8.2%	8.1%	7.7%
Male-female	7.8%	7.7%	7.3%
Same-sex	0.4%	0.5%	0.5%
2010 Households by Size			
Total	6,181	8,593	10,700
1 Person Household	30.7%	28.4%	27.0%
2 Person Household	34.0%	35.0%	35.8%
3 Person Household	15.0%	15.3%	15.1%
4 Person Household	11.0%	11.6%	11.9%
5 Person Household	5.9%	6.2%	6.2%
6 Person Household	2.4%	2.4%	2.4%
7 + Person Household	1.0%	1.1%	1.6%
2010 Households by Tenure and Mortgage Status			
Total	6,182	8,591	10,700
Owner Occupied	64.5%	69.1%	72.3%
Owned with a Mortgage/Loan	39.3%	41.4%	42.5%
Owned Free and Clear	25.2%	27.7%	29.7%
Renter Occupied	35.5%	30.9%	27.7%
2010 Housing Units By Urban/ Rural Status			
Total Housing Units	7,037	9,808	12,268
Housing Units Inside Urbanized Area	0.0%	0.0%	0.0%
Housing Units Inside Urbanized Cluster	80.7%	58.0%	46.4%
Rural Housing Units	19.3%	42.0%	53.6%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Community Profile

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	5 miles	10 miles	15 miles
Top 3 Tapestry Segments			
1.	Small Town Simplicity (12C)	Small Town Simplicity (12C)	Southern Satellites (10A)
2.	Traditional Living (12B)	Southern Satellites (10A)	Small Town Simplicity (12C)
3.	Hardscrabble Road (8G)	Traditional Living (12B)	Rooted Rural (10B)
2019 Consumer Spending			
Apparel & Services: Total \$	\$8,548,693	\$12,243,803	\$15,453,265
Average Spent	\$1,395.93	\$1,438.59	\$1,458.13
Spending Potential Index	65	67	68
Education: Total \$	\$5,777,482	\$8,187,849	\$10,243,446
Average Spent	\$943.42	\$962.03	\$966.55
Spending Potential Index	59	60	61
Entertainment/Recreation: Total \$	\$13,822,114	\$20,142,003	\$25,812,701
Average Spent	\$2,257.04	\$2,366.58	\$2,435.62
Spending Potential Index	69	72	74
Food at Home: Total \$	\$22,160,678	\$32,189,209	\$41,062,639
Average Spent	\$3,618.66	\$3,782.07	\$3,874.56
Spending Potential Index	70	73	75
Food Away from Home: Total \$	\$14,819,582	\$21,342,314	\$27,065,491
Average Spent	\$2,419.92	\$2,507.62	\$2,553.83
Spending Potential Index	66	68	69
Health Care: Total \$	\$26,771,558	\$39,163,230	\$50,300,949
Average Spent	\$4,371.58	\$4,601.48	\$4,746.27
Spending Potential Index	74	78	80
HH Furnishings & Equipment: Total \$	\$8,635,475	\$12,428,295	\$15,804,238
Average Spent	\$1,410.10	\$1,460.26	\$1,491.25
Spending Potential Index	66	68	70
Personal Care Products & Services: Total \$	\$3,541,180	\$5,071,166	\$6,410,683
Average Spent	\$578.25	\$595.84	\$604.90
Spending Potential Index	65	67	68
Shelter: Total \$	\$70,739,559	\$99,851,338	\$125,660,816
Average Spent	\$11,551.20	\$11,732.03	\$11,857.03
Spending Potential Index	62	63	64
Support Payments/Cash Contributions/Gifts in Kind: Total \$	\$10,309,658	\$15,052,138	\$19,237,677
Average Spent	\$1,683.48	\$1,768.55	\$1,815.22
Spending Potential Index	68	71	73
Travel: Total \$	\$8,386,433	\$12,058,180	\$15,361,921
Average Spent	\$1,369.44	\$1,416.78	\$1,449.51
Spending Potential Index	61	63	65
Vehicle Maintenance & Repairs: Total \$	\$4,908,209	\$7,079,295	\$9,029,135
Average Spent	\$801.47	\$831.78	\$851.97
Spending Potential Index	70	73	74

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

June 26, 2019

Detailed Age Profile

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group

Latitude: 39.42796
Longitude: -92.43327

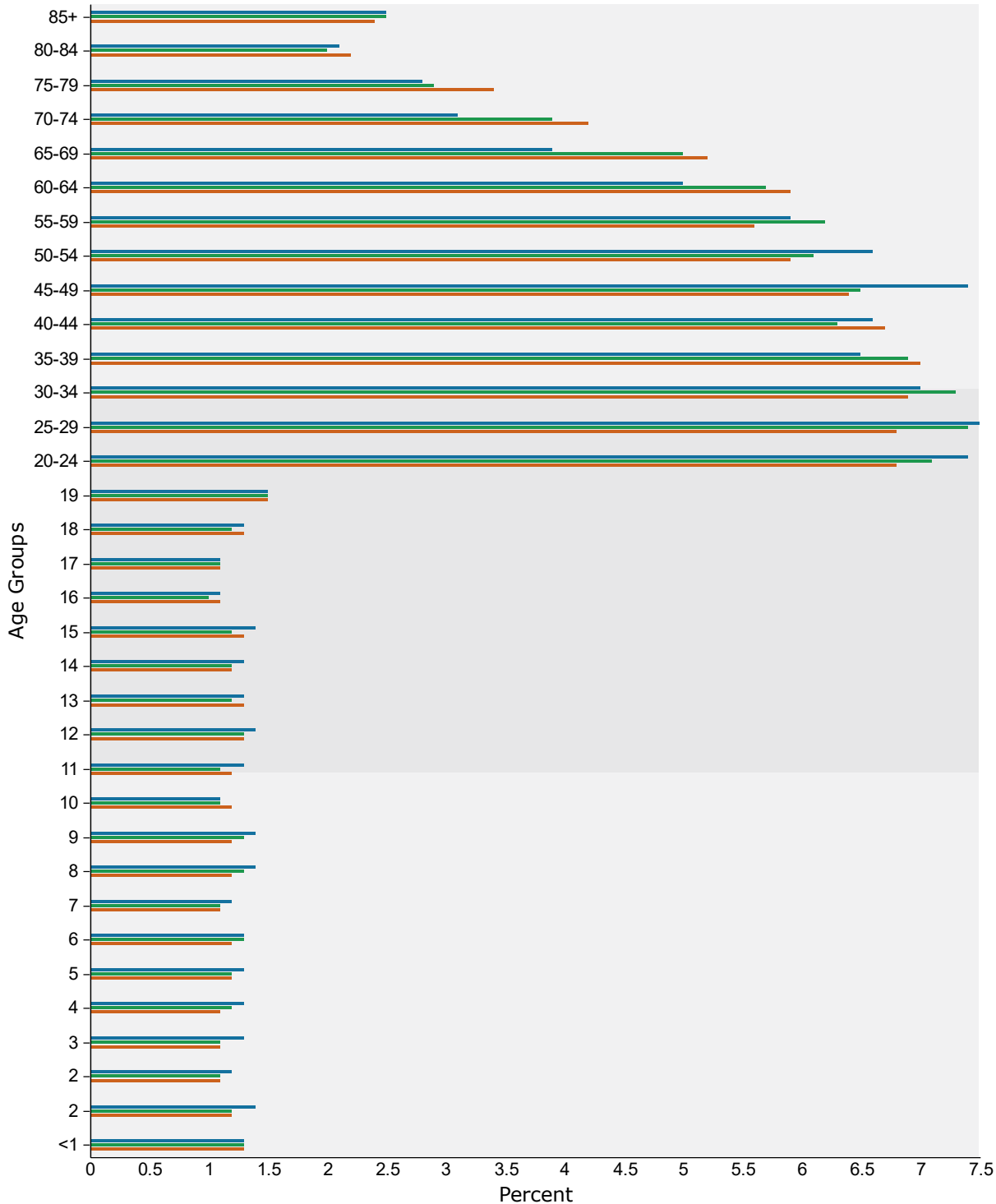
Summary	Census 2010	2019	2024	2019-2024 Change	2019-2024 Annual Rate
Population	17,156	17,072	16,899	-173	-0.20%
Households	6,182	6,124	6,046	-78	-0.26%
Average Household Size	2.45	2.46	2.47	0.01	0.08%

Total Population by Detailed Age	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
Total	17,158	100.0%	17,072	100.0%	16,901	100.0%
<1	231	1.3%	220	1.3%	214	1.3%
1	237	1.4%	212	1.2%	208	1.2%
2	202	1.2%	192	1.1%	190	1.1%
3	217	1.3%	193	1.1%	188	1.1%
4	224	1.3%	197	1.2%	192	1.1%
5	222	1.3%	207	1.2%	208	1.2%
6	230	1.3%	214	1.3%	211	1.2%
7	201	1.2%	196	1.1%	191	1.1%
8	236	1.4%	215	1.3%	207	1.2%
9	234	1.4%	218	1.3%	211	1.2%
10	197	1.1%	195	1.1%	198	1.2%
11	215	1.3%	192	1.1%	197	1.2%
12	240	1.4%	221	1.3%	225	1.3%
13	219	1.3%	210	1.2%	212	1.3%
14	216	1.3%	203	1.2%	210	1.2%
15	233	1.4%	210	1.2%	220	1.3%
16	194	1.1%	172	1.0%	184	1.1%
17	183	1.1%	180	1.1%	191	1.1%
18	215	1.3%	210	1.2%	217	1.3%
19	260	1.5%	260	1.5%	258	1.5%
20 - 24	1,268	7.4%	1,219	7.1%	1,154	6.8%
25 - 29	1,295	7.5%	1,269	7.4%	1,148	6.8%
30 - 34	1,199	7.0%	1,240	7.3%	1,170	6.9%
35 - 39	1,113	6.5%	1,184	6.9%	1,176	7.0%
40 - 44	1,128	6.6%	1,081	6.3%	1,139	6.7%
45 - 49	1,271	7.4%	1,115	6.5%	1,087	6.4%
50 - 54	1,128	6.6%	1,033	6.1%	990	5.9%
55 - 59	1,010	5.9%	1,057	6.2%	950	5.6%
60 - 64	865	5.0%	974	5.7%	989	5.9%
65 - 69	666	3.9%	847	5.0%	884	5.2%
70 - 74	535	3.1%	659	3.9%	714	4.2%
75 - 79	482	2.8%	495	2.9%	577	3.4%
80 - 84	366	2.1%	348	2.0%	380	2.2%
85+	426	2.5%	434	2.5%	411	2.4%
<18	3,932	22.9%	3,646	21.4%	3,654	21.6%
18+	13,225	77.1%	13,425	78.6%	13,245	78.4%
21+	12,507	72.9%	12,715	74.5%	12,543	74.2%
Median Age	36.8		37.9		38.6	

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

June 27, 2019

Total Population by Detailed Age



Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

Detailed Age Profile

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group

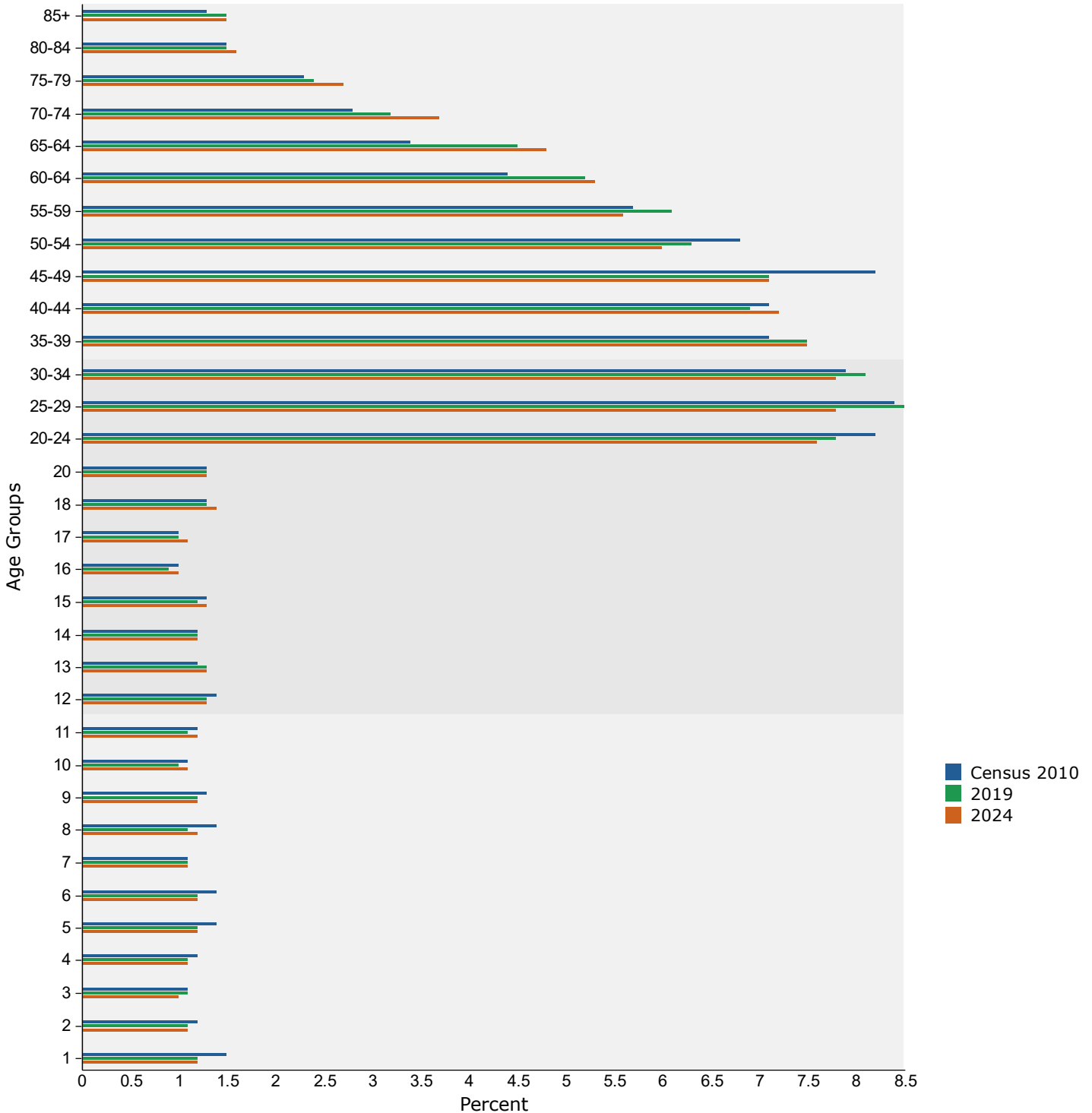
Latitude: 39.42796
Longitude: -92.43327

Male Population by Detailed Age	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
Total	8,945	100.0%	8,973	100.0%	8,922	100.0%
<1	127	1.4%	120	1.3%	116	1.3%
1	130	1.5%	110	1.2%	110	1.2%
2	109	1.2%	99	1.1%	98	1.1%
3	102	1.1%	95	1.1%	93	1.0%
4	108	1.2%	100	1.1%	99	1.1%
5	121	1.4%	107	1.2%	109	1.2%
6	127	1.4%	108	1.2%	105	1.2%
7	95	1.1%	100	1.1%	97	1.1%
8	122	1.4%	103	1.1%	103	1.2%
9	119	1.3%	112	1.2%	108	1.2%
10	94	1.1%	94	1.0%	94	1.1%
11	109	1.2%	101	1.1%	105	1.2%
12	121	1.4%	115	1.3%	117	1.3%
13	111	1.2%	116	1.3%	118	1.3%
14	111	1.2%	106	1.2%	111	1.2%
15	119	1.3%	111	1.2%	116	1.3%
16	86	1.0%	83	0.9%	91	1.0%
17	92	1.0%	91	1.0%	96	1.1%
18	113	1.3%	117	1.3%	121	1.4%
19	114	1.3%	121	1.3%	120	1.3%
20 - 24	736	8.2%	700	7.8%	680	7.6%
25 - 29	749	8.4%	762	8.5%	693	7.8%
30 - 34	706	7.9%	724	8.1%	698	7.8%
35 - 39	636	7.1%	670	7.5%	666	7.5%
40 - 44	632	7.1%	618	6.9%	641	7.2%
45 - 49	737	8.2%	639	7.1%	637	7.1%
50 - 54	606	6.8%	568	6.3%	533	6.0%
55 - 59	513	5.7%	545	6.1%	496	5.6%
60 - 64	392	4.4%	463	5.2%	476	5.3%
65 - 69	308	3.4%	403	4.5%	424	4.8%
70 - 74	251	2.8%	285	3.2%	329	3.7%
75 - 79	203	2.3%	217	2.4%	244	2.7%
80 - 84	134	1.5%	138	1.5%	147	1.6%
85+	112	1.3%	132	1.5%	131	1.5%
<18	2,002	22.4%	1,870	20.8%	1,887	21.1%
18+	6,941	77.6%	7,102	79.1%	7,037	78.8%
21+	6,578	73.5%	6,737	75.1%	6,673	74.8%
Median Age	35.4		36.4		37.0	

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

June 27, 2019

Male Population by Detailed Age



Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

Detailed Age Profile

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group

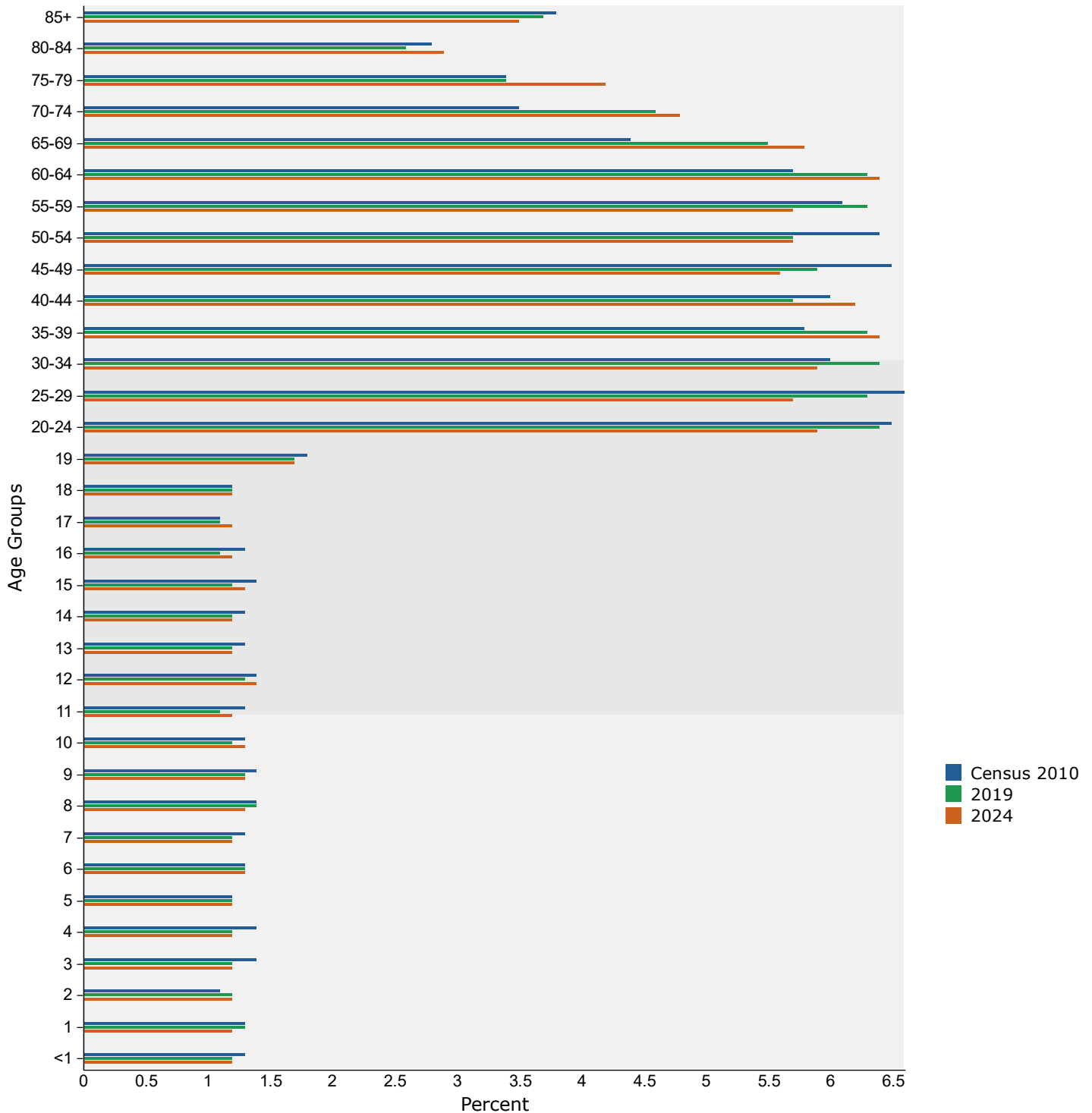
Latitude: 39.42796
Longitude: -92.43327

Female Population by Detailed Age	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
Total	8,211	100.0%	8,099	100.0%	7,973	100.0%
<1	104	1.3%	99	1.2%	98	1.2%
1	107	1.3%	102	1.3%	98	1.2%
2	93	1.1%	94	1.2%	92	1.2%
3	115	1.4%	98	1.2%	95	1.2%
4	116	1.4%	97	1.2%	93	1.2%
5	101	1.2%	100	1.2%	99	1.2%
6	103	1.3%	105	1.3%	105	1.3%
7	106	1.3%	96	1.2%	93	1.2%
8	115	1.4%	111	1.4%	104	1.3%
9	116	1.4%	106	1.3%	103	1.3%
10	103	1.3%	100	1.2%	103	1.3%
11	105	1.3%	91	1.1%	92	1.2%
12	119	1.4%	106	1.3%	108	1.4%
13	108	1.3%	95	1.2%	94	1.2%
14	105	1.3%	98	1.2%	98	1.2%
15	114	1.4%	99	1.2%	103	1.3%
16	107	1.3%	89	1.1%	93	1.2%
17	90	1.1%	90	1.1%	95	1.2%
18	102	1.2%	94	1.2%	96	1.2%
19	146	1.8%	139	1.7%	138	1.7%
20 - 24	532	6.5%	519	6.4%	474	5.9%
25 - 29	546	6.6%	507	6.3%	455	5.7%
30 - 34	492	6.0%	516	6.4%	472	5.9%
35 - 39	477	5.8%	514	6.3%	510	6.4%
40 - 44	496	6.0%	462	5.7%	497	6.2%
45 - 49	534	6.5%	476	5.9%	450	5.6%
50 - 54	522	6.4%	464	5.7%	458	5.7%
55 - 59	497	6.1%	512	6.3%	453	5.7%
60 - 64	472	5.7%	512	6.3%	513	6.4%
65 - 69	359	4.4%	444	5.5%	460	5.8%
70 - 74	284	3.5%	374	4.6%	385	4.8%
75 - 79	279	3.4%	278	3.4%	333	4.2%
80 - 84	233	2.8%	210	2.6%	233	2.9%
85+	313	3.8%	302	3.7%	280	3.5%
<18	1,928	23.5%	1,777	21.9%	1,766	22.1%
18+	6,284	76.5%	6,323	78.1%	6,208	77.9%
21+	5,929	72.2%	5,977	73.8%	5,869	73.6%
Median Age	38.8		39.8		40.8	

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

June 27, 2019

Female Population by Detailed Age



Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

Detailed Age Profile

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group

Latitude: 39.42796
Longitude: -92.43327

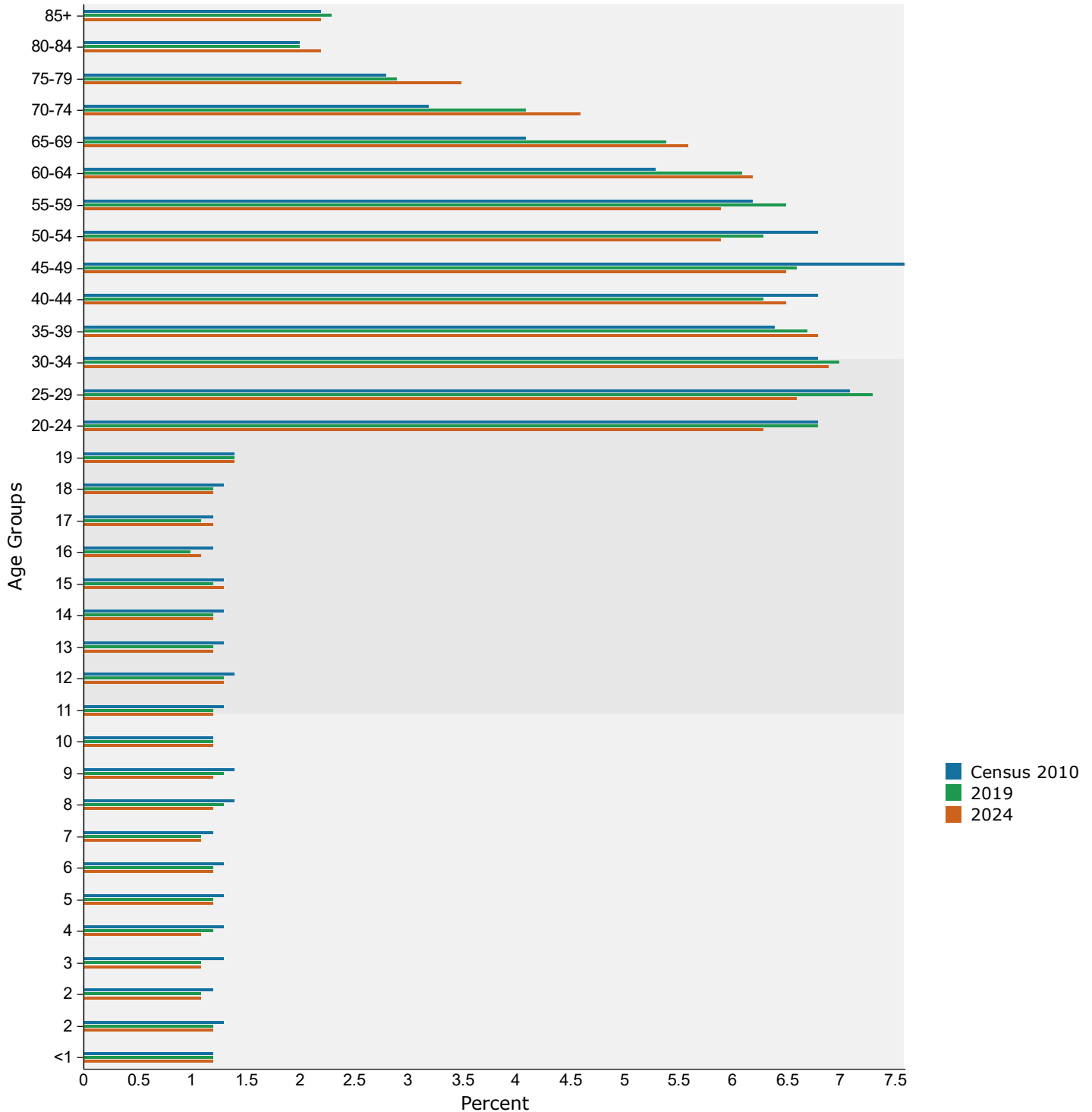
Summary	Census 2010	2019	2024	2019-2024 Change	2019-2024 Annual Rate
Population	23,630	23,517	23,291	-226	-0.19%
Households	8,591	8,511	8,407	-104	-0.25%
Average Household Size	2.46	2.47	2.48	0.01	0.08%

Total Population by Detailed Age	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
Total	23,630	100.0%	23,518	100.0%	23,287	100.0%
<1	295	1.2%	281	1.2%	275	1.2%
1	310	1.3%	284	1.2%	277	1.2%
2	284	1.2%	266	1.1%	259	1.1%
3	299	1.3%	266	1.1%	253	1.1%
4	309	1.3%	271	1.2%	263	1.1%
5	300	1.3%	280	1.2%	279	1.2%
6	310	1.3%	291	1.2%	284	1.2%
7	285	1.2%	267	1.1%	260	1.1%
8	325	1.4%	297	1.3%	287	1.2%
9	329	1.4%	296	1.3%	285	1.2%
10	292	1.2%	277	1.2%	280	1.2%
11	303	1.3%	271	1.2%	277	1.2%
12	333	1.4%	299	1.3%	305	1.3%
13	305	1.3%	284	1.2%	287	1.2%
14	319	1.3%	280	1.2%	289	1.2%
15	313	1.3%	286	1.2%	296	1.3%
16	283	1.2%	243	1.0%	259	1.1%
17	291	1.2%	254	1.1%	268	1.2%
18	298	1.3%	280	1.2%	289	1.2%
19	342	1.4%	329	1.4%	328	1.4%
20 - 24	1,616	6.8%	1,594	6.8%	1,475	6.3%
25 - 29	1,667	7.1%	1,727	7.3%	1,526	6.6%
30 - 34	1,615	6.8%	1,658	7.0%	1,611	6.9%
35 - 39	1,519	6.4%	1,579	6.7%	1,587	6.8%
40 - 44	1,597	6.8%	1,481	6.3%	1,525	6.5%
45 - 49	1,794	7.6%	1,548	6.6%	1,503	6.5%
50 - 54	1,609	6.8%	1,473	6.3%	1,385	5.9%
55 - 59	1,469	6.2%	1,517	6.5%	1,375	5.9%
60 - 64	1,261	5.3%	1,437	6.1%	1,453	6.2%
65 - 69	961	4.1%	1,260	5.4%	1,309	5.6%
70 - 74	763	3.2%	957	4.1%	1,072	4.6%
75 - 79	650	2.8%	691	2.9%	826	3.5%
80 - 84	470	2.0%	463	2.0%	523	2.2%
85+	514	2.2%	531	2.3%	517	2.2%
<18	5,485	23.2%	4,992	21.2%	4,985	21.4%
18+	18,145	76.8%	18,526	78.8%	18,306	78.6%
21+	17,194	72.8%	17,601	74.8%	17,393	74.7%
Median Age	37.6		38.7		39.5	

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

June 27, 2019

Total Population by Detailed Age



Detailed Age Profile

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group

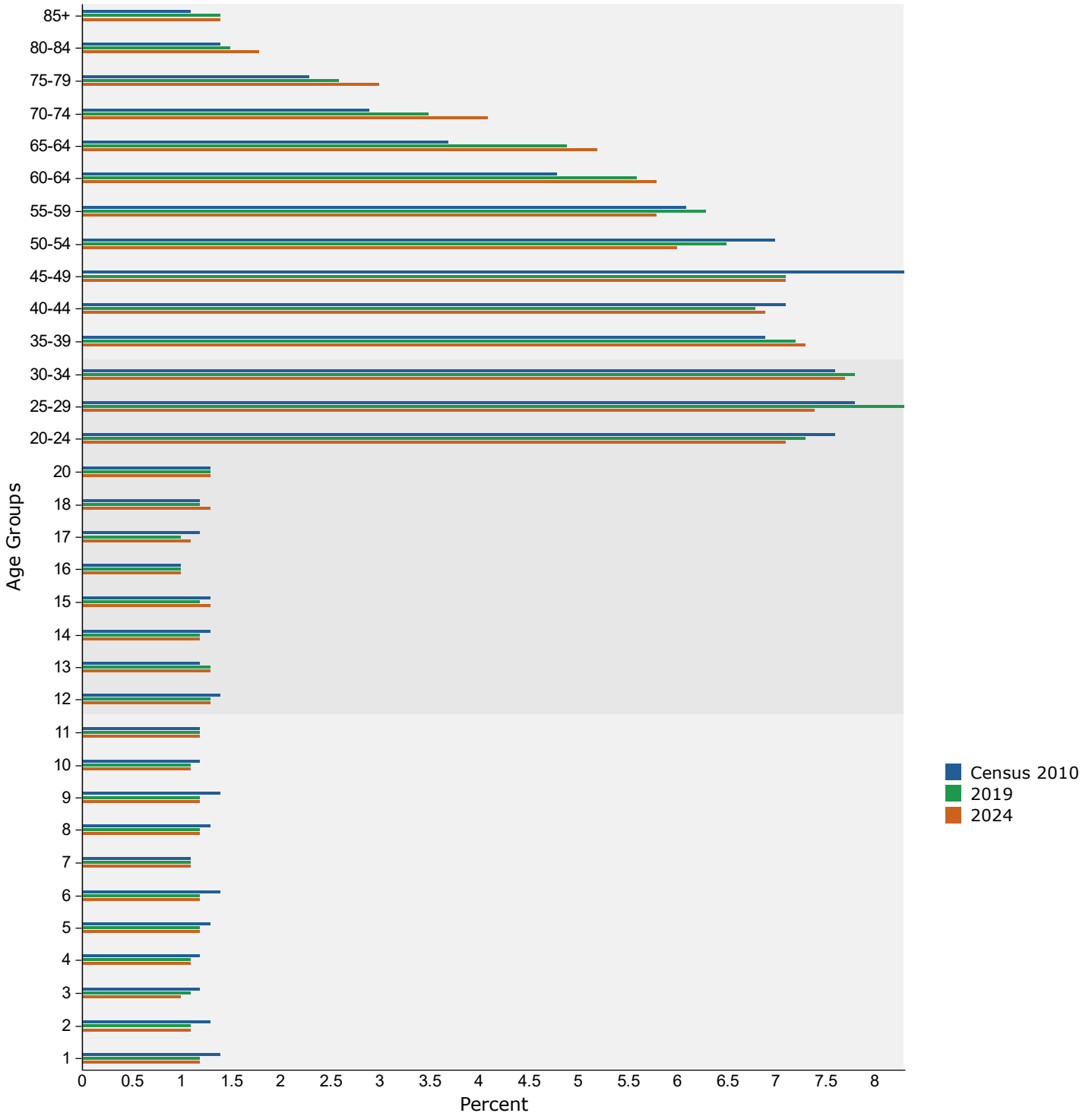
Latitude: 39.42796
Longitude: -92.43327

Male Population by Detailed Age	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
Total	12,391	100.0%	12,416	100.0%	12,343	100.0%
<1	159	1.3%	150	1.2%	145	1.2%
1	173	1.4%	147	1.2%	145	1.2%
2	158	1.3%	138	1.1%	134	1.1%
3	143	1.2%	133	1.1%	127	1.0%
4	145	1.2%	138	1.1%	137	1.1%
5	164	1.3%	146	1.2%	146	1.2%
6	174	1.4%	148	1.2%	144	1.2%
7	138	1.1%	138	1.1%	134	1.1%
8	166	1.3%	143	1.2%	143	1.2%
9	172	1.4%	153	1.2%	148	1.2%
10	144	1.2%	138	1.1%	139	1.1%
11	146	1.2%	143	1.2%	147	1.2%
12	171	1.4%	157	1.3%	158	1.3%
13	152	1.2%	156	1.3%	159	1.3%
14	163	1.3%	145	1.2%	153	1.2%
15	163	1.3%	153	1.2%	159	1.3%
16	130	1.0%	120	1.0%	129	1.0%
17	150	1.2%	130	1.0%	138	1.1%
18	151	1.2%	152	1.2%	158	1.3%
19	159	1.3%	159	1.3%	159	1.3%
20 - 24	942	7.6%	912	7.3%	874	7.1%
25 - 29	967	7.8%	1,031	8.3%	914	7.4%
30 - 34	943	7.6%	967	7.8%	951	7.7%
35 - 39	861	6.9%	889	7.2%	900	7.3%
40 - 44	884	7.1%	841	6.8%	855	6.9%
45 - 49	1,033	8.3%	878	7.1%	873	7.1%
50 - 54	862	7.0%	801	6.5%	740	6.0%
55 - 59	752	6.1%	786	6.3%	714	5.8%
60 - 64	597	4.8%	697	5.6%	710	5.8%
65 - 69	462	3.7%	612	4.9%	642	5.2%
70 - 74	362	2.9%	437	3.5%	509	4.1%
75 - 79	285	2.3%	317	2.6%	368	3.0%
80 - 84	178	1.4%	192	1.5%	217	1.8%
85+	142	1.1%	169	1.4%	174	1.4%
<18	2,810	22.7%	2,576	20.7%	2,586	20.9%
18+	9,581	77.3%	9,841	79.3%	9,759	79.1%
21+	9,094	73.4%	9,361	75.4%	9,280	75.2%
Median Age	36.3		37.3		37.9	

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

June 27, 2019

Male Population by Detailed Age



Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

Detailed Age Profile

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group

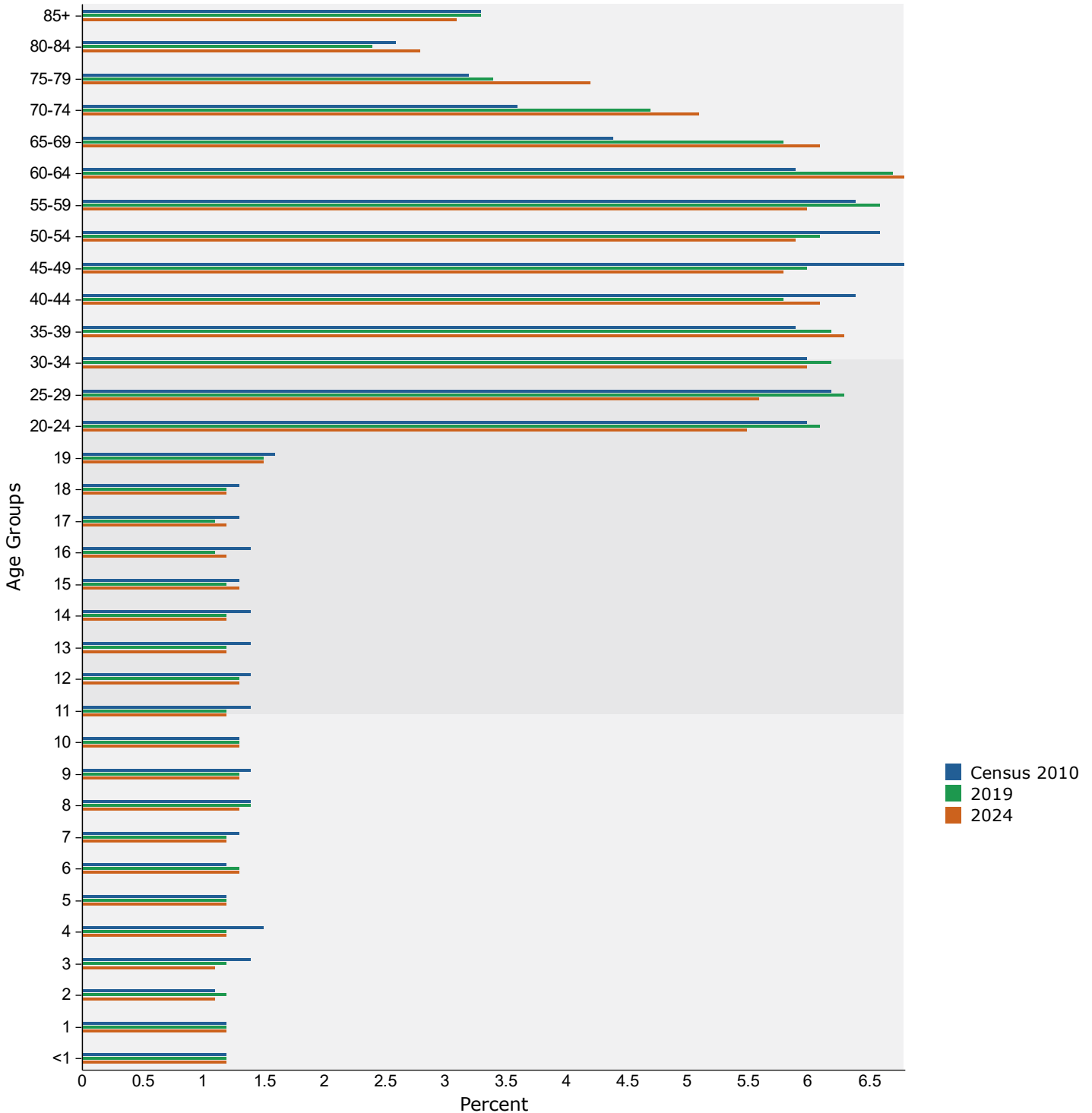
Latitude: 39.42796
Longitude: -92.43327

Female Population by Detailed Age	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
Total	11,241	100.0%	11,101	100.0%	10,943	100.0%
<1	136	1.2%	131	1.2%	129	1.2%
1	137	1.2%	137	1.2%	132	1.2%
2	127	1.1%	128	1.2%	125	1.1%
3	156	1.4%	133	1.2%	125	1.1%
4	164	1.5%	133	1.2%	127	1.2%
5	136	1.2%	134	1.2%	132	1.2%
6	136	1.2%	143	1.3%	140	1.3%
7	147	1.3%	129	1.2%	126	1.2%
8	159	1.4%	154	1.4%	144	1.3%
9	157	1.4%	143	1.3%	138	1.3%
10	148	1.3%	139	1.3%	141	1.3%
11	157	1.4%	128	1.2%	130	1.2%
12	162	1.4%	142	1.3%	147	1.3%
13	153	1.4%	128	1.2%	128	1.2%
14	156	1.4%	134	1.2%	136	1.2%
15	150	1.3%	132	1.2%	137	1.3%
16	153	1.4%	123	1.1%	130	1.2%
17	141	1.3%	124	1.1%	130	1.2%
18	146	1.3%	128	1.2%	131	1.2%
19	182	1.6%	170	1.5%	169	1.5%
20 - 24	674	6.0%	682	6.1%	601	5.5%
25 - 29	699	6.2%	696	6.3%	612	5.6%
30 - 34	672	6.0%	692	6.2%	660	6.0%
35 - 39	658	5.9%	689	6.2%	687	6.3%
40 - 44	714	6.4%	640	5.8%	670	6.1%
45 - 49	762	6.8%	670	6.0%	630	5.8%
50 - 54	747	6.6%	672	6.1%	645	5.9%
55 - 59	718	6.4%	730	6.6%	660	6.0%
60 - 64	665	5.9%	741	6.7%	743	6.8%
65 - 69	499	4.4%	648	5.8%	667	6.1%
70 - 74	401	3.6%	520	4.7%	563	5.1%
75 - 79	365	3.2%	375	3.4%	458	4.2%
80 - 84	292	2.6%	271	2.4%	307	2.8%
85+	372	3.3%	362	3.3%	343	3.1%
<18	2,675	23.8%	2,415	21.8%	2,399	21.9%
18+	8,565	76.2%	8,685	78.2%	8,546	78.1%
21+	8,100	72.1%	8,241	74.2%	8,113	74.1%
Median Age	39.3		40.6		41.6	

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

June 27, 2019

Female Population by Detailed Age



Detailed Age Profile

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group

Latitude: 39.42796
Longitude: -92.43327

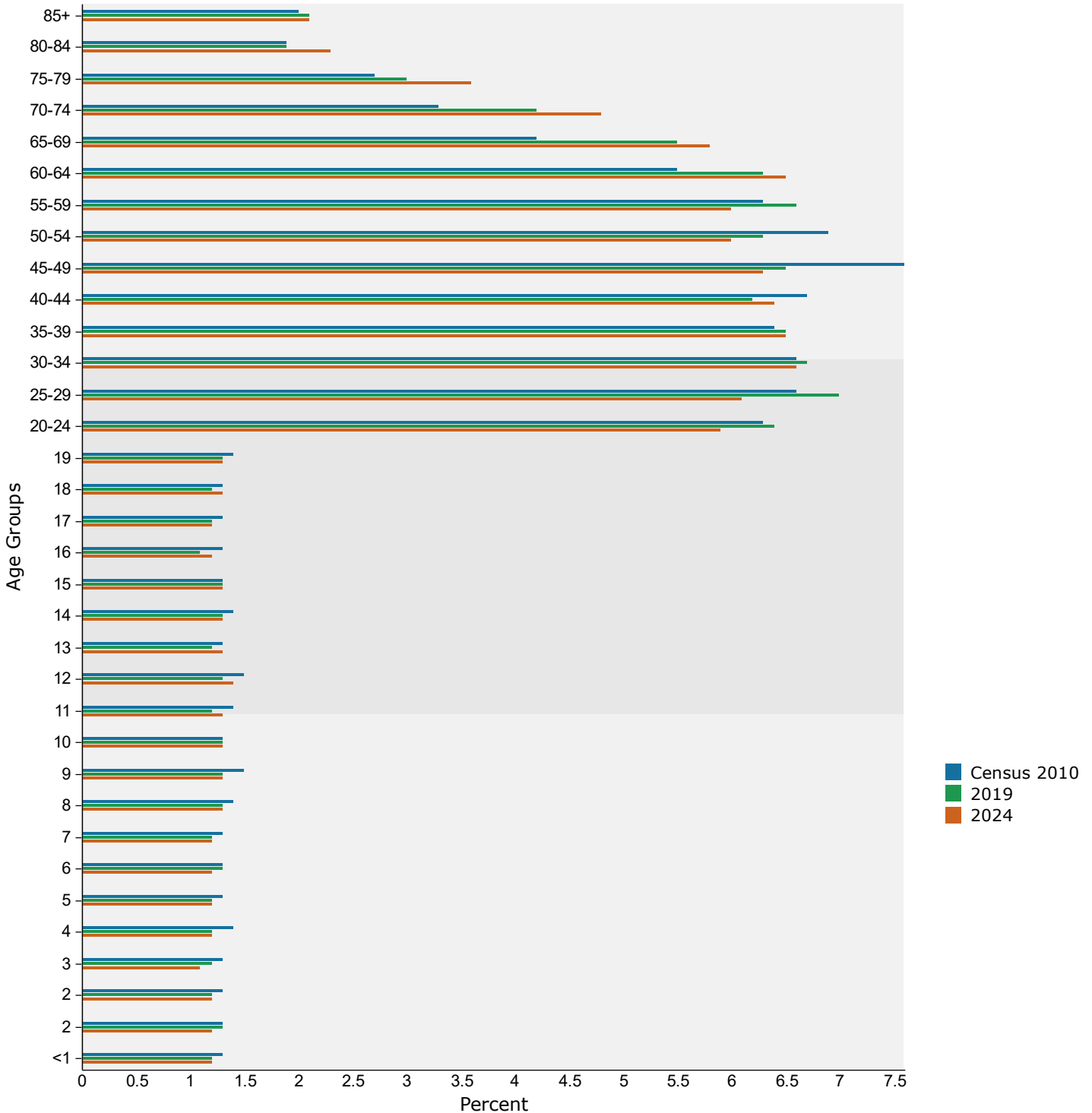
Summary	Census 2010	2019	2024	2019-2024 Change	2019-2024 Annual Rate
Population	29,422	29,280	29,024	-256	-0.18%
Households	10,700	10,598	10,480	-118	-0.22%
Average Household Size	2.52	2.53	2.53	0.00	0.00%

Total Population by Detailed Age	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
Total	29,423	100.0%	29,281	100.0%	29,023	100.0%
<1	379	1.3%	358	1.2%	349	1.2%
1	397	1.3%	369	1.3%	361	1.2%
2	369	1.3%	350	1.2%	338	1.2%
3	388	1.3%	341	1.2%	323	1.1%
4	414	1.4%	357	1.2%	350	1.2%
5	393	1.3%	362	1.2%	359	1.2%
6	395	1.3%	370	1.3%	361	1.2%
7	384	1.3%	354	1.2%	346	1.2%
8	422	1.4%	389	1.3%	379	1.3%
9	433	1.5%	386	1.3%	369	1.3%
10	384	1.3%	369	1.3%	373	1.3%
11	403	1.4%	359	1.2%	368	1.3%
12	431	1.5%	385	1.3%	394	1.4%
13	380	1.3%	363	1.2%	368	1.3%
14	423	1.4%	369	1.3%	380	1.3%
15	387	1.3%	368	1.3%	380	1.3%
16	372	1.3%	334	1.1%	356	1.2%
17	389	1.3%	338	1.2%	359	1.2%
18	393	1.3%	366	1.2%	380	1.3%
19	403	1.4%	388	1.3%	388	1.3%
20 - 24	1,865	6.3%	1,877	6.4%	1,722	5.9%
25 - 29	1,944	6.6%	2,037	7.0%	1,776	6.1%
30 - 34	1,931	6.6%	1,950	6.7%	1,915	6.6%
35 - 39	1,872	6.4%	1,901	6.5%	1,896	6.5%
40 - 44	1,963	6.7%	1,810	6.2%	1,848	6.4%
45 - 49	2,237	7.6%	1,906	6.5%	1,840	6.3%
50 - 54	2,044	6.9%	1,838	6.3%	1,732	6.0%
55 - 59	1,858	6.3%	1,932	6.6%	1,737	6.0%
60 - 64	1,621	5.5%	1,853	6.3%	1,874	6.5%
65 - 69	1,245	4.2%	1,617	5.5%	1,697	5.8%
70 - 74	969	3.3%	1,234	4.2%	1,382	4.8%
75 - 79	791	2.7%	877	3.0%	1,058	3.6%
80 - 84	555	1.9%	565	1.9%	659	2.3%
85+	589	2.0%	609	2.1%	606	2.1%
<18	7,142	24.3%	6,520	22.3%	6,512	22.4%
18+	22,279	75.7%	22,761	77.7%	22,512	77.6%
21+	21,120	71.8%	21,630	73.9%	21,391	73.7%
Median Age	37.8		39.0		39.8	

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

June 27, 2019

Total Population by Detailed Age



Detailed Age Profile

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group

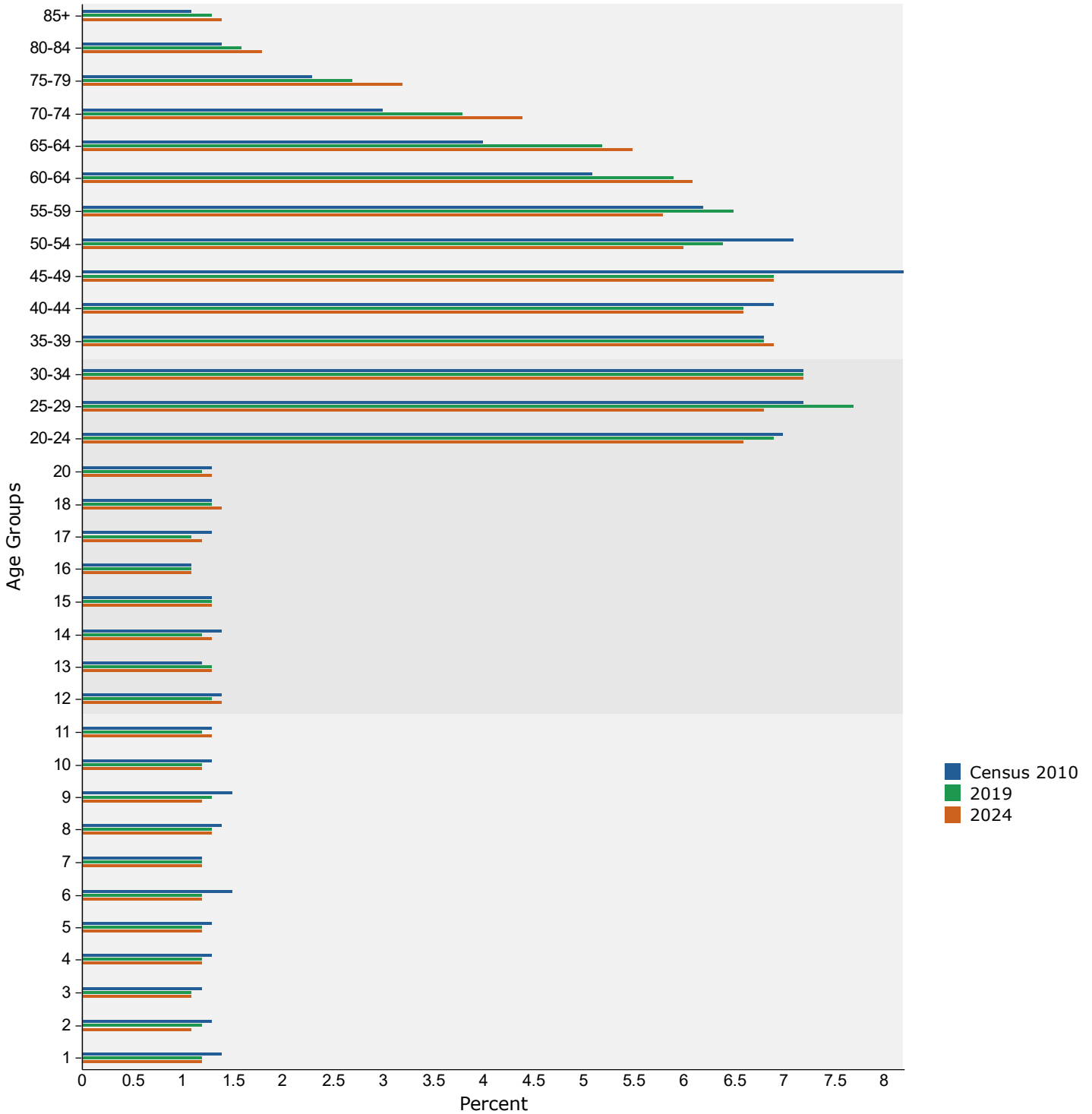
Latitude: 39.42796
Longitude: -92.43327

Male Population by Detailed Age	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
Total	15,311	100.0%	15,332	100.0%	15,249	100.0%
<1	201	1.3%	189	1.2%	183	1.2%
1	216	1.4%	190	1.2%	187	1.2%
2	204	1.3%	180	1.2%	172	1.1%
3	186	1.2%	172	1.1%	165	1.1%
4	197	1.3%	178	1.2%	179	1.2%
5	206	1.3%	184	1.2%	184	1.2%
6	225	1.5%	190	1.2%	184	1.2%
7	186	1.2%	181	1.2%	177	1.2%
8	217	1.4%	194	1.3%	193	1.3%
9	223	1.5%	199	1.3%	190	1.2%
10	193	1.3%	185	1.2%	187	1.2%
11	196	1.3%	189	1.2%	195	1.3%
12	220	1.4%	204	1.3%	206	1.4%
13	189	1.2%	196	1.3%	200	1.3%
14	213	1.4%	188	1.2%	198	1.3%
15	198	1.3%	195	1.3%	202	1.3%
16	174	1.1%	162	1.1%	174	1.1%
17	193	1.3%	171	1.1%	182	1.2%
18	205	1.3%	198	1.3%	207	1.4%
19	192	1.3%	190	1.2%	192	1.3%
20 - 24	1,074	7.0%	1,056	6.9%	1,002	6.6%
25 - 29	1,100	7.2%	1,187	7.7%	1,037	6.8%
30 - 34	1,107	7.2%	1,111	7.2%	1,099	7.2%
35 - 39	1,045	6.8%	1,048	6.8%	1,057	6.9%
40 - 44	1,058	6.9%	1,017	6.6%	1,014	6.6%
45 - 49	1,261	8.2%	1,062	6.9%	1,054	6.9%
50 - 54	1,084	7.1%	978	6.4%	916	6.0%
55 - 59	954	6.2%	999	6.5%	891	5.8%
60 - 64	787	5.1%	907	5.9%	923	6.1%
65 - 69	608	4.0%	800	5.2%	844	5.5%
70 - 74	459	3.0%	583	3.8%	675	4.4%
75 - 79	356	2.3%	408	2.7%	487	3.2%
80 - 84	215	1.4%	239	1.6%	281	1.8%
85+	169	1.1%	202	1.3%	212	1.4%
<18	3,637	23.8%	3,348	21.8%	3,358	22.0%
18+	11,672	76.2%	11,984	78.2%	11,891	78.0%
21+	11,070	72.3%	11,398	74.3%	11,301	74.1%
Median Age	36.6		37.8		38.5	

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

June 27, 2019

Male Population by Detailed Age



Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

Detailed Age Profile

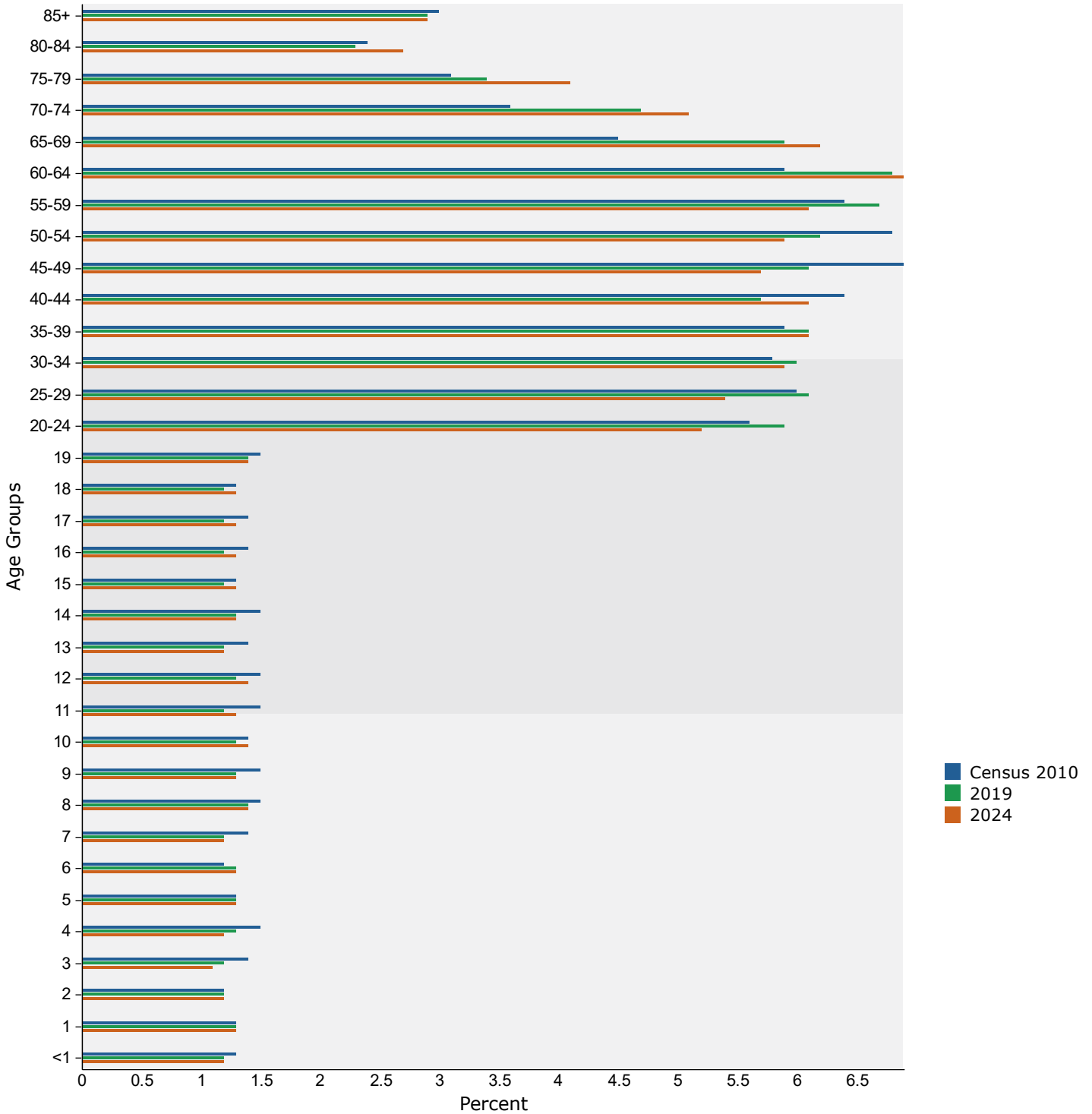
Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

Female Population by Detailed Age	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
Total	14,113	100.0%	13,948	100.0%	13,774	100.0%
<1	178	1.3%	168	1.2%	166	1.2%
1	181	1.3%	179	1.3%	173	1.3%
2	165	1.2%	170	1.2%	165	1.2%
3	202	1.4%	169	1.2%	158	1.1%
4	217	1.5%	178	1.3%	171	1.2%
5	187	1.3%	177	1.3%	175	1.3%
6	169	1.2%	180	1.3%	177	1.3%
7	198	1.4%	173	1.2%	169	1.2%
8	205	1.5%	196	1.4%	186	1.4%
9	210	1.5%	187	1.3%	180	1.3%
10	191	1.4%	184	1.3%	186	1.4%
11	207	1.5%	170	1.2%	174	1.3%
12	211	1.5%	181	1.3%	187	1.4%
13	191	1.4%	167	1.2%	168	1.2%
14	210	1.5%	181	1.3%	182	1.3%
15	189	1.3%	173	1.2%	178	1.3%
16	199	1.4%	171	1.2%	182	1.3%
17	196	1.4%	167	1.2%	176	1.3%
18	188	1.3%	168	1.2%	173	1.3%
19	212	1.5%	198	1.4%	196	1.4%
20 - 24	791	5.6%	821	5.9%	720	5.2%
25 - 29	844	6.0%	850	6.1%	739	5.4%
30 - 34	823	5.8%	839	6.0%	816	5.9%
35 - 39	827	5.9%	854	6.1%	839	6.1%
40 - 44	904	6.4%	794	5.7%	835	6.1%
45 - 49	977	6.9%	844	6.1%	786	5.7%
50 - 54	959	6.8%	860	6.2%	816	5.9%
55 - 59	903	6.4%	933	6.7%	846	6.1%
60 - 64	835	5.9%	945	6.8%	951	6.9%
65 - 69	638	4.5%	817	5.9%	854	6.2%
70 - 74	510	3.6%	651	4.7%	707	5.1%
75 - 79	435	3.1%	470	3.4%	571	4.1%
80 - 84	341	2.4%	326	2.3%	378	2.7%
85+	420	3.0%	407	2.9%	394	2.9%
<18	3,506	24.8%	3,170	22.7%	3,154	22.9%
18+	10,607	75.2%	10,778	77.3%	10,621	77.1%
21+	10,050	71.2%	10,233	73.4%	10,091	73.3%
Median Age	39.2		40.5		41.5	

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

Female Population by Detailed Age



Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

Executive Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	Moberly city,...
Population	
2000 Population	13,655
2010 Population	14,019
2019 Population	13,876
2024 Population	13,707
2000-2010 Annual Rate	0.26%
2010-2019 Annual Rate	-0.11%
2019-2024 Annual Rate	-0.24%
2019 Male Population	51.9%
2019 Female Population	48.1%
2019 Median Age	37.2

In the identified area, the current year population is 13,876. In 2010, the Census count in the area was 14,019. The rate of change since 2010 was -0.11% annually. The five-year projection for the population in the area is 13,707 representing a change of -0.24% annually from 2019 to 2024. Currently, the population is 51.9% male and 48.1% female.

Median Age	
The median age in this area is 37.2, compared to U.S. median age of 38.5.	
Race and Ethnicity	
2019 White Alone	86.0%
2019 Black Alone	8.2%
2019 American Indian/Alaska Native Alone	0.5%
2019 Asian Alone	1.3%
2019 Pacific Islander Alone	0.0%
2019 Other Race	0.4%
2019 Two or More Races	3.5%
2019 Hispanic Origin (Any Race)	2.7%

Persons of Hispanic origin represent 2.7% of the population in the identified area compared to 18.6% of the U.S. population. Persons of Hispanic Origin may be of any race. The Diversity Index, which measures the probability that two people from the same area will be from different race/ethnic groups, is 29.2 in the identified area, compared to 64.8 for the U.S. as a whole.

Households	
2019 Wealth Index	47
2000 Households	4,988
2010 Households	4,973
2019 Total Households	4,897
2024 Total Households	4,823
2000-2010 Annual Rate	-0.03%
2010-2019 Annual Rate	-0.17%
2019-2024 Annual Rate	-0.30%
2019 Average Household Size	2.49

The household count in this area has changed from 4,973 in 2010 to 4,897 in the current year, a change of -0.17% annually. The five-year projection of households is 4,823, a change of -0.30% annually from the current year total. Average household size is currently 2.49, compared to 2.35 in the year 2010. The number of families in the current year is 2,930 in the specified area.

Data Note: Income is expressed in current dollars. Housing Affordability Index and Percent of Income for Mortgage calculations are only available for areas with 50 or more owner-occupied housing units.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024. Esri converted Census 2000 data into 2010 geography.

June 27, 2019

Executive Summary

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Moberly city,...

Mortgage Income

2019 Percent of Income for Mortgage	11.6%
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Median Household Income

2019 Median Household Income	\$39,315
2024 Median Household Income	\$46,723
2019-2024 Annual Rate	3.51%

Average Household Income

2019 Average Household Income	\$53,880
2024 Average Household Income	\$62,049
2019-2024 Annual Rate	2.86%

Per Capita Income

2019 Per Capita Income	\$20,542
2024 Per Capita Income	\$23,524
2019-2024 Annual Rate	2.75%

Households by Income

Current median household income is \$39,315 in the area, compared to \$60,548 for all U.S. households. Median household income is projected to be \$46,723 in five years, compared to \$69,180 for all U.S. households

Current average household income is \$53,880 in this area, compared to \$87,398 for all U.S. households. Average household income is projected to be \$62,049 in five years, compared to \$99,638 for all U.S. households

Current per capita income is \$20,542 in the area, compared to the U.S. per capita income of \$33,028. The per capita income is projected to be \$23,524 in five years, compared to \$36,530 for all U.S. households

Housing

2019 Housing Affordability Index	210
2000 Total Housing Units	5,806
2000 Owner Occupied Housing Units	3,141
2000 Renter Occupied Housing Units	1,847
2000 Vacant Housing Units	818
2010 Total Housing Units	5,699
2010 Owner Occupied Housing Units	2,958
2010 Renter Occupied Housing Units	2,015
2010 Vacant Housing Units	726
2019 Total Housing Units	5,650
2019 Owner Occupied Housing Units	3,088
2019 Renter Occupied Housing Units	1,809
2019 Vacant Housing Units	753
2024 Total Housing Units	5,623
2024 Owner Occupied Housing Units	3,076
2024 Renter Occupied Housing Units	1,747
2024 Vacant Housing Units	800

Currently, 54.7% of the 5,650 housing units in the area are owner occupied; 32.0%, renter occupied; and 13.3% are vacant. Currently, in the U.S., 56.4% of the housing units in the area are owner occupied; 32.4% are renter occupied; and 11.2% are vacant. In 2010, there were 5,699 housing units in the area - 51.9% owner occupied, 35.4% renter occupied, and 12.7% vacant. The annual rate of change in housing units since 2010 is -0.38%. Median home value in the area is \$93,391, compared to a median home value of \$234,154 for the U.S. In five years, median value is projected to change by 1.87% annually to \$102,453.

Data Note: Income is expressed in current dollars. Housing Affordability Index and Percent of Income for Mortgage calculations are only available for areas with 50 or more owner-occupied housing units.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024. Esri converted Census 2000 data into 2010 geography.

June 27, 2019

Executive Summary

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	5 miles	10 miles	15 miles
Population			
2000 Population	16,716	23,021	28,460
2010 Population	17,156	23,630	29,422
2019 Population	17,072	23,517	29,280
2024 Population	16,899	23,291	29,024
2000-2010 Annual Rate	0.26%	0.26%	0.33%
2010-2019 Annual Rate	-0.05%	-0.05%	-0.05%
2019-2024 Annual Rate	-0.20%	-0.19%	-0.18%
2019 Male Population	52.6%	52.8%	52.4%
2019 Female Population	47.4%	47.2%	47.6%
2019 Median Age	37.9	38.7	39.0

In the identified area, the current year population is 29,280. In 2010, the Census count in the area was 29,422. The rate of change since 2010 was -0.05% annually. The five-year projection for the population in the area is 29,024 representing a change of -0.18% annually from 2019 to 2024. Currently, the population is 52.4% male and 47.6% female.

Median Age

The median age in this area is 37.9, compared to U.S. median age of 38.5.

Race and Ethnicity

2019 White Alone	87.3%	89.1%	90.6%
2019 Black Alone	7.4%	6.2%	5.1%
2019 American Indian/Alaska Native Alone	0.5%	0.5%	0.5%
2019 Asian Alone	1.2%	1.0%	0.8%
2019 Pacific Islander Alone	0.0%	0.0%	0.0%
2019 Other Race	0.4%	0.4%	0.4%
2019 Two or More Races	3.2%	2.9%	2.7%
2019 Hispanic Origin (Any Race)	2.5%	2.2%	2.0%

Persons of Hispanic origin represent 2.0% of the population in the identified area compared to 18.6% of the U.S. population. Persons of Hispanic Origin may be of any race. The Diversity Index, which measures the probability that two people from the same area will be from different race/ethnic groups, is 21.0 in the identified area, compared to 64.8 for the U.S. as a whole.

Households

2019 Wealth Index	53	56	58
2000 Households	6,151	8,504	10,506
2010 Households	6,182	8,591	10,700
2019 Total Households	6,124	8,511	10,598
2024 Total Households	6,046	8,407	10,480
2000-2010 Annual Rate	0.05%	0.10%	0.18%
2010-2019 Annual Rate	-0.10%	-0.10%	-0.10%
2019-2024 Annual Rate	-0.26%	-0.25%	-0.22%
2019 Average Household Size	2.46	2.47	2.53

The household count in this area has changed from 10,700 in 2010 to 10,598 in the current year, a change of -0.10% annually. The five-year projection of households is 10,480, a change of -0.22% annually from the current year total. Average household size is currently 2.53, compared to 2.52 in the year 2010. The number of families in the current year is 7,095 in the specified area.

Data Note: Income is expressed in current dollars. Housing Affordability Index and Percent of Income for Mortgage calculations are only available for areas with 50 or more owner-occupied housing units.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024. Esri converted Census 2000 data into 2010 geography.



Executive Summary

Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

	5 miles	10 miles	15 miles
Mortgage Income			
2019 Percent of Income for Mortgage	11.4%	11.0%	11.3%
Median Household Income			
2019 Median Household Income	\$43,604	\$47,303	\$49,054
2024 Median Household Income	\$51,113	\$53,284	\$54,303
2019-2024 Annual Rate	3.23%	2.41%	2.05%
Average Household Income			
2019 Average Household Income	\$57,089	\$59,198	\$60,423
2024 Average Household Income	\$65,458	\$67,660	\$68,969
2019-2024 Annual Rate	2.77%	2.71%	2.68%
Per Capita Income			
2019 Per Capita Income	\$21,197	\$21,686	\$22,081
2024 Per Capita Income	\$24,203	\$24,701	\$25,135
2019-2024 Annual Rate	2.69%	2.64%	2.62%
Households by Income			

Current median household income is \$49,054 in the area, compared to \$60,548 for all U.S. households. Median household income is projected to be \$54,303 in five years, compared to \$69,180 for all U.S. households

Current average household income is \$60,423 in this area, compared to \$87,398 for all U.S. households. Average household income is projected to be \$68,969 in five years, compared to \$99,638 for all U.S. households

Current per capita income is \$22,081 in the area, compared to the U.S. per capita income of \$33,028. The per capita income is projected to be \$25,135 in five years, compared to \$36,530 for all U.S. households

Housing			
2019 Housing Affordability Index	205	214	209
2000 Total Housing Units	7,111	9,861	12,203
2000 Owner Occupied Housing Units	4,126	6,030	7,715
2000 Renter Occupied Housing Units	2,026	2,474	2,791
2000 Vacant Housing Units	959	1,357	1,697
2010 Total Housing Units	7,037	9,808	12,268
2010 Owner Occupied Housing Units	3,989	5,939	7,733
2010 Renter Occupied Housing Units	2,193	2,652	2,967
2010 Vacant Housing Units	855	1,217	1,568
2019 Total Housing Units	7,018	9,787	12,258
2019 Owner Occupied Housing Units	4,152	6,131	7,896
2019 Renter Occupied Housing Units	1,972	2,380	2,703
2019 Vacant Housing Units	894	1,276	1,660
2024 Total Housing Units	6,998	9,780	12,263
2024 Owner Occupied Housing Units	4,137	6,096	7,848
2024 Renter Occupied Housing Units	1,909	2,311	2,632
2024 Vacant Housing Units	952	1,373	1,783

Currently, 64.4% of the 12,258 housing units in the area are owner occupied; 22.1%, renter occupied; and 13.5% are vacant. Currently, in the U.S., 56.4% of the housing units in the area are owner occupied; 32.4% are renter occupied; and 11.2% are vacant. In 2010, there were 12,268 housing units in the area - 63.0% owner occupied, 24.2% renter occupied, and 12.8% vacant. The annual rate of change in housing units since 2010 is -0.04%. Median home value in the area is \$113,405, compared to a median home value of \$234,154 for the U.S. In five years, median value is projected to change by 2.87% annually to \$130,660.

Data Note: Income is expressed in current dollars. Housing Affordability Index and Percent of Income for Mortgage calculations are only available for areas with 50 or more owner-occupied housing units.

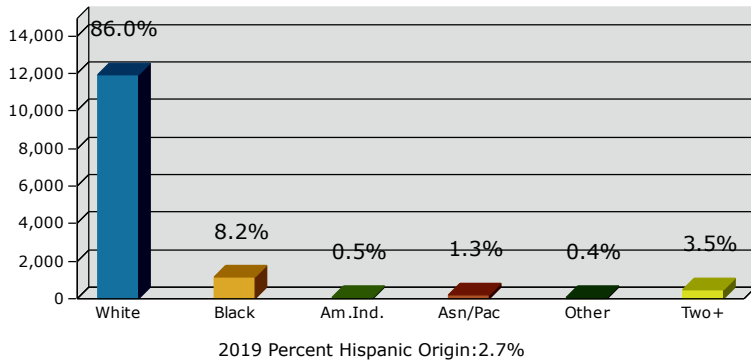
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024. Esri converted Census 2000 data into 2010 geography.

Graphic Profile

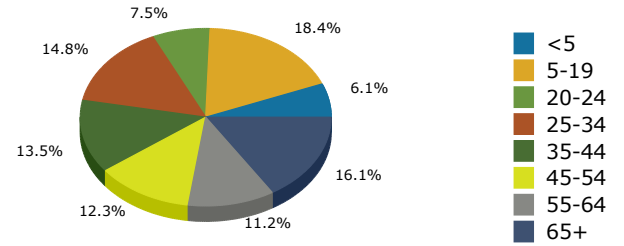
Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

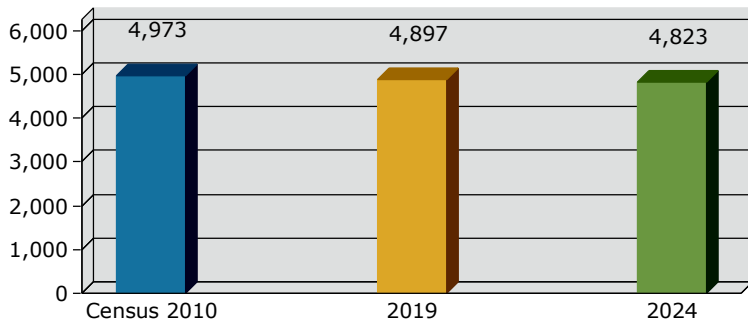
2019 Population by Race



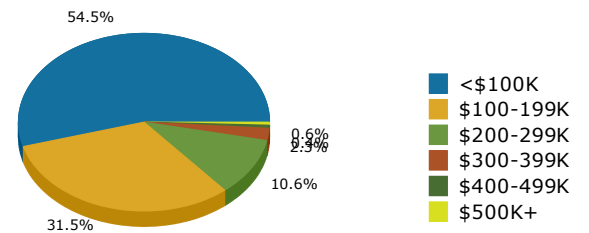
2019 Population by Age



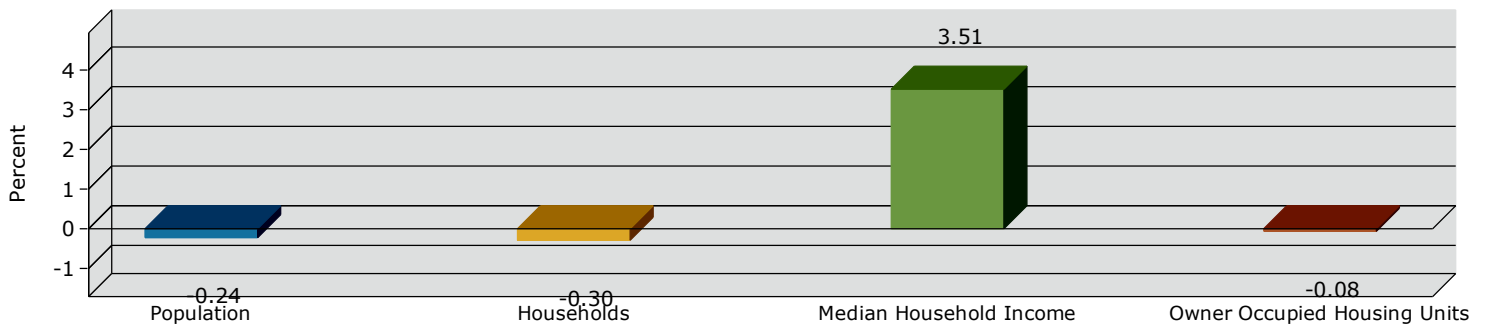
Households



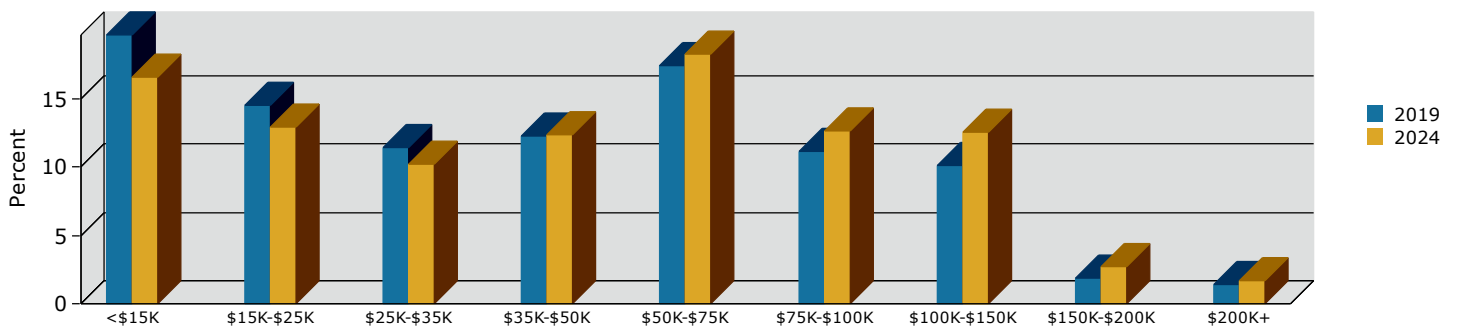
2019 Home Value



2019-2024 Annual Growth Rate



Household Income



Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

Retail Goods and Services Expenditures

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Top Tapestry Segments	Percent	Demographic Summary	2019	2024
Small Town Simplicity (12C)	29.7%	Population	13,876	13,707
Traditional Living (12B)	23.4%	Households	4,897	4,823
Hardscrabble Road (8G)	19.5%	Families	2,930	2,866
Midlife Constants (5E)	18.9%	Median Age	37.2	37.9
Prairie Living (6D)	8.3%	Median Household Income	\$39,315	\$46,723
		Spending Potential Index	Average Amount Spent	Total
Apparel and Services		62	\$1,322.95	\$6,478,490
Men's		62	\$256.98	\$1,258,449
Women's		60	\$431.23	\$2,111,714
Children's		65	\$210.00	\$1,028,352
Footwear		63	\$305.09	\$1,494,036
Watches & Jewelry		61	\$83.69	\$409,847
Apparel Products and Services (1)		54	\$35.96	\$176,092
Computer				
Computers and Hardware for Home Use		58	\$96.69	\$473,490
Portable Memory		57	\$2.54	\$12,416
Computer Software		60	\$6.09	\$29,799
Computer Accessories		61	\$11.49	\$56,242
Entertainment & Recreation		65	\$2,125.05	\$10,406,346
Fees and Admissions		53	\$378.58	\$1,853,893
Membership Fees for Clubs (2)		52	\$122.48	\$599,780
Fees for Participant Sports, excl. Trips		55	\$59.18	\$289,792
Tickets to Theatre/Operas/Concerts		52	\$39.44	\$193,131
Tickets to Movies		55	\$29.98	\$146,832
Tickets to Parks or Museums		57	\$18.46	\$90,412
Admission to Sporting Events, excl. Trips		61	\$38.31	\$187,617
Fees for Recreational Lessons		49	\$70.25	\$344,002
Dating Services		68	\$0.48	\$2,329
TV/Video/Audio		69	\$850.13	\$4,163,071
Cable and Satellite Television Services		71	\$625.88	\$3,064,928
Televisions		67	\$72.86	\$356,819
Satellite Dishes		64	\$1.00	\$4,885
VCRs, Video Cameras, and DVD Players		64	\$3.70	\$18,115
Miscellaneous Video Equipment		67	\$16.98	\$83,131
Video Cassettes and DVDs		68	\$7.76	\$38,025
Video Game Hardware/Accessories		70	\$19.40	\$95,012
Video Game Software		68	\$10.30	\$50,427
Rental/Streaming/Downloaded Video		63	\$29.37	\$143,846
Installation of Televisions		53	\$0.60	\$2,961
Audio (3)		61	\$59.70	\$292,354
Rental and Repair of TV/Radio/Sound Equipment		81	\$2.57	\$12,567
Pets		72	\$477.89	\$2,340,246
Toys/Games/Crafts/Hobbies (4)		66	\$78.08	\$382,345
Recreational Vehicles and Fees (5)		65	\$104.34	\$510,953
Sports/Recreation/Exercise Equipment (6)		60	\$123.57	\$605,137
Photo Equipment and Supplies (7)		61	\$31.74	\$155,421
Reading (8)		62	\$66.44	\$325,342
Catered Affairs (9)		54	\$14.28	\$69,939
Food		64	\$5,701.09	\$27,918,244
Food at Home		66	\$3,416.11	\$16,728,694
Bakery and Cereal Products		66	\$450.16	\$2,204,426
Meats, Poultry, Fish, and Eggs		66	\$749.75	\$3,671,542
Dairy Products		67	\$360.36	\$1,764,688
Fruits and Vegetables		63	\$639.22	\$3,130,280
Snacks and Other Food at Home (10)		68	\$1,216.61	\$5,957,759
Food Away from Home		62	\$2,284.98	\$11,189,550
Alcoholic Beverages		56	\$325.97	\$1,596,254

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.

Source: Esri forecasts for 2019 and 2024; Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

June 27, 2019

Retail Goods and Services Expenditures

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

	Spending Potential Index	Average Amount Spent	Total
Financial			
Value of Stocks/Bonds/Mutual Funds	57	\$12,293.38	\$60,200,706
Value of Retirement Plans	59	\$56,430.30	\$276,339,160
Value of Other Financial Assets	68	\$3,839.25	\$18,800,823
Vehicle Loan Amount excluding Interest	69	\$1,970.78	\$9,650,893
Value of Credit Card Debt	62	\$1,512.26	\$7,405,531
Health			
Nonprescription Drugs	70	\$99.89	\$489,175
Prescription Drugs	76	\$275.76	\$1,350,411
Eyeglasses and Contact Lenses	72	\$64.95	\$318,078
Home			
Mortgage Payment and Basics (11)	59	\$5,924.64	\$29,012,976
Maintenance and Remodeling Services	56	\$1,191.61	\$5,835,299
Maintenance and Remodeling Materials (12)	72	\$351.17	\$1,719,683
Utilities, Fuel, and Public Services	69	\$3,378.02	\$16,542,168
Household Furnishings and Equipment			
Household Textiles (13)	65	\$64.66	\$316,621
Furniture	62	\$380.73	\$1,864,412
Rugs	66	\$21.37	\$104,642
Major Appliances (14)	67	\$236.58	\$1,158,518
Housewares (15)	65	\$68.96	\$337,679
Small Appliances	66	\$32.11	\$157,223
Luggage	55	\$7.71	\$37,750
Telephones and Accessories	56	\$41.93	\$205,339
Household Operations			
Child Care	57	\$290.60	\$1,423,068
Lawn and Garden (16)	66	\$312.18	\$1,528,770
Moving/Storage/Freight Express	56	\$37.19	\$182,140
Housekeeping Supplies (17)	68	\$506.15	\$2,478,594
Insurance			
Owners and Renters Insurance	71	\$408.72	\$2,001,505
Vehicle Insurance	68	\$1,050.78	\$5,145,674
Life/Other Insurance	67	\$308.34	\$1,509,958
Health Insurance	69	\$2,707.62	\$13,259,227
Personal Care Products (18)	64	\$319.69	\$1,565,505
School Books and Supplies (19)	61	\$94.87	\$464,562
Smoking Products	85	\$343.53	\$1,682,259
Transportation			
Payments on Vehicles excluding Leases	71	\$1,806.53	\$8,846,553
Gasoline and Motor Oil	69	\$1,579.22	\$7,733,417
Vehicle Maintenance and Repairs	67	\$761.57	\$3,729,423
Travel			
Airline Fares	52	\$285.07	\$1,395,985
Lodging on Trips	59	\$364.43	\$1,784,636
Auto/Truck Rental on Trips	57	\$14.88	\$72,882
Food and Drink on Trips	58	\$313.43	\$1,534,862

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.

Source: Esri forecasts for 2019 and 2024; Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

June 27, 2019

Retail Goods and Services Expenditures

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

- (1) Apparel Products and Services** includes shoe repair and other shoe services, apparel laundry and dry cleaning, alteration, repair and tailoring of apparel, clothing rental and storage, and watch and jewelry repair.
- (2) Membership Fees for Clubs** includes membership fees for social, recreational, and civic clubs.
- (3) Audio** includes satellite radio service, radios, stereos, sound components, equipment and accessories, digital audio players, records, CDs, audio tapes, streaming/downloaded audio, musical instruments and accessories, and rental and repair of musical instruments.
- (4) Toys and Games** includes toys, games, arts and crafts, tricycles, playground equipment, arcade games, online entertainment and games, and stamp and coin collecting.
- (5) Recreational Vehicles & Fees** includes docking and landing fees for boats and planes, payments on boats, trailers, campers and RVs, rental of boats, trailers, campers and RVs, and camp fees.
- (6) Sports/Recreation/Exercise Equipment** includes exercise equipment and gear, game tables, bicycles, camping equipment, hunting and fishing equipment, winter sports equipment, water sports equipment, other sports equipment, and rental/repair of sports/recreation/exercise equipment.
- (7) Photo Equipment and Supplies** includes film, film processing, photographic equipment, rental and repair of photo equipment, and photographer fees.
- (8) Reading** includes digital book readers, books, magazine and newspaper subscriptions, and single copies of magazines and newspapers.
- (9) Catered Affairs** includes expenses associated with live entertainment and rental of party supplies.
- (10) Snacks and Other Food at Home** includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fats and oils, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips and other snacks, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.
- (11) Mortgage Payment and Basics** includes mortgage interest, mortgage principal, property taxes, homeowners insurance, and ground rent on owned dwellings.
- (12) Maintenance and Remodeling Materials** includes supplies/tools/equipment for painting and wallpapering, plumbing supplies and equipment, electrical/heating/AC supplies, materials for roofing/gutters, materials for plaster/panel/siding, materials for patio/fence/brick work, landscaping materials, and insulation materials for owned homes.
- (13) Household Textiles** includes bathroom linens, bedroom linens, kitchen linens, dining room linens, other linens, curtains, draperies, slipcovers and decorative pillows.
- (14) Major Appliances** includes dishwashers, disposals, refrigerators, freezers, washers, dryers, stoves, ovens, microwaves, window air conditioners, electric floor cleaning equipment, sewing machines, and miscellaneous appliances.
- (15) Housewares** includes flatware, dishes, cups glasses, serving pieces, nonelectric cookware, and tableware.
- (16) Lawn and Garden** includes lawn and garden supplies, equipment and care service, indoor plants, fresh flowers, and repair/rental of lawn and garden equipment.
- (17) Housekeeping Supplies** includes soaps and laundry detergents, cleaning products, toilet tissue, paper towels, napkins, paper/plastic/foil products, stationery, giftwrap supplies, postage, and delivery services.
- (18) Personal Care Products** includes hair care products, nonelectric articles for hair, wigs, hairpieces, oral hygiene products, shaving needs, perfume, cosmetics, skincare, bath products, nail products, deodorant, feminine hygiene products, adult diapers, other miscellaneous care products and personal care appliances.
- (19) School Books and Supplies** includes school books and supplies for college, elementary school, high school, vocational/technical school, preschool and other schools.

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.

Source: Esri forecasts for 2019 and 2024; Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

June 27, 2019

Retail Market Potential

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Demographic Summary		2019	2024
Population		13,876	13,707
Population 18+		10,873	10,700
Households		4,897	4,823
Median Household Income		\$39,315	\$46,723

Product/Consumer Behavior	Expected Number of Adults or HHs	Percent of Adults/HHs	MPI
Apparel (Adults)			
Bought any men's clothing in last 12 months	4,906	45.1%	95
Bought any women's clothing in last 12 months	4,235	38.9%	91
Bought clothing for child <13 years in last 6 months	2,936	27.0%	101
Bought any shoes in last 12 months	5,201	47.8%	91
Bought costume jewelry in last 12 months	1,484	13.6%	78
Bought any fine jewelry in last 12 months	1,748	16.1%	90
Bought a watch in last 12 months	1,448	13.3%	86
Automobiles (Households)			
HH owns/leases any vehicle	3,993	81.5%	95
HH bought/leased new vehicle last 12 mo	359	7.3%	75
Automotive Aftermarket (Adults)			
Bought gasoline in last 6 months	9,277	85.3%	100
Bought/changed motor oil in last 12 months	5,651	52.0%	109
Had tune-up in last 12 months	2,516	23.1%	93
Beverages (Adults)			
Drank bottled water/seltzer in last 6 months	7,254	66.7%	93
Drank regular cola in last 6 months	5,575	51.3%	115
Drank beer/ale in last 6 months	3,723	34.2%	81
Cameras (Adults)			
Own digital point & shoot camera/camcorder	773	7.1%	71
Own digital SLR camera/camcorder	550	5.1%	64
Printed digital photos in last 12 months	1,901	17.5%	76
Cell Phones (Adults/Households)			
Bought cell phone in last 12 months	4,002	36.8%	106
Have a smartphone	8,276	76.1%	91
Have a smartphone: Android phone (any brand)	5,133	47.2%	117
Have a smartphone: Apple iPhone	2,874	26.4%	63
Number of cell phones in household: 1	1,855	37.9%	124
Number of cell phones in household: 2	1,807	36.9%	95
Number of cell phones in household: 3+	1,036	21.2%	75
HH has cell phone only (no landline telephone)	2,966	60.6%	108
Computers (Households)			
HH owns a computer	2,987	61.0%	83
HH owns desktop computer	1,511	30.9%	84
HH owns laptop/notebook	2,198	44.9%	79
HH owns any Apple/Mac brand computer	470	9.6%	53
HH owns any PC/non-Apple brand computer	2,659	54.3%	88
HH purchased most recent computer in a store	1,471	30.0%	83
HH purchased most recent computer online	483	9.9%	73
Spent <\$1-499 on most recent home computer	831	17.0%	115
Spent \$500-\$999 on most recent home computer	632	12.9%	77
Spent \$1,000-\$1,499 on most recent home computer	307	6.3%	65
Spent \$1,500-\$1,999 on most recent home computer	129	2.6%	59
Spent \$2,000+ on most recent home computer	93	1.9%	48

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2019 and 2024.

Retail Market Potential

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Product/Consumer Behavior	Expected Number of Adults or HHs	Percent of Adults/HHs	MPI
Convenience Stores (Adults)			
Shopped at convenience store in last 6 mos	7,231	66.5%	105
Bought brewed coffee at convenience store in last 30 days	1,517	14.0%	100
Bought cigarettes at convenience store in last 30 days	1,945	17.9%	166
Bought gas at convenience store in last 30 days	4,824	44.4%	119
Spent at convenience store in last 30 days: <\$1-19	588	5.4%	79
Spent at convenience store in last 30 days: \$20-\$39	966	8.9%	94
Spent at convenience store in last 30 days: \$40-\$50	916	8.4%	102
Spent at convenience store in last 30 days: \$51-\$99	688	6.3%	114
Spent at convenience store in last 30 days: \$100+	2,907	26.7%	120
Entertainment (Adults)			
Attended a movie in last 6 months	5,232	48.1%	82
Went to live theater in last 12 months	677	6.2%	57
Went to a bar/night club in last 12 months	1,286	11.8%	69
Dined out in last 12 months	4,898	45.0%	86
Gambled at a casino in last 12 months	1,118	10.3%	78
Visited a theme park in last 12 months	1,474	13.6%	72
Viewed movie (video-on-demand) in last 30 days	1,354	12.5%	71
Viewed TV show (video-on-demand) in last 30 days	1,006	9.3%	73
Watched any pay-per-view TV in last 12 months	778	7.2%	73
Downloaded a movie over the Internet in last 30 days	820	7.5%	79
Downloaded any individual song in last 6 months	1,601	14.7%	77
Watched a movie online in the last 30 days	2,297	21.1%	78
Watched a TV program online in last 30 days	1,488	13.7%	72
Played a video/electronic game (console) in last 12 months	1,017	9.4%	106
Played a video/electronic game (portable) in last 12 months	477	4.4%	94
Financial (Adults)			
Have home mortgage (1st)	2,601	23.9%	77
Used ATM/cash machine in last 12 months	4,737	43.6%	82
Own any stock	446	4.1%	57
Own U.S. savings bond	324	3.0%	68
Own shares in mutual fund (stock)	454	4.2%	58
Own shares in mutual fund (bonds)	303	2.8%	58
Have interest checking account	2,401	22.1%	77
Have non-interest checking account	3,179	29.2%	100
Have savings account	5,032	46.3%	81
Have 401K retirement savings plan	1,265	11.6%	72
Own/used any credit/debit card in last 12 months	7,586	69.8%	88
Avg monthly credit card expenditures: <\$1-110	1,245	11.5%	99
Avg monthly credit card expenditures: \$111-\$225	707	6.5%	88
Avg monthly credit card expenditures: \$226-\$450	561	5.2%	76
Avg monthly credit card expenditures: \$451-\$700	384	3.5%	58
Avg monthly credit card expenditures: \$701-\$1,000	339	3.1%	56
Avg monthly credit card expenditures: \$1,001+	718	6.6%	57
Did banking online in last 12 months	2,824	26.0%	67
Did banking on mobile device in last 12 months	1,918	17.6%	68
Paid bills online in last 12 months	4,190	38.5%	77

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Retail Market Potential

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent of Adults/HHs	MPI
Grocery (Adults)			
Used beef (fresh/frozen) in last 6 months	3,416	69.8%	101
Used bread in last 6 months	4,637	94.7%	102
Used chicken (fresh or frozen) in last 6 months	3,269	66.8%	96
Used turkey (fresh or frozen) in last 6 months	769	15.7%	105
Used fish/seafood (fresh or frozen) in last 6 months	2,433	49.7%	90
Used fresh fruit/vegetables in last 6 months	4,009	81.9%	95
Used fresh milk in last 6 months	4,332	88.5%	103
Used organic food in last 6 months	675	13.8%	58
Health (Adults)			
Exercise at home 2+ times per week	2,421	22.3%	81
Exercise at club 2+ times per week	808	7.4%	52
Visited a doctor in last 12 months	7,994	73.5%	96
Used vitamin/dietary supplement in last 6 months	5,235	48.1%	89
Home (Households)			
Did any home improvement in last 12 months	1,171	23.9%	86
Used any housekeeper/professional cleaning service in last 12 months	431	8.8%	60
Purchased low ticket HH furnishings in last 12 months	698	14.3%	83
Purchased big ticket HH furnishings in last 12 months	958	19.6%	88
Bought any small kitchen appliance in last 12 months	1,017	20.8%	93
Bought any large kitchen appliance in last 12 months	623	12.7%	91
Insurance (Adults/Households)			
Currently carry life insurance	4,685	43.1%	97
Carry medical/hospital/accident insurance	7,742	71.2%	95
Carry homeowner insurance	4,755	43.7%	93
Carry renter's insurance	805	7.4%	87
Have auto insurance: 1 vehicle in household covered	1,750	35.7%	115
Have auto insurance: 2 vehicles in household covered	1,135	23.2%	81
Have auto insurance: 3+ vehicles in household covered	964	19.7%	86
Pets (Households)			
Household owns any pet	2,660	54.3%	100
Household owns any cat	1,208	24.7%	108
Household owns any dog	2,066	42.2%	101
Psychographics (Adults)			
Buying American is important to me	4,940	45.4%	116
Usually buy items on credit rather than wait	1,367	12.6%	96
Usually buy based on quality - not price	1,999	18.4%	97
Price is usually more important than brand name	3,039	27.9%	102
Usually use coupons for brands I buy often	1,932	17.8%	103
Am interested in how to help the environment	1,623	14.9%	77
Usually pay more for environ safe product	1,322	12.2%	86
Usually value green products over convenience	1,083	10.0%	88
Likely to buy a brand that supports a charity	3,947	36.3%	103
Reading (Adults)			
Bought digital book in last 12 months	909	8.4%	65
Bought hardcover book in last 12 months	1,670	15.4%	77
Bought paperback book in last 12 month	2,269	20.9%	73
Read any daily newspaper (paper version)	2,107	19.4%	105
Read any digital newspaper in last 30 days	3,548	32.6%	82
Read any magazine (paper/electronic version) in last 6 months	9,671	88.9%	98

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Retail Market Potential

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Product/Consumer Behavior	Expected Number of Adults or HHs	Percent of Adults/HHs	MPI
Restaurants (Adults)			
Went to family restaurant/steak house in last 6 months	7,716	71.0%	95
Went to family restaurant/steak house: 4+ times a month	2,679	24.6%	93
Went to fast food/drive-in restaurant in last 6 months	9,940	91.4%	101
Went to fast food/drive-in restaurant 9+ times/mo	4,519	41.6%	106
Fast food restaurant last 6 months: eat in	4,060	37.3%	100
Fast food restaurant last 6 months: home delivery	797	7.3%	85
Fast food restaurant last 6 months: take-out/drive-thru	5,409	49.7%	106
Fast food restaurant last 6 months: take-out/walk-in	1,963	18.1%	87
Television & Electronics (Adults/Households)			
Own any tablet	4,192	38.6%	80
Own any e-reader	501	4.6%	55
Own e-reader/tablet: iPad	1,857	17.1%	61
HH has Internet connectable TV	1,167	23.8%	83
Own any portable MP3 player	1,473	13.5%	73
HH owns 1 TV	1,049	21.4%	102
HH owns 2 TVs	1,436	29.3%	109
HH owns 3 TVs	961	19.6%	94
HH owns 4+ TVs	704	14.4%	83
HH subscribes to cable TV	1,926	39.3%	90
HH subscribes to fiber optic	221	4.5%	64
HH owns portable GPS navigation device	967	19.7%	86
HH purchased video game system in last 12 mos	261	5.3%	65
HH owns any Internet video device for TV	819	16.7%	70
Travel (Adults)			
Took domestic trip in continental US last 12 months	4,235	38.9%	74
Took 3+ domestic non-business trips in last 12 months	862	7.9%	67
Spent on domestic vacations in last 12 months: <\$1-999	899	8.3%	77
Spent on domestic vacations in last 12 months: \$1,000-\$1,499	464	4.3%	68
Spent on domestic vacations in last 12 months: \$1,500-\$1,999	265	2.4%	60
Spent on domestic vacations in last 12 months: \$2,000-\$2,999	360	3.3%	79
Spent on domestic vacations in last 12 months: \$3,000+	410	3.8%	58
Domestic travel in last 12 months: used general travel website	440	4.0%	59
Took foreign trip (including Alaska and Hawaii) in last 3 years	1,487	13.7%	50
Took 3+ foreign trips by plane in last 3 years	242	2.2%	41
Spent on foreign vacations in last 12 months: <\$1-999	299	2.7%	59
Spent on foreign vacations in last 12 months: \$1,000-\$2,999	238	2.2%	55
Spent on foreign vacations in last 12 months: \$3,000+	331	3.0%	48
Foreign travel in last 3 years: used general travel website	240	2.2%	38
Nights spent in hotel/motel in last 12 months: any	3,467	31.9%	72
Took cruise of more than one day in last 3 years	572	5.3%	59
Member of any frequent flyer program	713	6.6%	36
Member of any hotel rewards program	1,107	10.2%	57

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Retail MarketPlace Profile

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group

Summary Demographics

2019 Population	13,876
2019 Households	4,897
2019 Median Disposable Income	\$33,246
2019 Per Capita Income	\$20,542

2017 Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$121,925,831	\$287,147,138	-\$165,221,307	-40.4	156
Total Retail Trade	44-45	\$111,073,175	\$274,284,687	-\$163,211,512	-42.4	125
Total Food & Drink	722	\$10,852,656	\$12,862,451	-\$2,009,795	-8.5	31

2017 Industry Group

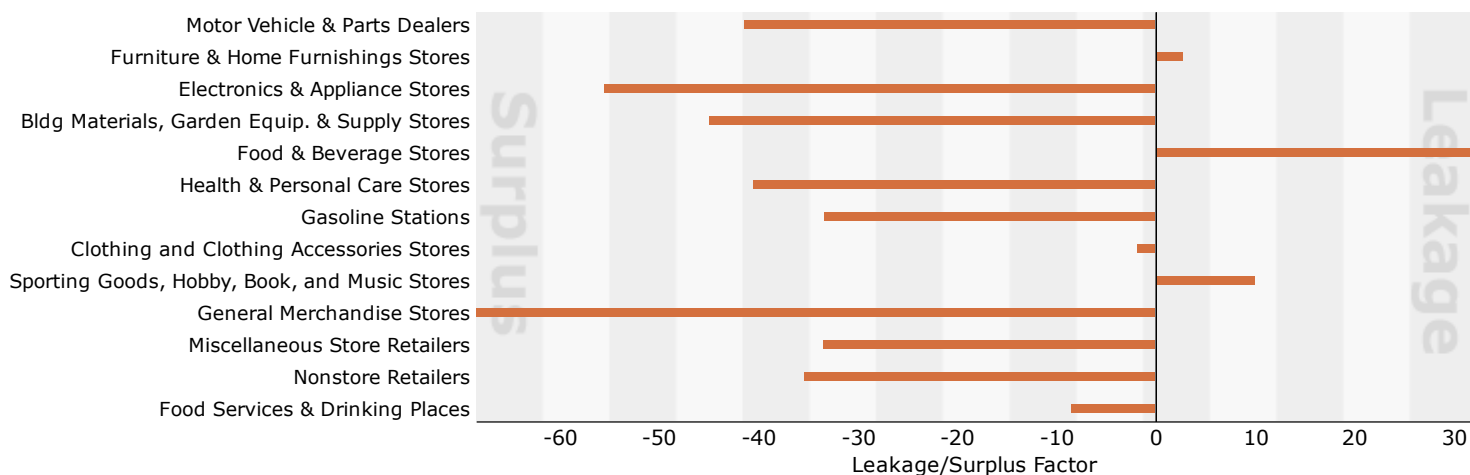
	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$24,866,052	\$60,141,896	-\$35,275,844	-41.5	25
Automobile Dealers	4411	\$20,106,773	\$21,786,234	-\$1,679,461	-4.0	13
Other Motor Vehicle Dealers	4412	\$2,672,934	\$17,555,580	-\$14,882,646	-73.6	5
Auto Parts, Accessories & Tire Stores	4413	\$2,086,345	\$20,800,082	-\$18,713,737	-81.8	7
Furniture & Home Furnishings Stores	442	\$3,248,589	\$3,073,756	\$174,833	2.8	6
Furniture Stores	4421	\$1,958,859	\$2,622,782	-\$663,923	-14.5	5
Home Furnishings Stores	4422	\$1,289,730	\$450,974	\$838,756	48.2	1
Electronics & Appliance Stores	443	\$3,097,123	\$10,864,418	-\$7,767,295	-55.6	8
Bldg Materials, Garden Equip. & Supply Stores	444	\$7,832,715	\$20,667,924	-\$12,835,209	-45.0	7
Bldg Material & Supplies Dealers	4441	\$7,297,248	\$20,667,924	-\$13,370,676	-47.8	7
Lawn & Garden Equip & Supply Stores	4442	\$535,467	\$0	\$535,467	100.0	0
Food & Beverage Stores	445	\$18,299,569	\$9,401,938	\$8,897,631	32.1	11
Grocery Stores	4451	\$16,990,699	\$7,556,058	\$9,434,641	38.4	6
Specialty Food Stores	4452	\$627,601	\$900,929	-\$273,328	-17.9	3
Beer, Wine & Liquor Stores	4453	\$681,269	\$944,951	-\$263,682	-16.2	2
Health & Personal Care Stores	446,4461	\$6,634,107	\$15,758,123	-\$9,124,016	-40.7	8
Gasoline Stations	447,4471	\$13,287,700	\$26,594,290	-\$13,306,590	-33.4	8
Clothing & Clothing Accessories Stores	448	\$4,333,819	\$4,501,352	-\$167,533	-1.9	9
Clothing Stores	4481	\$2,867,640	\$2,282,664	\$584,976	11.4	5
Shoe Stores	4482	\$752,940	\$1,590,703	-\$837,763	-35.7	2
Jewelry, Luggage & Leather Goods Stores	4483	\$713,239	\$627,985	\$85,254	6.4	2
Sporting Goods, Hobby, Book & Music Stores	451	\$3,050,672	\$2,491,603	\$559,069	10.1	6
Sporting Goods/Hobby/Musical Instr Stores	4511	\$2,601,447	\$2,138,589	\$462,858	9.8	5
Book, Periodical & Music Stores	4512	\$449,225	\$353,014	\$96,211	12.0	1
General Merchandise Stores	452	\$20,272,397	\$108,312,875	-\$88,040,478	-68.5	8
Department Stores Excluding Leased Depts.	4521	\$15,168,800	\$98,589,842	-\$83,421,042	-73.3	2
Other General Merchandise Stores	4529	\$5,103,597	\$9,723,033	-\$4,619,436	-31.2	6
Miscellaneous Store Retailers	453	\$4,752,330	\$9,538,203	-\$4,785,873	-33.5	28
Florists	4531	\$289,635	\$2,698,116	-\$2,408,481	-80.6	3
Office Supplies, Stationery & Gift Stores	4532	\$1,040,084	\$456,426	\$583,658	39.0	5
Used Merchandise Stores	4533	\$502,046	\$5,098,388	-\$4,596,342	-82.1	15
Other Miscellaneous Store Retailers	4539	\$2,920,565	\$1,285,273	\$1,635,292	38.9	5
Nonstore Retailers	454	\$1,398,102	\$2,938,309	-\$1,540,207	-35.5	1
Electronic Shopping & Mail-Order Houses	4541	\$830,782	\$0	\$830,782	100.0	0
Vending Machine Operators	4542	\$120,957	\$2,938,309	-\$2,817,352	-92.1	1
Direct Selling Establishments	4543	\$446,363	\$0	\$446,363	100.0	0
Food Services & Drinking Places	722	\$10,852,656	\$12,862,451	-\$2,009,795	-8.5	31
Special Food Services	7223	\$302,460	\$0	\$302,460	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$331,134	\$486,031	-\$154,897	-19.0	3
Restaurants/Other Eating Places	7225	\$10,219,062	\$12,376,420	-\$2,157,358	-9.5	28

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

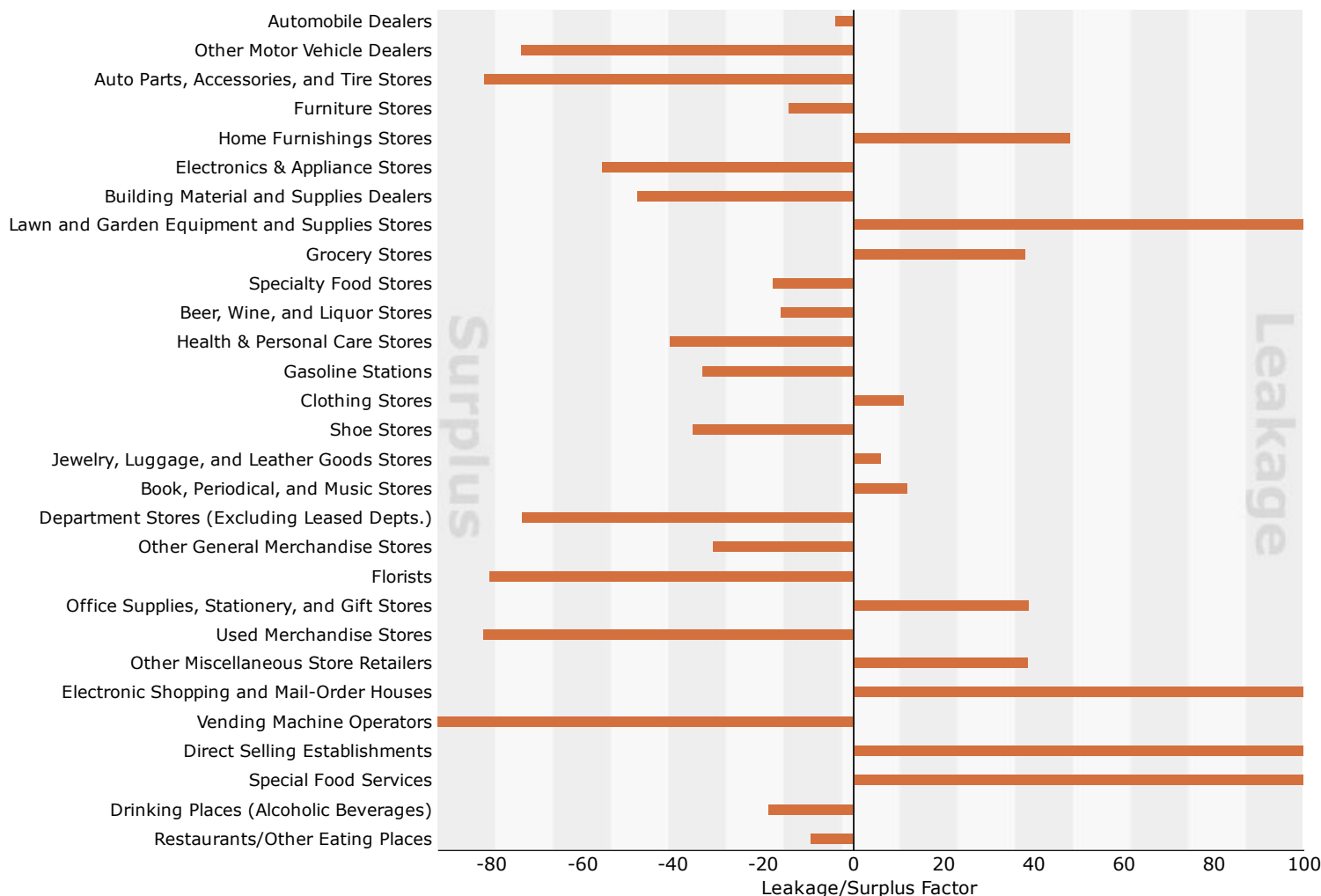
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June 27, 2019

2017 Leakage/Surplus Factor by Industry Subsector



2017 Leakage/Surplus Factor by Industry Group



Retail MarketPlace Profile

Moberly, Missouri
Ring: 5 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

Summary Demographics

2019 Population	17,072
2019 Households	6,124
2019 Median Disposable Income	\$36,330
2019 Per Capita Income	\$21,197

2017 Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$157,693,188	\$322,170,310	-\$164,477,122	-34.3	167
Total Retail Trade	44-45	\$143,731,218	\$309,125,593	-\$165,394,375	-36.5	135
Total Food & Drink	722	\$13,961,971	\$13,044,717	\$917,254	3.4	31

2017 Industry Group

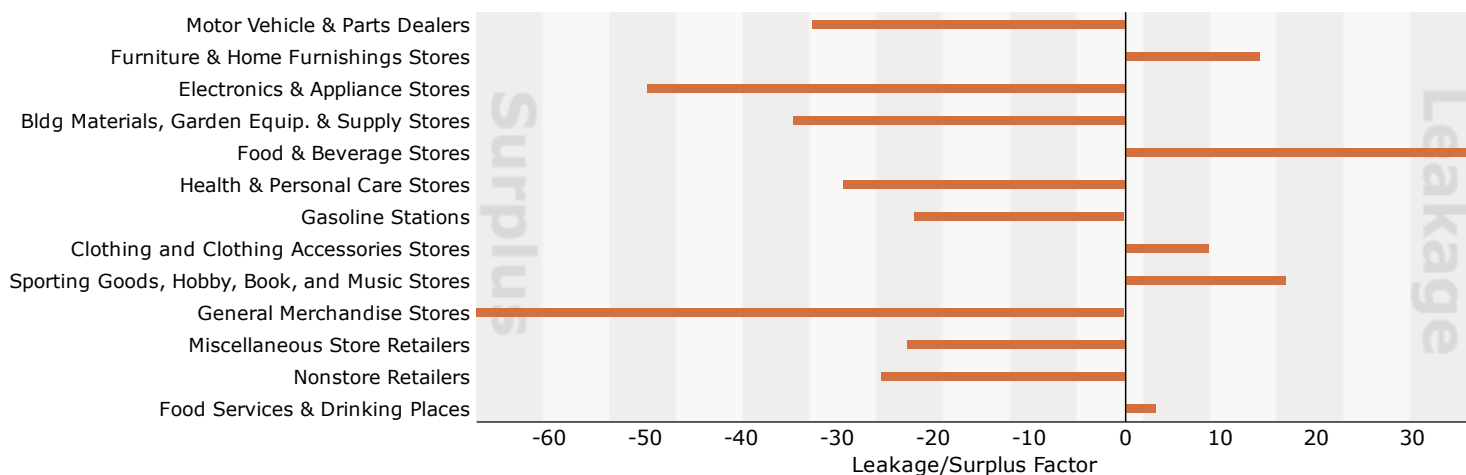
	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$32,372,188	\$63,685,302	-\$31,313,114	-32.6	29
Automobile Dealers	4411	\$26,187,663	\$23,738,694	\$2,448,969	4.9	17
Other Motor Vehicle Dealers	4412	\$3,492,424	\$18,307,353	-\$14,814,929	-68.0	5
Auto Parts, Accessories & Tire Stores	4413	\$2,692,101	\$21,639,255	-\$18,947,154	-77.9	7
Furniture & Home Furnishings Stores	442	\$4,180,468	\$3,138,919	\$1,041,549	14.2	6
Furniture Stores	4421	\$2,508,428	\$2,687,945	-\$179,517	-3.5	5
Home Furnishings Stores	4422	\$1,672,039	\$450,974	\$1,221,065	57.5	1
Electronics & Appliance Stores	443	\$3,962,327	\$11,823,551	-\$7,861,224	-49.8	9
Bldg Materials, Garden Equip. & Supply Stores	444	\$10,326,464	\$21,280,029	-\$10,953,565	-34.7	7
Bldg Material & Supplies Dealers	4441	\$9,629,206	\$21,280,029	-\$11,650,823	-37.7	7
Lawn & Garden Equip & Supply Stores	4442	\$697,257	\$0	\$697,257	100.0	0
Food & Beverage Stores	445	\$23,533,582	\$10,937,203	\$12,596,379	36.5	12
Grocery Stores	4451	\$21,854,573	\$9,091,324	\$12,763,249	41.2	7
Specialty Food Stores	4452	\$806,324	\$900,928	-\$94,604	-5.5	3
Beer, Wine & Liquor Stores	4453	\$872,685	\$944,951	-\$72,266	-4.0	2
Health & Personal Care Stores	446,4461	\$8,597,745	\$15,758,123	-\$7,160,378	-29.4	8
Gasoline Stations	447,4471	\$17,204,973	\$26,925,734	-\$9,720,761	-22.0	8
Clothing & Clothing Accessories Stores	448	\$5,566,897	\$4,654,170	\$912,727	8.9	9
Clothing Stores	4481	\$3,685,740	\$2,435,482	\$1,250,258	20.4	5
Shoe Stores	4482	\$971,910	\$1,590,703	-\$618,793	-24.1	2
Jewelry, Luggage & Leather Goods Stores	4483	\$909,247	\$627,985	\$281,262	18.3	2
Sporting Goods, Hobby, Book & Music Stores	451	\$3,925,727	\$2,788,907	\$1,136,820	16.9	7
Sporting Goods/Hobby/Musical Instr Stores	4511	\$3,355,762	\$2,435,893	\$919,869	15.9	6
Book, Periodical & Music Stores	4512	\$569,964	\$353,014	\$216,950	23.5	1
General Merchandise Stores	452	\$26,112,687	\$135,325,029	-\$109,212,342	-67.6	8
Department Stores Excluding Leased Depts.	4521	\$19,534,281	\$125,009,722	-\$105,475,441	-73.0	2
Other General Merchandise Stores	4529	\$6,578,407	\$10,315,307	-\$3,736,900	-22.1	6
Miscellaneous Store Retailers	453	\$6,145,569	\$9,779,446	-\$3,633,877	-22.8	30
Florists	4531	\$374,614	\$2,768,135	-\$2,393,521	-76.2	4
Office Supplies, Stationery & Gift Stores	4532	\$1,339,132	\$549,603	\$789,529	41.8	6
Used Merchandise Stores	4533	\$640,601	\$5,176,435	-\$4,535,834	-78.0	16
Other Miscellaneous Store Retailers	4539	\$3,791,221	\$1,285,273	\$2,505,948	49.4	5
Nonstore Retailers	454	\$1,802,591	\$3,029,179	-\$1,226,588	-25.4	1
Electronic Shopping & Mail-Order Houses	4541	\$1,066,460	\$0	\$1,066,460	100.0	0
Vending Machine Operators	4542	\$155,420	\$2,938,309	-\$2,782,889	-90.0	1
Direct Selling Establishments	4543	\$580,711	\$0	\$580,711	100.0	0
Food Services & Drinking Places	722	\$13,961,971	\$13,044,717	\$917,254	3.4	31
Special Food Services	7223	\$389,351	\$0	\$389,351	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$419,932	\$486,031	-\$66,099	-7.3	3
Restaurants/Other Eating Places	7225	\$13,152,687	\$12,558,686	\$594,001	2.3	28

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
<http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

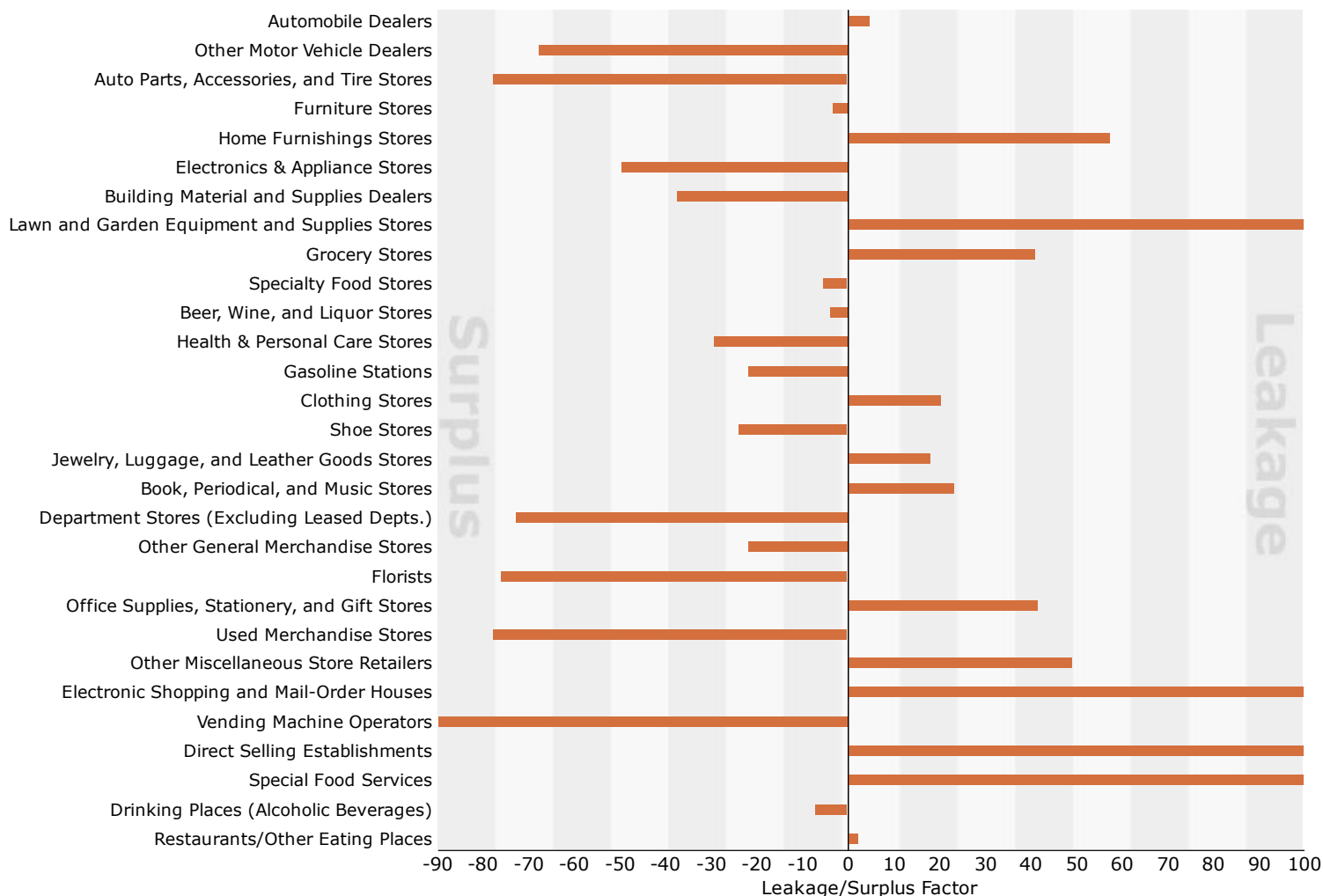
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June 27, 2019

2017 Leakage/Surplus Factor by Industry Subsector



2017 Leakage/Surplus Factor by Industry Group



Retail MarketPlace Profile

Moberly, Missouri
Ring: 10 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

Summary Demographics

2019 Population	23,517
2019 Households	8,511
2019 Median Disposable Income	\$38,353
2019 Per Capita Income	\$21,686

2017 Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$225,751,790	\$339,272,190	-\$113,520,400	-20.1	184
Total Retail Trade	44-45	\$206,079,046	\$325,446,918	-\$119,367,872	-22.5	149
Total Food & Drink	722	\$19,672,744	\$13,825,272	\$5,847,472	17.5	35

2017 Industry Group

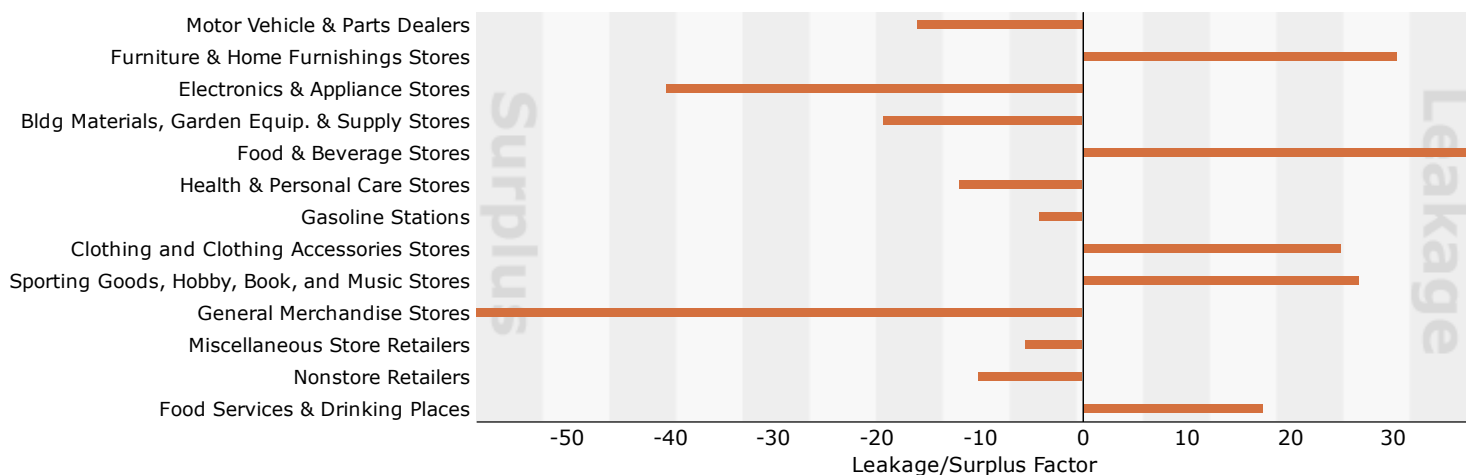
	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$46,975,230	\$65,161,527	-\$18,186,297	-16.2	32
Automobile Dealers	4411	\$38,032,787	\$25,046,804	\$12,985,983	20.6	19
Other Motor Vehicle Dealers	4412	\$5,099,839	\$18,307,353	-\$13,207,514	-56.4	5
Auto Parts, Accessories & Tire Stores	4413	\$3,842,604	\$21,807,370	-\$17,964,766	-70.0	8
Furniture & Home Furnishings Stores	442	\$5,886,413	\$3,138,919	\$2,747,494	30.4	6
Furniture Stores	4421	\$3,513,397	\$2,687,945	\$825,452	13.3	5
Home Furnishings Stores	4422	\$2,373,016	\$450,974	\$1,922,042	68.1	1
Electronics & Appliance Stores	443	\$5,564,008	\$13,130,518	-\$7,566,510	-40.5	11
Bldg Materials, Garden Equip. & Supply Stores	444	\$15,130,583	\$22,413,697	-\$7,283,114	-19.4	9
Bldg Material & Supplies Dealers	4441	\$14,118,579	\$22,372,051	-\$8,253,472	-22.6	8
Lawn & Garden Equip & Supply Stores	4442	\$1,012,004	\$0	\$1,012,004	100.0	0
Food & Beverage Stores	445	\$33,495,317	\$15,081,676	\$18,413,641	37.9	15
Grocery Stores	4451	\$31,119,667	\$13,235,797	\$17,883,870	40.3	10
Specialty Food Stores	4452	\$1,146,223	\$900,928	\$245,295	12.0	3
Beer, Wine & Liquor Stores	4453	\$1,229,426	\$944,951	\$284,475	13.1	2
Health & Personal Care Stores	446,4461	\$12,369,783	\$15,758,123	-\$3,388,340	-12.0	8
Gasoline Stations	447,4471	\$24,771,626	\$26,953,930	-\$2,182,304	-4.2	8
Clothing & Clothing Accessories Stores	448	\$7,808,720	\$4,684,233	\$3,124,487	25.0	9
Clothing Stores	4481	\$5,179,116	\$2,465,545	\$2,713,571	35.5	5
Shoe Stores	4482	\$1,373,198	\$1,590,703	-\$217,505	-7.3	2
Jewelry, Luggage & Leather Goods Stores	4483	\$1,256,406	\$627,985	\$628,421	33.3	2
Sporting Goods, Hobby, Book & Music Stores	451	\$5,557,095	\$3,206,298	\$2,350,797	26.8	8
Sporting Goods/Hobby/Musical Instr Stores	4511	\$4,765,402	\$2,853,284	\$1,912,118	25.1	7
Book, Periodical & Music Stores	4512	\$791,692	\$353,014	\$438,678	38.3	1
General Merchandise Stores	452	\$37,075,747	\$142,829,369	-\$105,753,622	-58.8	9
Department Stores Excluding Leased Depts.	4521	\$27,681,649	\$130,207,092	-\$102,525,443	-64.9	2
Other General Merchandise Stores	4529	\$9,394,099	\$12,622,277	-\$3,228,178	-14.7	7
Miscellaneous Store Retailers	453	\$8,855,336	\$9,911,784	-\$1,056,448	-5.6	31
Florists	4531	\$532,520	\$2,824,150	-\$2,291,630	-68.3	4
Office Supplies, Stationery & Gift Stores	4532	\$1,893,376	\$619,841	\$1,273,535	50.7	6
Used Merchandise Stores	4533	\$893,892	\$5,182,520	-\$4,288,628	-70.6	16
Other Miscellaneous Store Retailers	4539	\$5,535,548	\$1,285,273	\$4,250,275	62.3	5
Nonstore Retailers	454	\$2,589,188	\$3,176,844	-\$587,656	-10.2	2
Electronic Shopping & Mail-Order Houses	4541	\$1,511,195	\$0	\$1,511,195	100.0	0
Vending Machine Operators	4542	\$220,884	\$2,938,309	-\$2,717,425	-86.0	1
Direct Selling Establishments	4543	\$857,108	\$238,535	\$618,573	56.5	1
Food Services & Drinking Places	722	\$19,672,744	\$13,825,272	\$5,847,472	17.5	35
Special Food Services	7223	\$550,193	\$0	\$550,193	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$579,463	\$561,145	\$18,318	1.6	4
Restaurants/Other Eating Places	7225	\$18,543,088	\$13,264,127	\$5,278,961	16.6	31

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

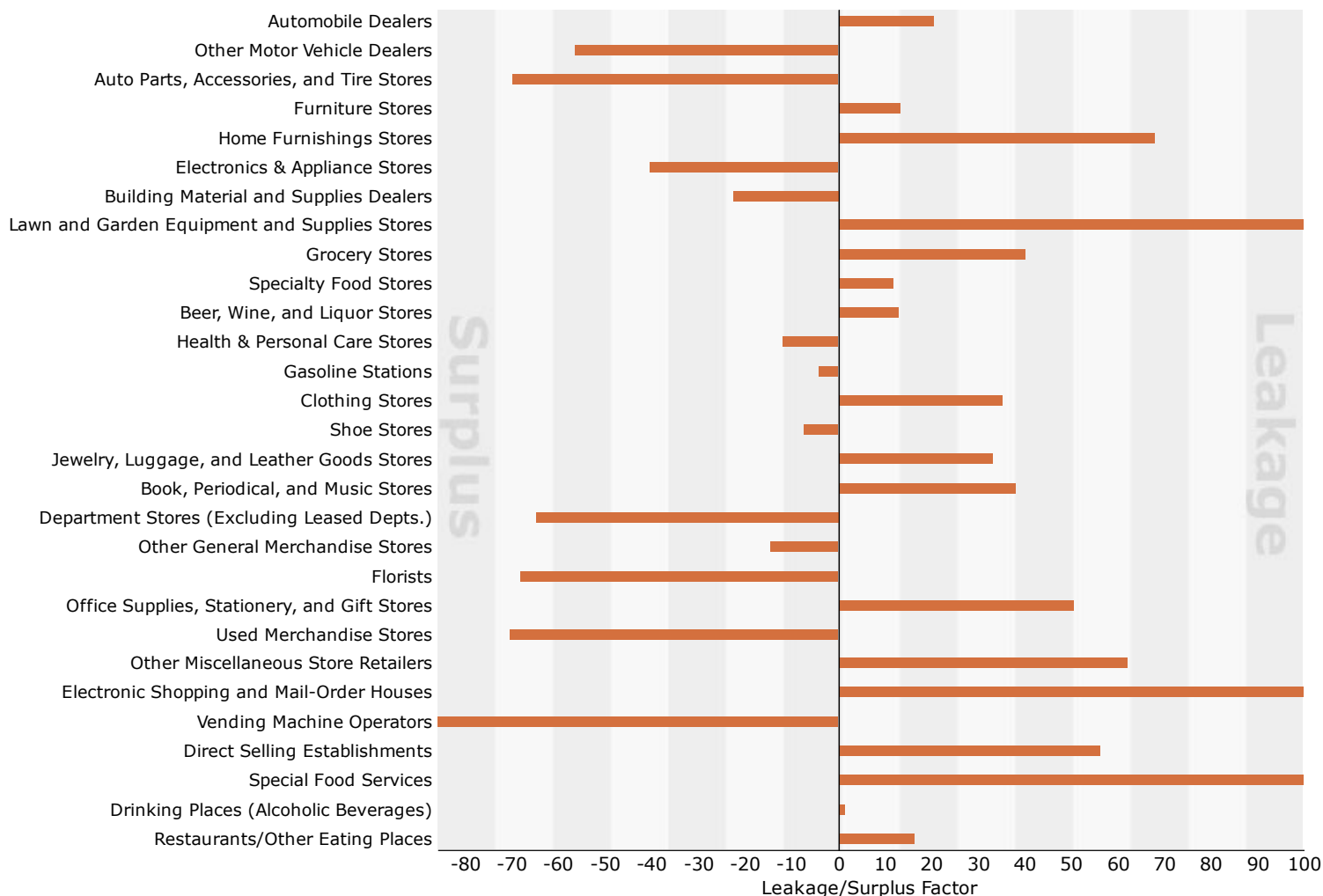
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June 27, 2019

2017 Leakage/Surplus Factor by Industry Subsector



2017 Leakage/Surplus Factor by Industry Group



Retail MarketPlace Profile

Moberly, Missouri
Ring: 15 mile radius

Prepared by GSG Hospitality Group
Latitude: 39.42796
Longitude: -92.43327

Summary Demographics

2019 Population	29,280
2019 Households	10,598
2019 Median Disposable Income	\$39,441
2019 Per Capita Income	\$22,081

2017 Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$291,546,482	\$347,036,157	-\$55,489,675	-8.7	199
Total Retail Trade	44-45	\$266,378,409	\$332,793,818	-\$66,415,409	-11.1	161
Total Food & Drink	722	\$25,168,073	\$14,242,339	\$10,925,734	27.7	37

2017 Industry Group

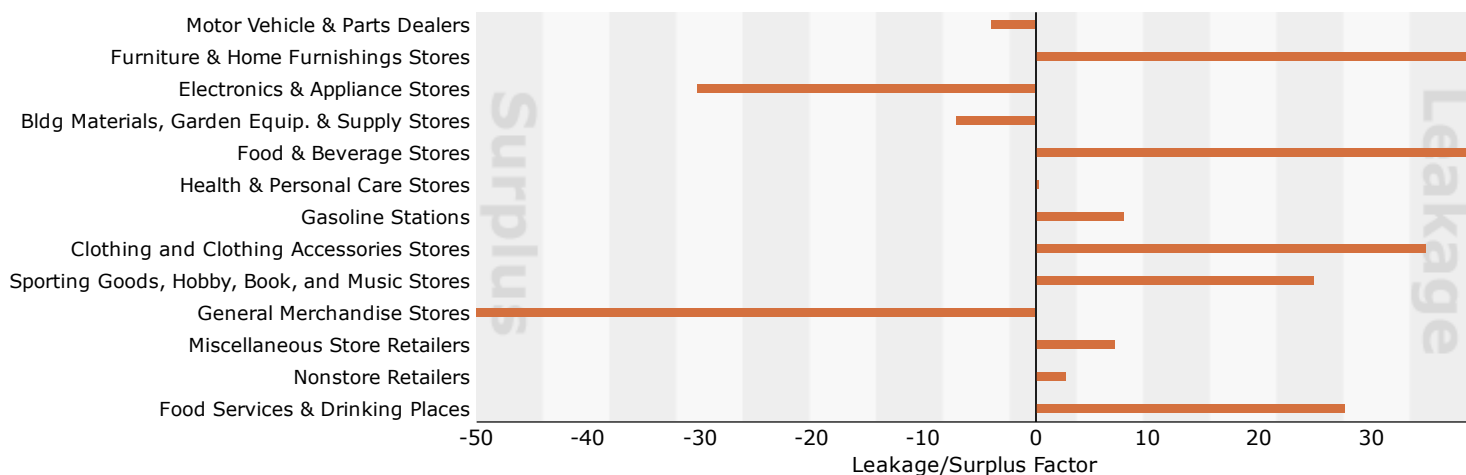
	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$61,110,681	\$66,174,952	-\$5,064,271	-4.0	35
Automobile Dealers	4411	\$49,477,512	\$25,959,441	\$23,518,071	31.2	22
Other Motor Vehicle Dealers	4412	\$6,674,617	\$18,307,353	-\$11,632,736	-46.6	5
Auto Parts, Accessories & Tire Stores	4413	\$4,958,551	\$21,908,158	-\$16,949,607	-63.1	8
Furniture & Home Furnishings Stores	442	\$7,525,234	\$3,278,314	\$4,246,920	39.3	6
Furniture Stores	4421	\$4,470,952	\$2,687,945	\$1,783,007	24.9	5
Home Furnishings Stores	4422	\$3,054,282	\$590,369	\$2,463,913	67.6	1
Electronics & Appliance Stores	443	\$7,117,247	\$13,317,426	-\$6,200,179	-30.3	12
Bldg Materials, Garden Equip. & Supply Stores	444	\$19,810,711	\$22,834,226	-\$3,023,515	-7.1	10
Bldg Material & Supplies Dealers	4441	\$18,486,898	\$22,761,346	-\$4,274,448	-10.4	9
Lawn & Garden Equip & Supply Stores	4442	\$1,323,813	\$72,880	\$1,250,933	89.6	1
Food & Beverage Stores	445	\$43,124,742	\$18,800,830	\$24,323,912	39.3	19
Grocery Stores	4451	\$40,073,706	\$16,865,373	\$23,208,333	40.8	13
Specialty Food Stores	4452	\$1,474,863	\$990,506	\$484,357	19.6	4
Beer, Wine & Liquor Stores	4453	\$1,576,173	\$944,951	\$631,222	25.0	2
Health & Personal Care Stores	446,4461	\$16,018,153	\$15,898,609	\$119,544	0.4	8
Gasoline Stations	447,4471	\$32,043,499	\$27,348,444	\$4,695,055	7.9	8
Clothing & Clothing Accessories Stores	448	\$9,962,938	\$4,796,861	\$5,166,077	35.0	10
Clothing Stores	4481	\$6,610,660	\$2,578,173	\$4,032,487	43.9	6
Shoe Stores	4482	\$1,755,199	\$1,590,703	\$164,496	4.9	2
Jewelry, Luggage & Leather Goods Stores	4483	\$1,597,078	\$627,985	\$969,093	43.6	2
Sporting Goods, Hobby, Book & Music Stores	451	\$7,144,419	\$4,290,080	\$2,854,339	25.0	11
Sporting Goods/Hobby/Musical Instr Stores	4511	\$6,137,850	\$3,937,066	\$2,200,784	21.8	10
Book, Periodical & Music Stores	4512	\$1,006,569	\$353,014	\$653,555	48.1	1
General Merchandise Stores	452	\$47,662,357	\$142,909,078	-\$95,246,721	-50.0	9
Department Stores Excluding Leased Depts.	4521	\$35,543,652	\$130,207,092	-\$94,663,440	-57.1	2
Other General Merchandise Stores	4529	\$12,118,705	\$12,701,986	-\$583,281	-2.3	7
Miscellaneous Store Retailers	453	\$11,495,358	\$9,968,154	\$1,527,204	7.1	32
Florists	4531	\$688,656	\$2,824,150	-\$2,135,494	-60.8	4
Office Supplies, Stationery & Gift Stores	4532	\$2,428,912	\$619,841	\$1,809,071	59.3	6
Used Merchandise Stores	4533	\$1,137,432	\$5,209,157	-\$4,071,725	-64.2	16
Other Miscellaneous Store Retailers	4539	\$7,240,357	\$1,315,006	\$5,925,351	69.3	5
Nonstore Retailers	454	\$3,363,071	\$3,176,844	\$186,227	2.8	2
Electronic Shopping & Mail-Order Houses	4541	\$1,943,815	\$0	\$1,943,815	100.0	0
Vending Machine Operators	4542	\$284,124	\$2,938,309	-\$2,654,185	-82.4	1
Direct Selling Establishments	4543	\$1,135,132	\$238,535	\$896,597	65.3	1
Food Services & Drinking Places	722	\$25,168,073	\$14,242,339	\$10,925,734	27.7	37
Special Food Services	7223	\$706,783	\$0	\$706,783	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$734,446	\$561,145	\$173,301	13.4	4
Restaurants/Other Eating Places	7225	\$23,726,844	\$13,681,194	\$10,045,650	26.9	33

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

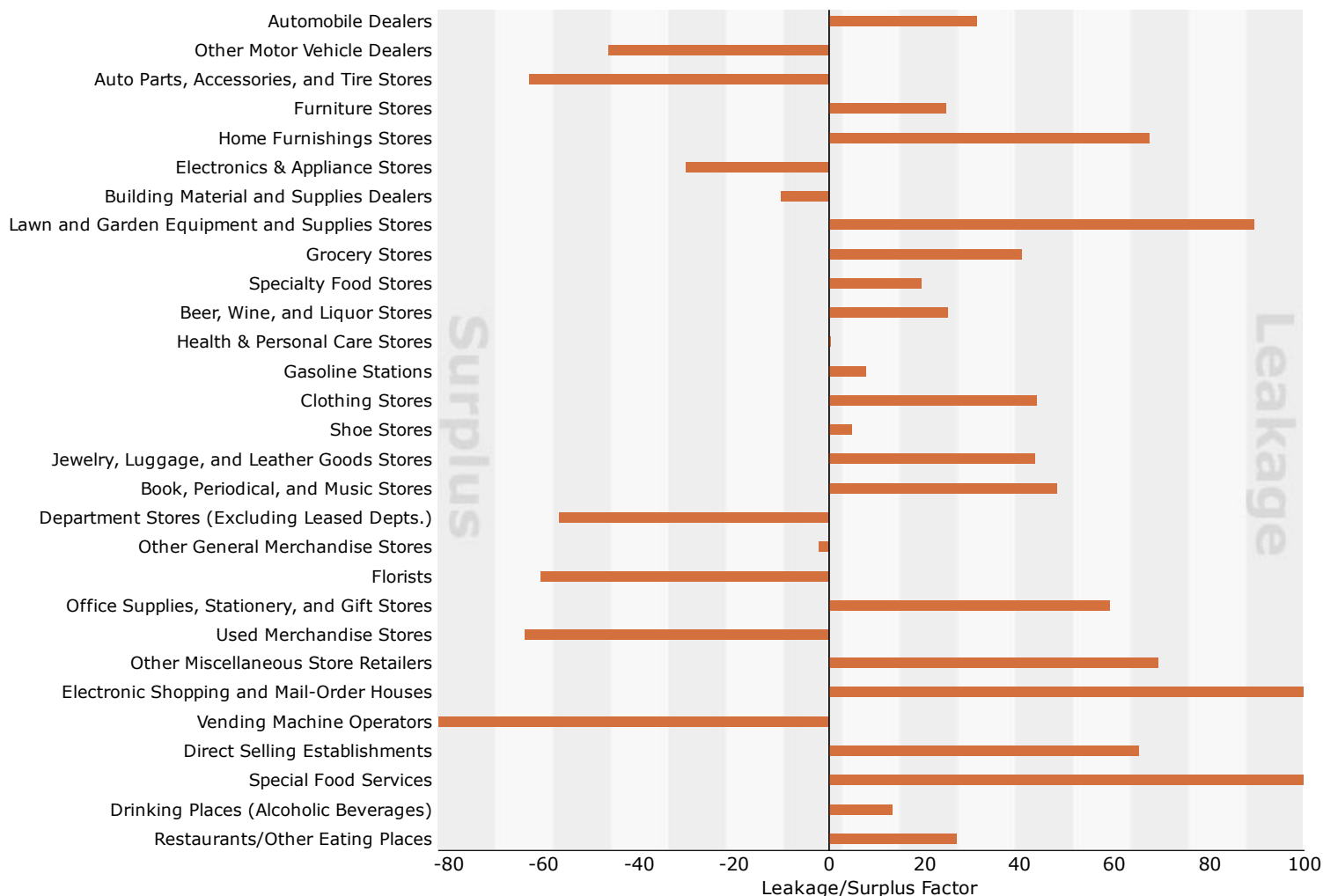
Source: Esri and Infogroup. Esri 2019 Updated Demographics. Esri 2017 Retail MarketPlace. Copyright 2019 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.

June 27, 2019

2017 Leakage/Surplus Factor by Industry Subsector



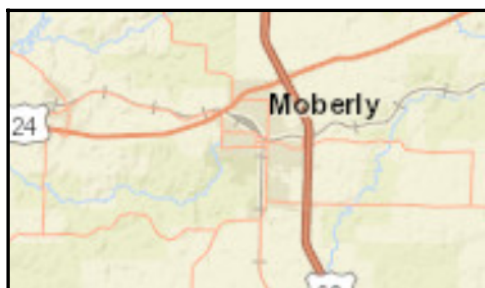
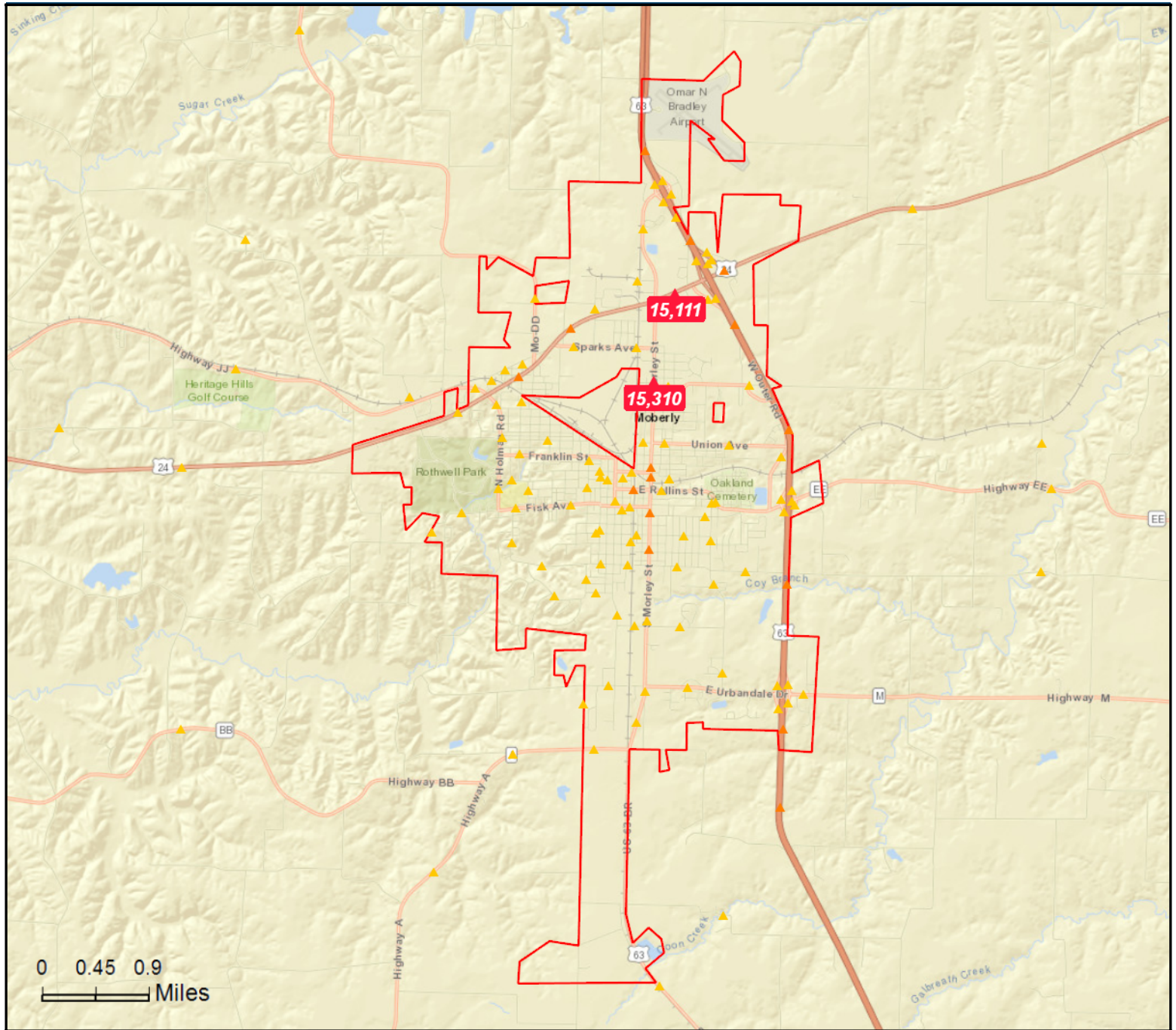
2017 Leakage/Surplus Factor by Industry Group



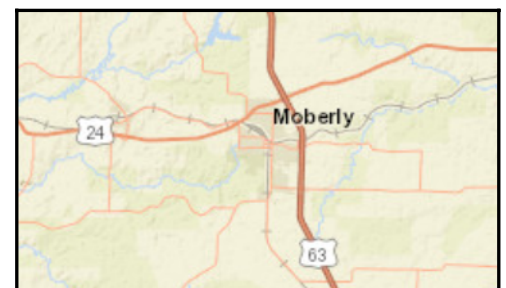
Traffic Count Map

Moberly City, MO
Moberly City, MO (2949034)
Geography: Place

Prepared by GSG Hospitality Group



Average Daily Traffic Volume
 ▲ Up to 6,000 vehicles per day
 ▲ 6,001 - 15,000
 ▲ 15,001 - 30,000
 ▲ 30,001 - 50,000
 ▲ 50,001 - 100,000
 ▲ More than 100,000 per day



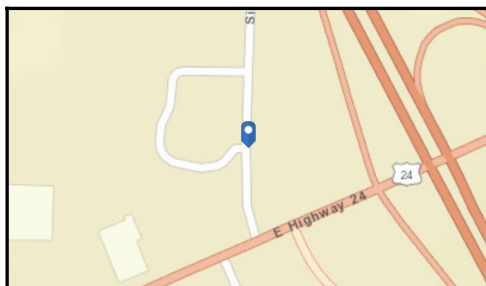
Source: ©2019 Kalibrate Technologies (Q4 2018).

June 25, 2019

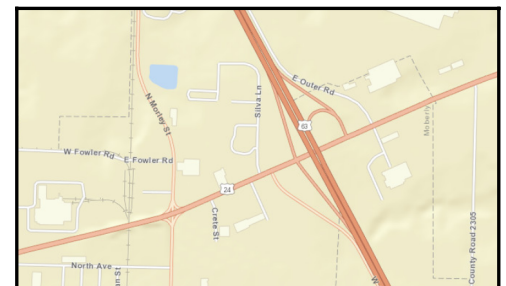
Traffic Count Map - Close Up

Site 1
2040 Silva Ln, Moberly, Missouri, 65270
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.44438
Longitude: -92.42785



Average Daily Traffic Volume
 ▲ Up to 6,000 vehicles per day
 ▲ 6,001 - 15,000
 ▲ 15,001 - 30,000
 ▲ 30,001 - 50,000
 ▲ 50,001 - 100,000
 ▲ More than 100,000 per day



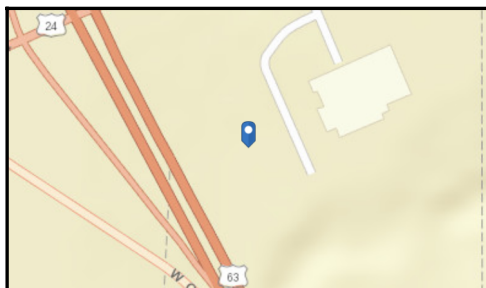
Source: ©2019 Kalibrate Technologies (Q1 2019).

June 27, 2019

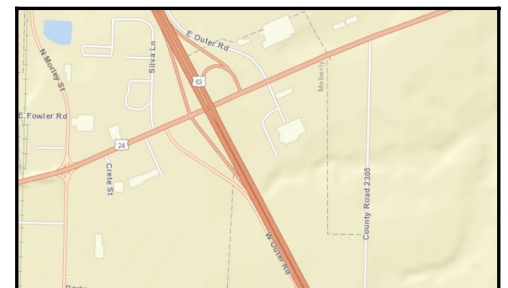
Traffic Count Map - Close Up

Site 2
Moberly, Missouri
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.44236
Longitude: -92.42163



Average Daily Traffic Volume
 ▲ Up to 6,000 vehicles per day
 ▲ 6,001 - 15,000
 ▲ 15,001 - 30,000
 ▲ 30,001 - 50,000
 ▲ 50,001 - 100,000
 ▲ More than 100,000 per day

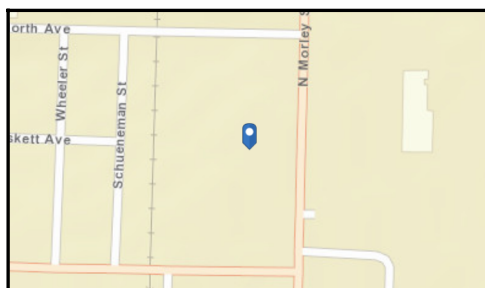
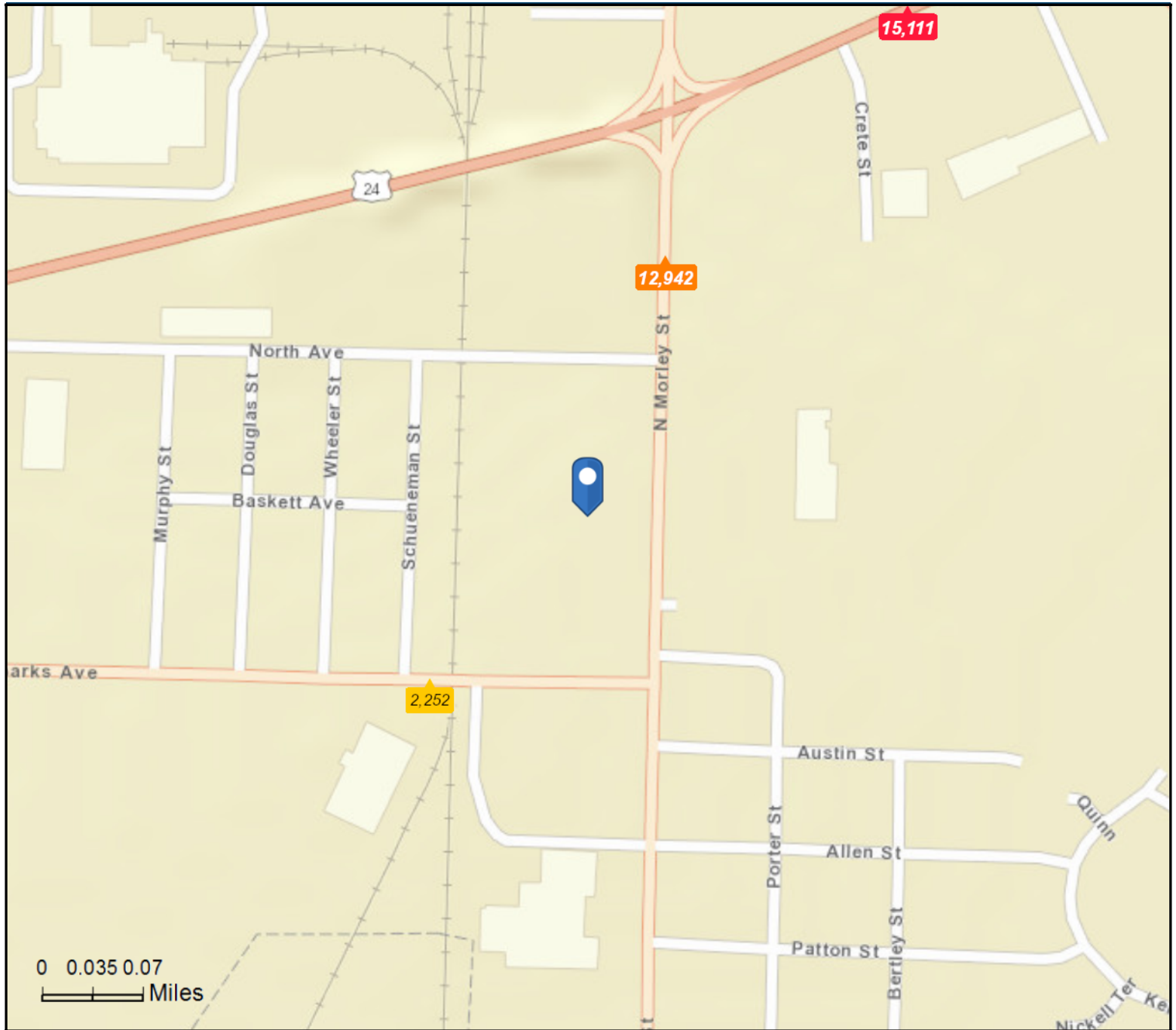


Source: ©2019 Kalibrate Technologies (Q1 2019).

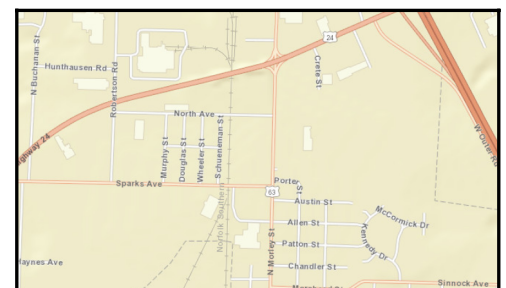
Traffic Count Map - Close Up

Site 3
1519-1699 N Morley St, Moberly, Missouri, 65270
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.43737
Longitude: -92.43390



Average Daily Traffic Volume
 ▲ Up to 6,000 vehicles per day
 ▲ 6,001 - 15,000
 ▲ 15,001 - 30,000
 ▲ 30,001 - 50,000
 ▲ 50,001 - 100,000
 ▲ More than 100,000 per day



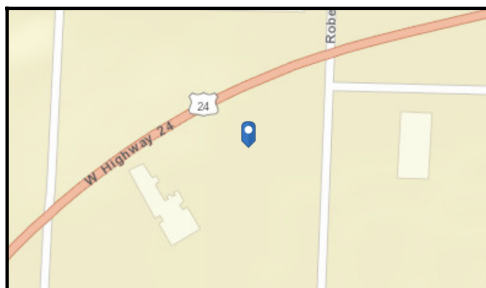
Source: ©2019 Kalibrate Technologies (Q1 2019).

June 27, 2019

Traffic Count Map - Close Up

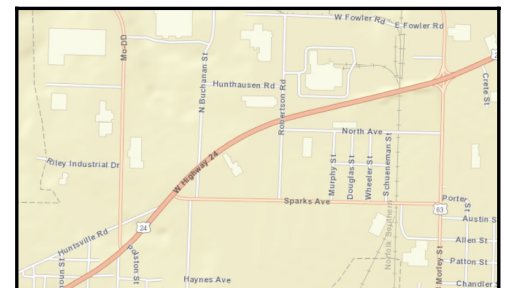
Site 4
700-998 US-24, Moberly, Missouri, 65270
Rings: 5, 10, 15 mile radii

Prepared by GSG Hospitality Group
Latitude: 39.43826
Longitude: -92.44378



Average Daily Traffic Volume

- ▲ Up to 6,000 vehicles per day
- ▲ 6,001 - 15,000
- ▲ 15,001 - 30,000
- ▲ 30,001 - 50,000
- ▲ 50,001 - 100,000
- ▲ More than 100,000 per day



Source: ©2019 Kalibrate Technologies (Q1 2019).

June 27, 2019

RETAIL

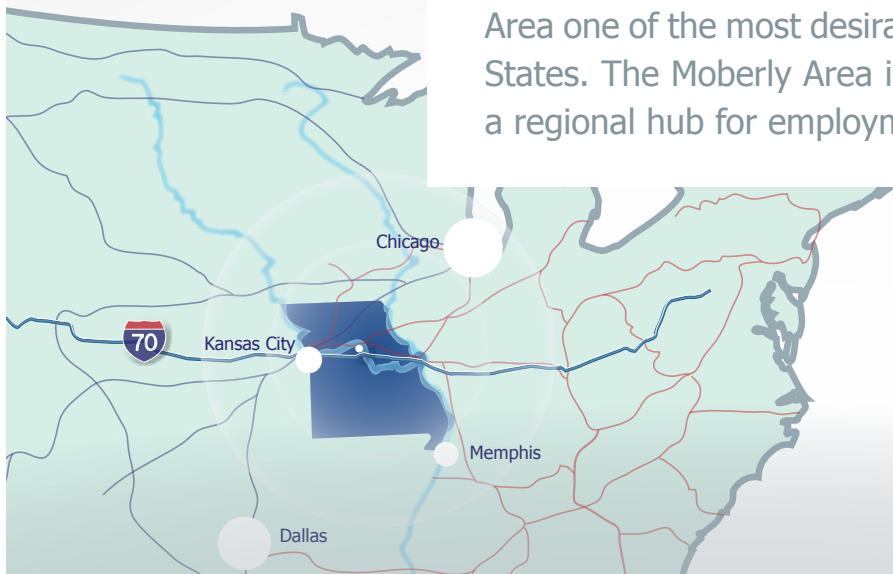
Development Opportunities



Retail Development Opportunities



The Moberly Area is a world-class business location - the heart of the north-central Missouri industry and technology community. Our dynamic companies, well-educated and highly skilled workforce, excellent school systems, and cultural amenities make the Moberly Area one of the most desirable places to live and work in the United States. The Moberly Area is very progressive and has evolved into a regional hub for employment, retail, and entertainment.



10th BEST regulatory environment

Total
demand

\$1,519,653,859

Estimated
household count

50,989



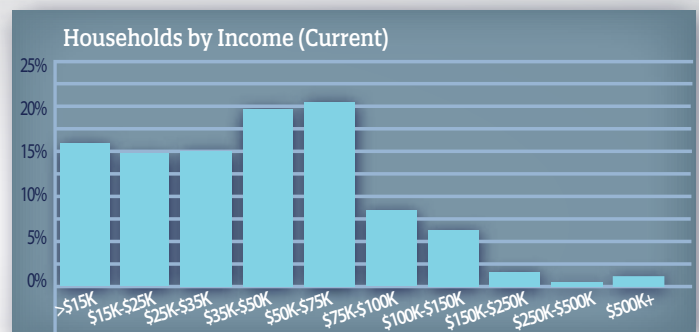
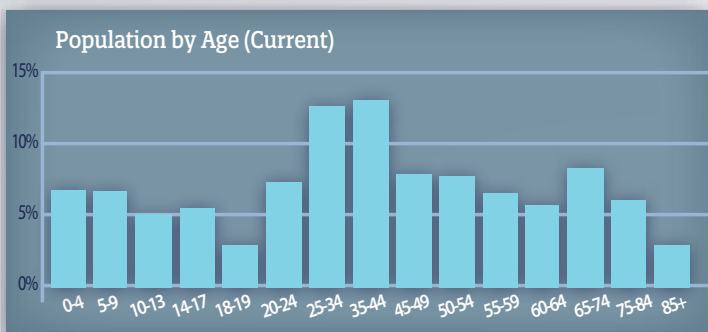
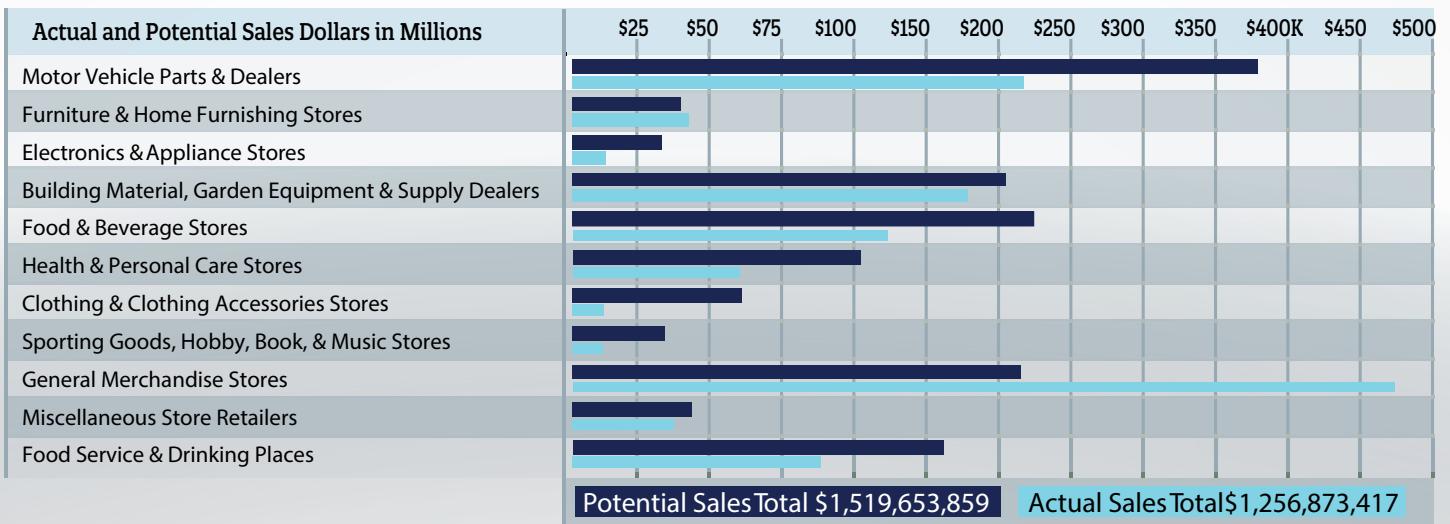
CONTACT :: Phone 660.263.8811
COREY J. MEHAFFY :: Cell 660.998.0097
PRESIDENT :: cmehaffy@moberly-edc.com
Moberly Area EDC :: moberly-edc.com

Why Moberly?

- Centrally located on 4-lane US Highway 63 with connection to 4-lane US Highway 36 and Interstate 70 with a secondary trade area comprising more than 18 communities in a 35 mile radius
- For consumers who live in the primary trade area, the next closest major retail is over 40 miles away offering a significant opportunity for commercial and retail development
- Local, regional and state governments committed to supporting commercial and retail growth
- Home to Moberly Area Community College and Central Christian College of the Bible with enrollments in excess of 6,000 students
- Omar N. Bradley Regional Airport to accommodate executive jet travel

- 20% increase in civilian labor force in the last 10 years with major employers contributing to over a 25% increase in daytime population
- Significant utility infrastructure including community-wide fiber optics
- Major Employers include: Wal-Mart DC, Goodyear, Everlast Worldwide, Wilson Trailer, GE Capital, Dura Automotive, Orscheln Industries, and Mid Am among others
- "Moberly Missouri is leading the nation in job creation..."
Former Missouri Governor Bob Holden

Trade Potential Variables	15 Minute	20 Minute	Secondary
Estimated Household Count	9,365	17,766	50,989
Number of Households in Dominant Segments	7,395	14,581	39,914
Traffic Count	1,5024	15,024	15,024
Total Demand	\$261,217,260	\$526,794,608	\$1,519,653,859
Total Supply	\$330,012,272	\$495,664,578	\$1,256,873,417
Leakage/Surplus	\$68,795,012	(\$31,130,030)	(\$262,780,442)



OPPORTUNITY

Space Available

Site 1

4.6 Acres with frontage to US 24 adjacent to the intersection of US Highway 24 and 4-lane US Highway 63 with visibility from the highway. Current businesses include Rick's Steakhouse and Century 21 McKeown and Associates. Build-to-suit opportunities available and traffic counts in excess of 15,300 per day.

Site 2

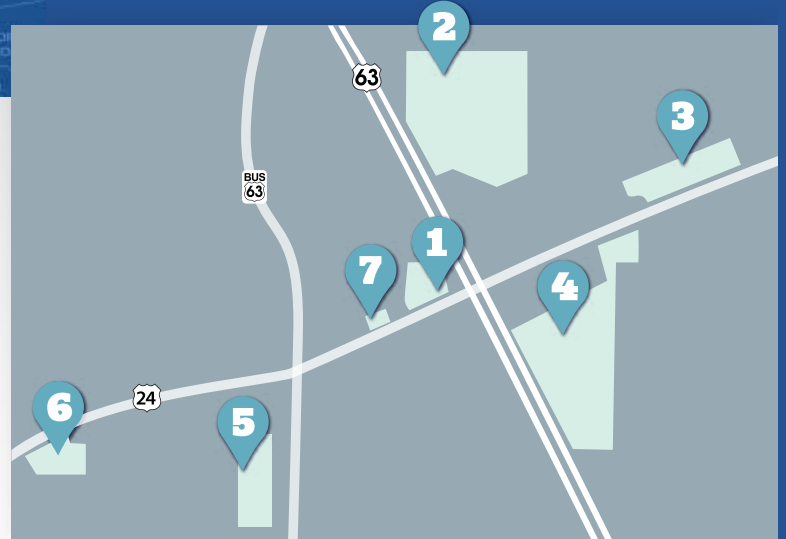
50 acres conveniently located adjacent to the east outer road near the interchange of US Highway 24 and 4-lane US Highway 63 offering superb visibility from Highway 63. Surrounding businesses include Dollar General, Game Stop, US Cellular, and Wal-Mart. Build-to-suit opportunities available and traffic counts in excess of 15,900 per day.

Site 3

13.8 acres with frontage on US Highway 24 located in a high-growth area with traffic counts driven by Wal-Mart Supercenter, Glick's and Pizza Hut. Build-to-suit opportunities and out lots available with traffic counts in excess of 15,900 per day.

Site 4

30 lots from .6 acre to 1.94 acre. Prime retail or office lots. Located in new subdivision now anchored by Lowe's. No side boundary building set-backs so multiple lots can be purchased and a single structure built across the lots. High visibility from US Highway 24 and 4-lane US Highway 63. Build-to-suit opportunities available with traffic counts in excess of 15,900 per day.



Site 5

10.5 acres of prime retail land with frontage on Business 63 including one 1 acre out lot. Surrounding businesses include McDonald's, Long John Silvers, Taco Bell, Burger King, and more. Build-to-suit options available with traffic counts in excess of 15,600 per day.

Site 6

7.1 acres with frontage to US Highway 24 one-half mile from the interchange of Highway 24 and Business 63. Surrounding businesses include Art's Appliance, Do Furniture, and Walgreens. Build-to-Suit options available with traffic counts in excess of 12,600 per day.

Site 7

1.5 acres on Highway 24 less than one-tenth of a mile from 4-lane US Highway 63. Surrounding business include Aldi's, Orscheln Farm & Home, Maurices, Hardee's, and Car-Mart. Build-to-suit opportunities available and traffic counts in excess of 15,300 per day.

Nationally Known Retailers





MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to a Contract with Artisan Graham for the sale of the City-owned lots in the Maple Grove Subdivision (Houseman, City Manager)

BACKGROUND

In November 2024, the City Council approved a Preliminary Plat for the Maple Grove Subdivision. This plat consists of eight total parcels, six of which are owned by the City of Fort Atkinson with the remaining two owned by the Fort Atkinson School District. For additional information, the staff report from the November 19, 2024 City Council meeting and the November 12, 2024 Plan Commission meeting are attached to this memo.

DISCUSSION

The subdivision plat has now been recorded, and the City-owned parcels are ready for sale. In November, staff anticipated being able to sell these lots without the assistance of a Realtor. However, due to staffing vacancies and limited capacity, staff is proposing to enter into an agreement with Artisan Graham to represent the City for the sale of the six City-owned parcels. Further, in November staff recommended that the sale price of each parcel be \$55,000. However, upon advice from the professionals at Artisan Graham, the sale price of \$40,000 is more realistic in this market for the size and location of these parcels.

The parcels are located in the TF-10, Two-flat Residential District, which allows for single-family dwellings and two-flat dwellings. The latter must be an upper and lower residential unit. Traditional side-by-side duplexes are not permitted in this zoning district. Also, there are deed restrictions on these parcels that dictate the style of the structures to ensure that they match the existing well-established neighborhood. The goal of this project is to sell the parcels and encourage prompt development. As such, the deed restrictions include timelines for building permit applications, construction, and completion.

FINANCIAL ANALYSIS

Staff proposes to list these parcels for \$40,000 each. Per the attached contract, Artisan Graham's commission will be 3.5% if the listing firm is able to procure the buyer, and 2.4% if there is a buyers agent involved. The proceeds from the sale of the parcels will be returned to

the General Fund (Fund 1), Wastewater Utility Fund (Fund 2), and Water Utility Fund (Fund 3) in the proportion of which these funds paid for the Grove and Maple street improvements that made the creation of the parcels possible. The majority of the improvements needed in the area were for the sanitary sewer.

RECOMMENDATION

Staff recommends the City Council approve the contract with Artisan Graham to sell the City-owned parcels in the Maple Grove Subdivision and authorize the City Manager and City Attorney to execute closing contracts for the sale of the lots.

ATTACHMENTS

1. 11.19.24 Prelim Plat Council Packet w Deed Restrictions
2. WB-3 Vacant Land Listing Contract 2025
3. Grove St Subdivision Plat 2025

MEMORANDUM

DATE: November 19, 2024

TO: Fort Atkinson City Council

FROM: Andy Selle, Director of Public Works

RE: Review and possible action relating to the Preliminary Plat Review for 611 and 609 Grove Street (Selle, Director of Public Works)

BACKGROUND

Section 70.05.02 and 70.06.01 of the City of Fort Atkinson Land Division and Development Ordinance outlines the requirements for a Preliminary Plat review and approval by the Plan Commission and City Council for conformance with all ordinances, plans, and document requirements.



DISCUSSION

The Fort Atkinson Plan Commission recommended approval of the Preliminary Plat at a meeting on November 12, 2024. There are eight lots total, six owned by the City. City staff plan to put the six lots up for sale individually upon approval of this plat, with all potential sale transactions coming before Council for approval. Note the proposed deed restrictions included in the

packet. The goals of these restrictions are to ensure that the design and use of the buildings fit with the character of the neighborhood and that they are built on promptly.

FINANCIAL ANALYSIS

Each lot is about 0.2 AC and is considered an in-fill lot. Based on similar, vacant, lots with stubbed sewer and water in the surrounding area, staff estimate a listing price of around \$55,000 for an initial entry into the market. Staff intends to use the services of the City Attorney to represent the City in these sales and closing documents.

RECOMMENDATION

City staff recommends approval of the Preliminary Plat, subject to any conditions the Council may decide to add. In addition, staff recommend Council authorize listing the parcels for sale at the starting price of \$55,000 per parcel with the deed restrictions attached.

ATTACHMENTS

1. Plan Commission Memorandum Plat
2. Preliminary Plat
3. Deed Restrictions
4. Central Neighborhood Planning Area
5. Future Land Use Map



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

PRELIMINARY PLAT REVIEW REPORT TO THE PLAN COMMISSION

DATE: November 12, 2024

PROPERTY ADDRESS: 611 Grove Street and 609 Grove Street

PARCEL NUMBER: 226-0514-0441-091 and 226-0514-0441-0138

OWNER: City of Fort Atkinson and Fort Atkinson School District

APPLICANT: City of Fort Atkinson and Fort Atkinson School District

FILE NUMBER: PPR-2024-01

EXISTING ZONING: TF-10, Two Flat Residential

PROPOSED ZONING: No change

EXISTING LAND USE: Community Gardens and School District Office Building

REQUESTED USES: Single-Family or Two-Family Residential

BACKGROUND

Section 70.05.02 and 70.06.01 of the City of Fort Atkinson Land Division and Development Ordinance outlines the requirements a Preliminary Plat review and approval by the Plan Commission and City Council for conformance with all ordinances, plans, and document requirements.

The aerial photo below shows the current configuration of the subject property. Parcel 41-091 is owned by the City, and parcel 41-138 is owned by the School District. Grove Street is along the left side of the photo (west), and Maple Street is along the right side (east).



REQUEST OVERVIEW

The City of Fort Atkinson and Fort Atkinson School District are proposing to reconfigure and subdivide two existing parcels within an existing residential neighborhood block between Maple Street and Grove Street, near Jones Park.

The larger parcel (1.24-acres) had been used for community garden spaces operated by the City of Fort Atkinson and the smaller parcel (0.36-acres) is being used for Crossroads Pathways by the Fort Atkinson School District. The proposed preliminary plat involves subdividing this total area (1.6-acre) into eight total new parcels ranging in size from 8,600 – 8,800 square feet for the future development of single-family or two-family homes. Both existing properties and the entire residential block is zoned TF-10, which accommodates single-family or two-family land uses by-right.

No public notice is required for a Preliminary Plat review and action.

PRELIMINARY PLAT REVIEW:

The proposed Preliminary Plat is planned to create 8 new development parcels, four of which front Grove Street and four that front Maple Street. The Land Division and Development Code requires that the Preliminary Plat be reviewed by the Plan Commission for consistency with all other ordinances, laws, rules, regulations, and plans. A Preliminary Plat is required to subdivide land into five or more new parcels. Following the review and approval of the Preliminary Plat by the City, it will be reviewed by the State and County. A Final Plat, inclusive of any requested changes of any reviewing party, is then brought before the Plan Commission and City Council for action. This two-step process ensures that all requirements are met prior to the land division being recorded.

The Zoning Ordinance has minimum and maximum density, intensity, and bulk regulations for all properties in the City. As shown below, the proposed Preliminary Plat subdivides the land into new development parcels that meet the Zoning Ordinance's minimum requirements.

Bulk Regulation	TF-10 Standard	Proposed New Parcels
Minimum Lot Area	7,200 square feet	8,600-8,800 square feet
Minimum Lot Width	65 feet	65-66 feet
Minimum Lot Depth	120 feet	132 feet
Minimum Lot Frontage at ROW	30 feet	65-66 feet

Because this is an infill development within an existing developed residential neighborhood block, there are no proposed changes to public right-of-way, easements, or block layout with the submitted Preliminary Plat. Thus, these ordinance standards are not applicable for the proposed project. For individual lots, ordinance requirements mainly include compliance with the minimum Zoning District standards as noted above.

COMPREHENSIVE LAND USE PLAN (2019):

The subject properties are located within the Central Neighborhoods Planning Area and is shown as Neighborhood on the Plan graphic (see attachments). The opportunities indicated on the plan include urban living experience, neighborhood character, and historic preservation balanced with modernization.

The subject properties are also shown as Parks and Community Facilities on the Future Land Use Map. While these land use designations are reflective of the existing use of the properties today, the entire existing residential block in this area is shown as Two Family Residential. This is reflective of the future proposed uses of the property with the Preliminary Plat and matches the existing Zoning of the properties and their surroundings (TF-10). No zoning change is proposed as part of the Preliminary Plat and thus, no Comprehensive Plan Amendment is required in this instance. When the Comprehensive Plan is updated next, this land use designation will be changed to reflect existing Zoning designation and the Preliminary Plat.

Staff believes the proposal is in concert with the Comprehensive Plan.

DISCUSSION

The City of Fort Atkinson and the Fort Atkinson School District have developed a reuse plan for these properties that is consistent with existing developed portions of this residential neighborhood and provides new housing opportunities on an infill site within the City's existing boundaries. An infill development like this provides many benefits in terms of bringing these properties back onto the City's tax rolls, creating new housing opportunities, leveraging existing infrastructure and utilities, and providing new residents with access to parks, schools, and employment.

Additionally, a set of Draft Deed Restrictions has been developed that creates standards for architectural design of the new homes, construction timelines, and continued compliance with the City's Zoning Ordinance requirements. This ensures design consistency with the existing neighborhood development in the area and prompt development of the properties following approvals.

The City's Management Team has reviewed the application, and all comments have been included within this document. Overall, the proposed Preliminary Plat meets the requirements of the City's ordinances, is in alignment with adopted City plans, and will provide many additional benefits as a residential infill project.

RECOMMENDATION

City staff recommends approval of the Preliminary Plat, subject to the following conditions:

- Any other recommendations of City staff and the Plan Commission.

ATTACHMENTS

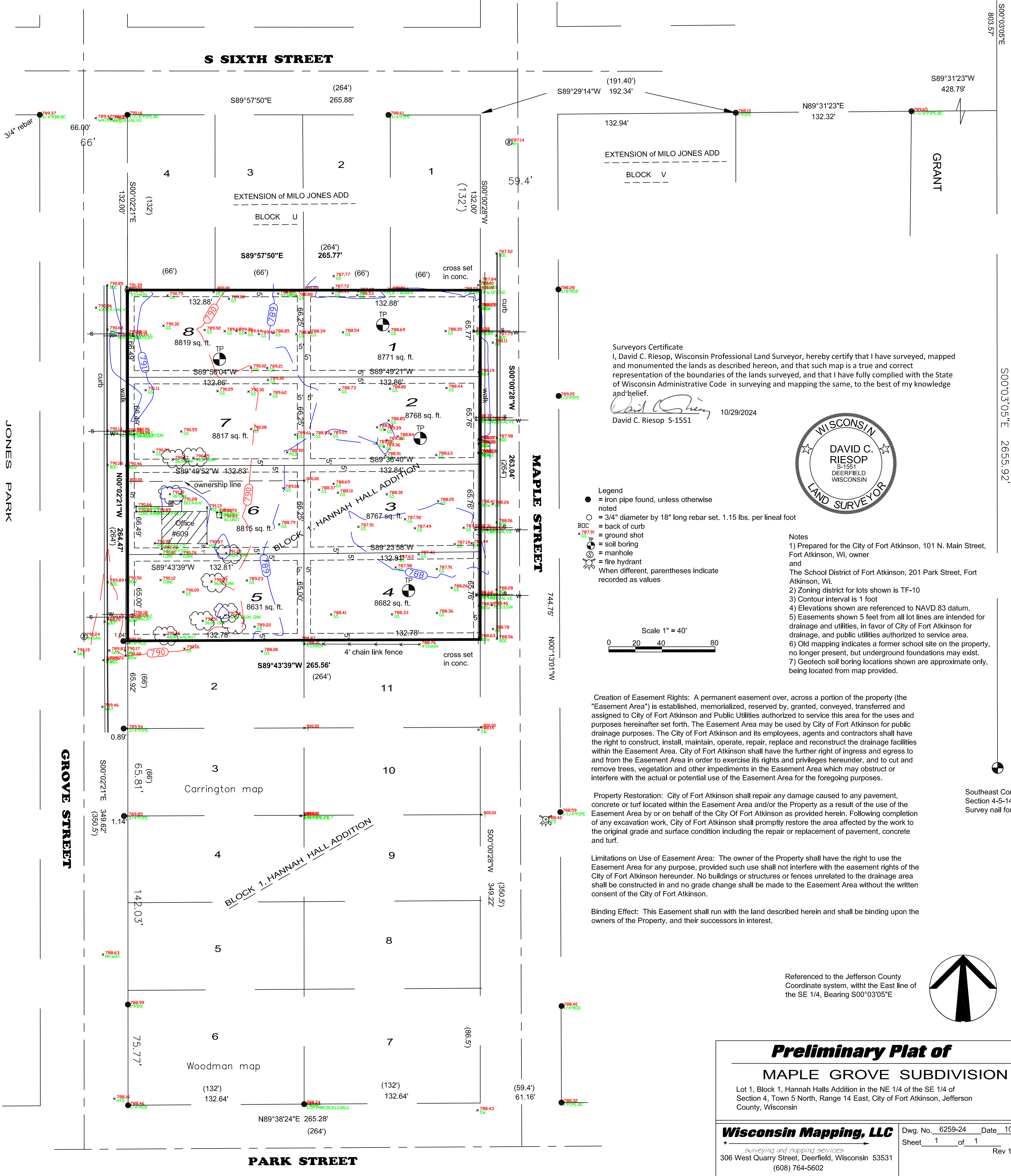
1. Preliminary Plat
2. Deed Restrictions
3. Central Neighborhood Planning Area
4. Future Land Use Map

Location Map, SE 1/4,
Section 4, Town 5 North,
Range 14 East

Map Not to Scale

Bulk Regulations (TF-10) Two flat Residential district
Minimum Lot Area 7,200 sq. ft.
Maximum Impervious Surface Ratio 70 percent
Minimum Green Space 30 percent
Maximum Building Coverage 35 percent
Minimum Lot Width 65 feet
Minimum Lot Depth 120 feet
Minimum Lot Frontage at street 30 feet
Minimum Front Setback 25 feet
Minimum Porch Setback 17 feet
Minimum Side Setback 8 feet
Minimum Rear Setback 25 feet
Maximum Principal Building Height 40 feet
Minimum Pavement Setback 5 foot on side and rear yards, 10 feet at street
Minimum Dwelling Unit Structure Area 800 square feet

East 1/4 corner,
Section 4-5-14,
Aluminum Monument
Found

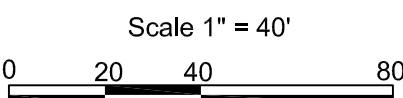


Surveyors Certificate
I, David C. Riesop, Wisconsin Professional Land Surveyor, hereby certify that I have surveyed, mapped and monumented the lands as described hereon, and that such map is a true and correct representation of the boundaries of the lands surveyed, and that I have fully complied with the State of Wisconsin Administrative Code in surveying and mapping the same, to the best of my knowledge and belief.

David C. Riesop
David C. Riesop S-1551 10/29/2024



- Legend
- = iron pipe found, unless otherwise noted
 - = 3/4" diameter by 18" long rebar set. 1.15 lbs. per lineal foot
 - BDC = back of curb
 - × = ground shot
 - ⊙ = soil boring
 - ⊕ = manhole
 - ⊙ = fire hydrant
 - When different, parentheses indicate recorded as values



- Notes
- 1) Prepared for the City of Fort Atkinson, 101 N. Main Street, Fort Atkinson, WI, owner and
 - 2) Zoning district for lots shown is TF-10
 - 3) Contour interval is 1 foot
 - 4) Elevations shown are referenced to NAVD 83 datum.
 - 5) Easements shown 5 feet from all lot lines are intended for drainage and utilities, in favor of City of Fort Atkinson for drainage, and public utilities authorized to service area.
 - 6) Old mapping indicates a former school site on the property, no longer present, but underground foundations may exist.
 - 7) Geotech soil boring locations shown are approximate only, being located from map provided.

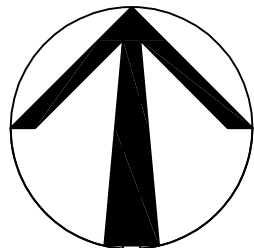
Creation of Easement Rights: A permanent easement over, across a portion of the property (the "Easement Area") is established, memorialized, reserved by, granted, conveyed, transferred and assigned to City of Fort Atkinson and Public Utilities authorized to service this area for the uses and purposes hereinafter set forth. The Easement Area may be used by City of Fort Atkinson for public drainage purposes. The City of Fort Atkinson and its employees, agents and contractors shall have the right to construct, install, maintain, operate, repair, replace and reconstruct the drainage facilities within the Easement Area. City of Fort Atkinson shall have the further right of ingress and egress to and from the Easement Area in order to exercise its rights and privileges hereunder, and to cut and remove trees, vegetation and other impediments in the Easement Area which may obstruct or interfere with the actual or potential use of the Easement Area for the foregoing purposes.

Property Restoration: City of Fort Atkinson shall repair any damage caused to any pavement, concrete or turf located within the Easement Area and/or the Property as a result of the use of the Easement Area by or on behalf of the City Of Fort Atkinson as provided herein. Following completion of any excavation work, City of Fort Atkinson shall promptly restore the area affected by the work to the original grade and surface condition including the repair or replacement of pavement, concrete and turf.

Limitations on Use of Easement Area: The owner of the Property shall have the right to use the Easement Area for any purpose, provided such use shall not interfere with the easement rights of the City of Fort Atkinson hereunder. No buildings or structures or fences unrelated to the drainage area shall be constructed in and no grade change shall be made to the Easement Area without the written consent of the City of Fort Atkinson.

Binding Effect: This Easement shall run with the land described herein and shall be binding upon the owners of the Property, and their successors in interest.

Referenced to the Jefferson County
Coordinate system, with the East line of
the SE 1/4, Bearing S00°03'05"E



Preliminary Plat of MAPLE GROVE SUBDIVISION

Lot 1, Block 1, Hannah Halls Addition in the NE 1/4 of the SE 1/4 of
Section 4, Town 5 North, Range 14 East, City of Fort Atkinson, Jefferson
County, Wisconsin

Wisconsin Mapping, LLC
* surveying and mapping services *
306 West Quarry Street, Deerfield, Wisconsin 53531
(608) 764-5602

Dwg. No. 6259-24 Date 10/9/2024
Sheet 1 of 1 Rev 10/29/24

	DEED RESTRICTIONS

These deed restrictions are placed upon the property described below by the CITY OF FORT ATKINSON hereinafter the ("CITY") detailing the desires of the CITY in the development of the following described real estate located in the City of Fort Atkinson, Jefferson County, Wisconsin:

Return to:
David R. Westrick
Rogers & Westrick SC
93 N. Main St
Fort Atkinson, WI 53538

Parcel ID Numbers

SEE ATTACHED EXHIBIT A

The restrictions shall be as follows:

1. New residential structures must meet the requirements of the CITY'S Zoning Ordinance and must be either a single-family residence or a two-flat residence. The architectural style of the structure must be compatible with the existing neighborhood. Acceptable styles include Craftsman, Cape Cod, Tudor, Arts and Crafts, Bungalow, and Prairie. CITY staff must approve the building elevations, façade, and floor plans of the structure prior to approval of building permits.
2. Construction of the residential structure must begin within six months from the date of closing.
3. Construction of the residential structure must be complete and an Occupancy Permit granted within 18 months from the date of the approved building permit.
4. The CITY retains the right to repurchase the lot and/or any improvements thereon if 2) or 3) above are not achieved at the same purchase price.

5. The CITY can extend the timeline on restrictions 2 and 3 above by six months if mutually agreed upon by the purchaser and the CITY.
6. These restrictions are permanent.

IN WITNESS WHEREOF, these restrictions are declared and entered into this _____ day of _____, 2024.

CITY OF FORT ATKINSON

Rebecca Housman, City Manager

STATE OF WISCONSIN

JEFFERSON COUNTY

Personally came before me this _____ day of _____, 2024, the above-named individual to be known to be the person who executed the foregoing instrument and acknowledged the same.

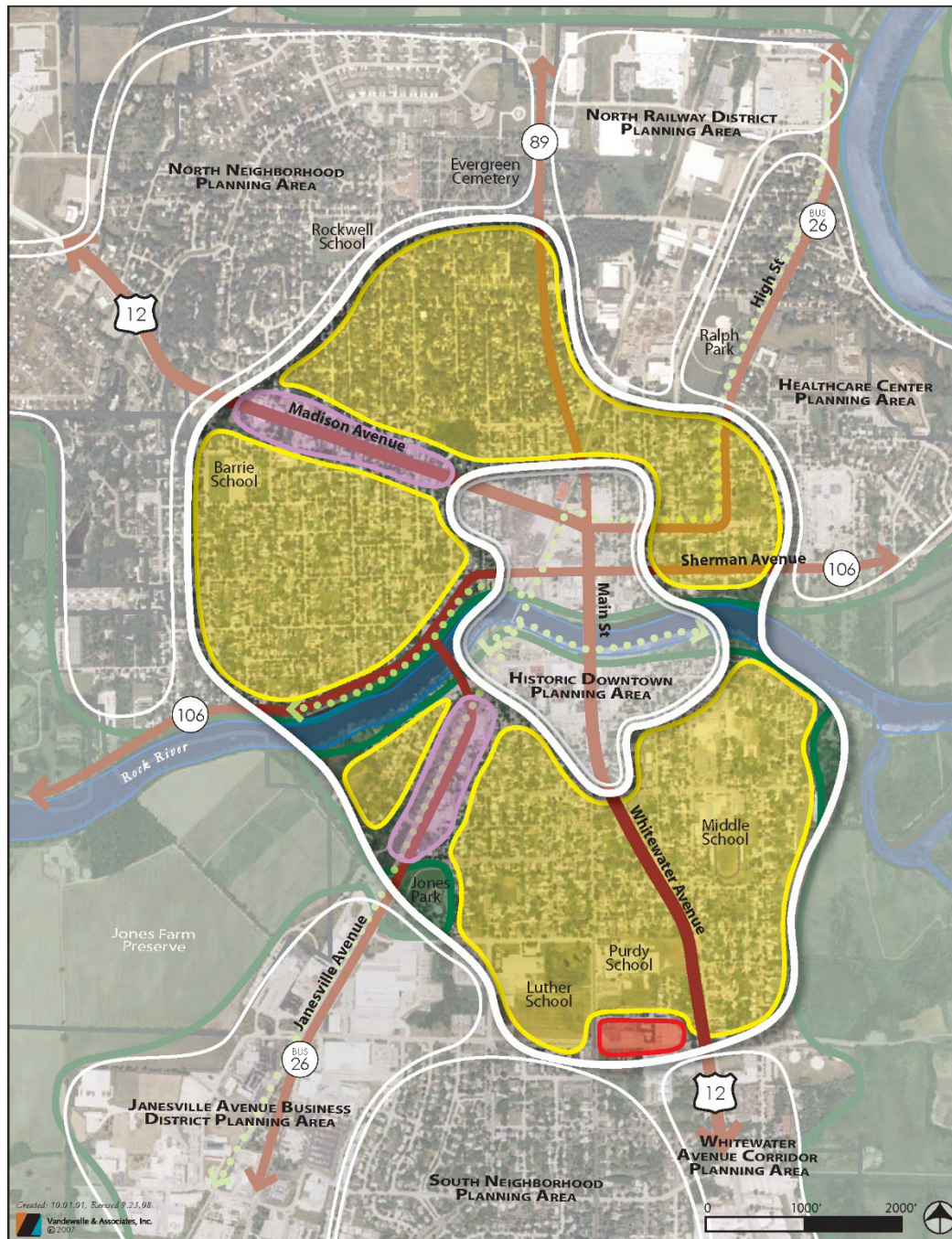
Notary Public, State of Wisconsin
My Commission Expires: _____

This document was drafted by
David R. Westrick
Rogers & Westrick SC
93 N. Main St.
Fort Atkinson, WI 53538
920-563-5577
drw@rogerswestricklawoffice.com

CENTRAL NEIGHBORHOODS PLANNING AREA

FIGURE: 2.16

CITY OF FORT ATKINSON
FUTURES OPEN HOUSE



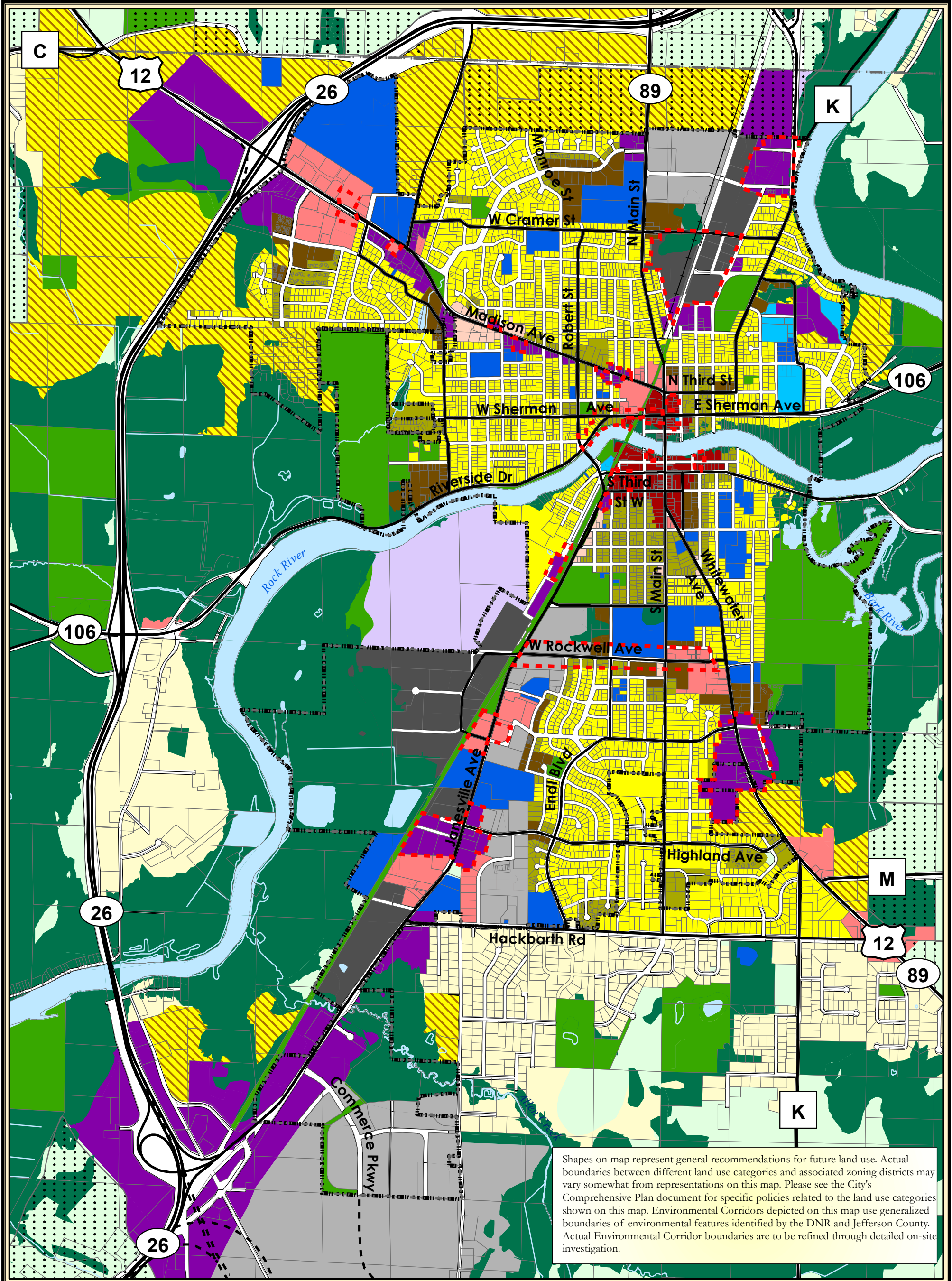
Opportunities

- Urban living experience
- Single family neighborhood character
- Historic preservation balanced with modernization
- Bed & Breakfast Opportunities
- Schools, parks & downtown as gathering places
- Parks & streets maintenance & improvements
- Neighborhood retail revitalization, along Janesville, Madison & Whitewater Avenues

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 Amended: 6/6/23
Shaping places, shaping change

WB-3 VACANT LAND LISTING CONTRACT - EXCLUSIVE RIGHT TO SELL

1 **SELLER GIVES THE FIRM THE EXCLUSIVE RIGHT TO SELL THE PROPERTY ON THE FOLLOWING TERMS:**

2 ■ **PROPERTY DESCRIPTION:** Street address is: Multiple Addresses
3 in Section _____ in the City of Fort Atkinson, County of Jefferson
4 Wisconsin. Insert additional description, if any, at lines 325-352 or attach as an addendum per lines 353-354.

5 ■ **INCLUDED IN LIST PRICE:** Seller is including in the list price the Property, Fixtures not excluded on lines 9-10, and
6 the following items: _____
7 _____
8 _____

9 ■ **NOT INCLUDED IN LIST PRICE:** Sellers personal property
10 _____

11 **CAUTION: Identify Fixtures to be excluded by Seller or which are rented and will continue to be owned by the**
12 **lessor. (See lines 251-256).**

13 ■ **LIST PRICE:** Forty Thousand and 00/100 Dollars (\$ 40,000.00).

14 ■ **GOVERNMENTAL AND CONSERVATION PROGRAMS:** Seller represents that all or some of the Property is enrolled
15 in the following governmental conservation, farmland, environmental, land use or use restricting programs, agreements
16 or conservation easements, (county, state or federal): _____

17 Lots are restricted by the City of Fort Atkinson Zoning Code under TF-10

18 ■ **USE VALUE ASSESSMENT:** Seller represents that (all or some of the Property) (none of the Property) STRIKE ONE
19 has been assessed as agricultural property under use value law.

20 ■ **SPECIAL ASSESSMENTS:** Seller represents that the Property is subject to the following special assessments:
21 _____

22 ■ **SPECIAL ZONING, LAND USE OR DEVELOPMENT RESTRICTIONS:** Seller represents that the Property is subject
23 to the following special zoning, land use, development restrictions or other conditions affecting the Property:
24 Zoning is TF-10 under the City of Fort Atkinson Zoning Code

25 ■ **RIGHT OF FIRST REFUSAL:** There (is) (is not) STRIKE ONE a right of first refusal on part or all of the Property.

26 ■ **ZONING:** Seller represents that the property is zoned: TF-10

27 ■ **UTILITY CONNECTIONS:** Seller represents that the locations of the following utility connections are as follows: (e.g.
28 at the lot line, on the property, across the street, unknown, unavailable, etc.): electricity at lot line

29 at lot line; gas at lot line; municipal sewer at lot line;

30 municipal water at lot line; telephone _____;

31 cable _____; other _____

32 **MARKETING** Seller authorizes and the Firm and its agents agree to use reasonable efforts to market the Property.

33 Seller agrees that the Firm and its agents may market Seller's personal property identified on lines 6-8 during the term
34 of this Listing. The marketing may include: MLS, Social Media, Physical Signage, Any 3rd party websites pulled from the

35 MLS

36 The Firm and its agents may advertise the following concessions, incentives, or special financing special financing and
37 incentives offered by Seller: _____
38 _____

39 which are in addition to and separate from Compensation to Others. See lines 54-59.

40 **NOTE: Concessions offered in the multiple listing service cannot be limited to or conditioned on the retention**
41 **of or payment to a cooperating firm, buyer's firm or other buyer's representative.**

42 Seller has a duty to cooperate with the marketing efforts of the Firm and its agents. See lines 185-191 regarding the Firm's
43 role as marketing agent and Seller's duty to notify the Firm of any potential buyer known to Seller. Seller agrees that the

44 Firm and its agents may market other properties during the term of this Listing.

45 **CAUTION: Limiting the Firm's cooperation with other firms may reduce the marketability of the Property.**

46 **EXCLUSIONS** All persons who may acquire an interest in the Property who are Protected Buyers under a prior listing
47 contract are excluded from this Listing to the extent of the prior firm's legal rights, unless otherwise agreed to in writing. Within

48 seven days of the date of this Listing, Seller agrees to deliver to the Firm a written list of all such Protected Buyers.

49 **NOTE: If Seller fails to timely deliver this list to the Firm, Seller may be liable to the Firm for damages and costs.** The
50 following other buyers _____

51 _____ are excluded from this Listing until
52 [INSERT DATE]. These other buyers are no longer excluded from this Listing after the specified date unless, on or before the
53 specified date, Seller has either accepted a written offer from the buyer or sold the Property to the buyer.

54 **COMPENSATION TO OTHERS** The Firm has disclosed and Seller approves offers of compensation to cooperating firms
55 working with buyers such as subagents and buyer's firms: 2.4%

56 _____

57 (Exceptions if any): _____

58 **There is no standard market commission rate. Commissions and types of service may vary by firm.**

59 **Commissions are not set by law and are fully negotiable.**

60 **COMMISSION** Seller and the Firm agree the Firm's commission shall be 3.5% if the listing firm is able to procure the

61 buyer, 2.4% if there is a buyers agent involved

62 ■ **EARNED:** Seller shall pay the Firm's commission, which shall be earned, if, during the term of this Listing:

63 1) Seller sells or accepts an offer which creates an enforceable contract for the sale of all or any part of the Property;

64 2) Seller grants an option to purchase all or any part of the Property which is subsequently exercised;

65 3) Seller exchanges or enters into a binding exchange agreement on all or any part of the Property;

66 4) A transaction occurs which causes an effective change in ownership or control of all or any part of the Property; or

67 5) A ready, willing and able buyer submits a bona fide written offer to Seller or the Firm for the Property at or above the
68 list price and on substantially the same terms set forth in this Listing and the current WB-13 Vacant Land Offer to
69 Purchase, even if Seller does not accept the buyer's offer. A buyer is ready, willing and able when the buyer submitting
70 the written offer has the ability to complete the buyer's obligations under the written offer.

71 The Firm's commission shall be earned if, during the term of the Listing, one owner of the Property sells, conveys,
72 exchanges or options, as described above, an interest in all or any part of the Property to another owner, except by
73 divorce judgment.

74 ■ **DUE AND PAYABLE:** Once earned, the Firm's commission is due and payable in full at the earlier of closing or the date set
75 for closing, even if the transaction does not close, unless otherwise agreed in writing.

76 ■ **CALCULATION:** A percentage commission shall be calculated based on the following, if earned above:

77 • Under 1) or 2) the total consideration between the parties in the transaction.

78 • Under 3) or 4) the list price if the entire Property is involved.

79 • Under 3) if the exchange involves less than the entire Property or under 4) if the effective change in ownership or
80 control involves less than the entire Property, the fair market value of the portion of the Property exchanged or for
81 which there was an effective change in ownership or control.

82 • Under 5) the total offered purchase price.

83 **NOTE: If a commission is earned for a portion of the Property it does not terminate the Listing as to any remaining**
84 **Property.**

85 **BUYER FINANCIAL CAPABILITY** The Firm and its agents are not responsible under Wisconsin statutes or regulations to
86 qualify a buyer's financial capability. If Seller wishes to confirm a buyer's financial capability, Seller may negotiate inclusion of
87 a contingency for financing, proof of funds, qualification from a lender, sale of buyer's property, or other confirmation in any offer
88 to purchase or contract.

89 **LIEN NOTICE** The Firm has the authority under section 779.32 of the Wisconsin Statutes to file a lien for commissions
90 or compensation earned but not paid when due against the commercial real estate, or the interest in the commercial real
91 estate, if any, that is the subject of this Listing. "Commercial real estate" includes all real estate except (a) real property
92 containing 8 or fewer dwelling units, (b) real property that is zoned for residential purposes and that does not contain any
93 buildings or structures, and (c) real property that is zoned for agricultural purposes.

94 **DISCLOSURE TO CLIENTS**

95 Under Wisconsin law, a brokerage firm (hereinafter firm) and its brokers and salespersons (hereinafter agents) owe certain
96 duties to all parties to a transaction:

97 (a) The duty to provide brokerage services to you fairly and honestly.

98 (b) The duty to exercise reasonable skill and care in providing brokerage services to you.

99 (c) The duty to provide you with accurate information about market conditions within a reasonable time if you request it,
100 unless disclosure of the information is prohibited by law.

101 (d) The duty to disclose to you in writing certain Material Adverse Facts about a property, unless disclosure of the
102 information is prohibited by law. (See lines 257-260.)

103 (e) The duty to protect your confidentiality. Unless the law requires it, the firm and its agents will not disclose your
104 confidential information or the confidential information of other parties. (See lines 160-176.)

105 (f) The duty to safeguard trust funds and other property the firm or its agents holds.

106 (g) The duty, when negotiating, to present contract proposals in an objective and unbiased manner and disclose the
107 advantages and disadvantages of the proposals.

108 **BECAUSE YOU HAVE ENTERED INTO AN AGENCY AGREEMENT WITH A FIRM, YOU ARE THE FIRM'S CLIENT.**
109 **A FIRM OWES ADDITIONAL DUTIES TO YOU AS A CLIENT OF THE FIRM:**

110 (a) The firm or one of its agents will provide, at your request, information and advice on real estate matters that affect
111 your transaction, unless you release the firm from this duty.

112 (b) The firm or one of its agents must provide you with all material facts affecting the transaction, not just Adverse Facts.

113 (c) The firm and its agents will fulfill the firm's obligations under the agency agreement and fulfill your lawful requests that
114 are within the scope of the agency agreement.

- 115 (d) The firm and its agents will negotiate for you, unless you release them from this duty.
- 116 (e) The firm and its agents will not place their interests ahead of your interests. The firm and its agents will not, unless required
- 117 by law, give information or advice to other parties who are not the firm's clients, if giving the information or advice is
- 118 contrary to your interests.
- 119 If you become involved in a transaction in which another party is also the firm's client (a "multiple representation
- 120 relationship"), different duties may apply.

MULTIPLE REPRESENTATION RELATIONSHIPS AND DESIGNATED AGENCY

- 121
- 122 ■ A multiple representation relationship exists if a firm has an agency agreement with more than one client who is a party
- 123 in the same transaction. If you and the firm's other clients in the transaction consent, the firm may provide services through
- 124 designated agency, which is one type of multiple representation relationship.
- 125 ■ Designated agency means that different agents with the firm will negotiate on behalf of you and the other client or clients
- 126 in the transaction, and the firm's duties to you as a client will remain the same. Each agent will provide information,
- 127 opinions, and advice to the client for whom the agent is negotiating, to assist the client in the negotiations. Each client will
- 128 be able to receive information, opinions, and advice that will assist the client, even if the information, opinions, or advice
- 129 gives the client advantages in the negotiations over the firm's other clients. An agent will not reveal any of your confidential
- 130 information to another party unless required to do so by law.
- 131 ■ If a designated agency relationship is not authorized by you or other clients in the transaction you may still authorize or
- 132 reject a different type of multiple representation relationship in which the firm may provide brokerage services to more
- 133 than one client in a transaction but neither the firm nor any of its agents may assist any client with information, opinions,
- 134 and advice which may favor the interests of one client over any other client. Under this neutral approach, the same agent
- 135 may represent more than one client in a transaction.
- 136 ■ If you do not consent to a multiple representation relationship the firm will not be allowed to provide brokerage services
- 137 to more than one client in the transaction.

CHECK ONLY ONE OF THE THREE BELOW:

- 138
- 139 ☒ The same firm may represent me and the other party as long as the same agent is not representing us both.
- 140 (multiple representation relationship with designated agency)
- 141 ☐ The same firm may represent me and the other party, but the firm must remain neutral regardless if one or
- 142 more different agents are involved. (multiple representation relationship without designated agency)
- 143 ☐ The same firm cannot represent both me and the other party in the same transaction. (I reject multiple
- 144 representation relationships)

145 **NOTE: All clients who are parties to this agency agreement consent to the selection checked above. You may**

146 **modify this selection by written notice to the firm at any time. Your firm is required to disclose to you in your**

147 **agency agreement the commission or fees that you may owe to your firm. If you have any questions about the**

148 **commission or fees that you may owe based upon the type of agency relationship you select with your firm, you**

149 **should ask your firm before signing the agency agreement.**

SUBAGENCY

150

151 Your firm may, with your authorization in the agency agreement, engage other firms (subagent firms) to assist your firm by

152 providing brokerage services for your benefit. A subagent firm and the agents associated with the subagent firm will not put

153 their own interests ahead of your interests. A subagent firm will not, unless required by law, provide advice or opinions to other

154 parties if doing so is contrary to your interests.

155 **PLEASE REVIEW THIS INFORMATION CAREFULLY. An agent can answer your questions about brokerage services,**

156 **but if you need legal advice, tax advice, or a professional home inspection, contact an attorney, tax advisor, or home**

157 **inspector.**

158 This disclosure is required by section 452.135 of the Wisconsin statutes and is for information only. It is a plain language

159 summary of the duties owed to you under section 452.133 (2) of the Wisconsin statutes.

160 ■ **CONFIDENTIALITY NOTICE TO CLIENTS:** The Firm and its agents will keep confidential any information given to the

161 Firm or its agents in confidence, or any information obtained by the Firm and its agents that a reasonable person would

162 want to be kept confidential, unless the information must be disclosed by law or you authorize the Firm to disclose

163 particular information. The Firm and its agents shall continue to keep the information confidential after the Firm is no

164 longer providing brokerage services to you.

165 The following information is required to be disclosed by law:

- 166 1) Material Adverse Facts, as defined in section 452.01 (5g) of the Wisconsin statutes (see lines 257-260).
- 167 2) Any facts known by the Firm and its agents that contradict any information included in a written inspection report on
- 168 the property or real estate that is the subject of the transaction.
- 169 To ensure that the Firm and its agents are aware of what specific information you consider confidential, you may list that
- 170 information below (see lines 172-174). At a later time, you may also provide the Firm with other information you consider

171 to be confidential.

172 **CONFIDENTIAL INFORMATION:** _____

173 _____

174 _____

175 **NON-CONFIDENTIAL INFORMATION** (The following may be disclosed by the Firm and its agents): _____

176 **The lots are currently owned by the City of Fort Atkinson**

177 **COOPERATION, ACCESS TO PROPERTY OR OFFER PRESENTATION** The parties agree that the Firm and its
178 agents will work and cooperate with other firms and agents in marketing the Property, including firms acting as subagents
179 (other firms engaged by the Firm - see lines 150-154) and firms representing buyers. Cooperation includes providing
180 access to the Property for showing purposes and presenting offers and other proposals from these firms to Seller. Note
181 any firms with whom the Firm shall not cooperate, any firms or agents or buyers who shall not be allowed to attend
182 showings, and the specific terms of offers which should not be submitted to Seller: _____

183 _____

184 _____

185 **SELLER COOPERATION WITH MARKETING EFFORTS** Seller agrees to cooperate with the Firm in the Firm's
186 marketing efforts and to provide the Firm with all records, documents and other material in Seller's possession or control
187 which are required in connection with the sale. Seller authorizes the Firm to do those acts reasonably necessary to effect
188 a sale and Seller agrees to cooperate fully with these efforts which may include use of a multiple listing service, Internet
189 advertising or a lockbox system at the Property. Seller shall promptly refer all persons making inquiries concerning the
190 Property to the Firm and notify the Firm in writing of any potential buyers with whom Seller negotiates or who view the
191 Property with Seller during the term of this Listing.

192 **LEASED PROPERTY** If Property is currently leased and lease(s) will extend beyond closing, Seller shall assign Seller's
193 rights under the lease(s) and transfer all security deposits and prepaid rents (subject to agreed upon prorations) thereunder
194 to buyer at closing. Seller acknowledges that Seller remains liable under the lease(s) unless released by tenant(s). **CAUTION:**
195 **Seller should consider obtaining an indemnification agreement from buyer for liabilities under the lease(s) unless**
196 **released by tenants.**

197 **DISPUTE RESOLUTION** The Parties understand that if there is a dispute about this Listing or an alleged breach, and
198 the Parties cannot resolve the dispute by mutual agreement, the Parties may consider alternative dispute resolution
199 instead of judicial resolution in court. Alternative dispute resolution may include mediation and binding arbitration. Should
200 the Parties desire to submit any potential dispute to alternative dispute resolution, it is recommended that the Parties
201 add such in Additional Provisions or in an Addendum.

202 **NOTE: Wis. Stat. § 452.142 places a time limit on the commencement of legal actions arising out of this Listing.**

203 **EXTENSION OF LISTING** The Listing term is extended for a period of one year as to any Protected Buyer. Upon
204 receipt of a written request from Seller or a firm that has listed the Property, the Firm agrees to promptly deliver to Seller
205 a written list of those buyers known by the Firm and its agents to whom the extension period applies. Should this Listing
206 be terminated by Seller prior to the expiration of the term stated in this Listing, this Listing shall be extended for
207 Protected Buyers, on the same terms, for one year after the Listing is terminated (lines 208-216).

208 **TERMINATION OF LISTING** Neither Seller nor the Firm has the legal right to unilaterally terminate this Listing absent a
209 material breach of contract by the other party. Seller understands that the parties to the Listing are Seller and the Firm. Agents
210 for the Firm do not have the authority to enter into a mutual agreement to terminate the Listing, amend the commission amount
211 or shorten the term of this Listing, without the written consent of the agent(s)' supervising broker. Seller and the Firm agree
212 that any termination of this Listing by either party before the date stated on line 356 shall be effective by the Seller only if
213 stated in writing and delivered to the Firm in accordance with lines 302-324 and effective by the Firm only if stated in
214 writing by the supervising broker and delivered to Seller in accordance with lines 302-324.

215 **CAUTION: Early termination of this Listing may be a breach of contract, causing the terminating party to**
216 **potentially be liable for damages.**

217 **VACANT LAND DISCLOSURE REPORT** Seller agrees to complete the vacant land disclosure report provided by the
218 Firm to the best of Seller's knowledge. Seller agrees to amend the report should Seller learn of any Defect(s) after
219 completion of the report but before acceptance of a buyer's offer to purchase. Seller authorizes the Firm and its agents to
220 distribute the report to all interested parties and agents inquiring about the Property and Seller acknowledges that the
221 Firm and its agents have a duty to disclose all Material Adverse Facts as required by law.

222 **SELLER REPRESENTATIONS REGARDING DEFECTS** Seller represents to the Firm that as of the date of this Listing,
223 Seller has no notice or knowledge of any Defects affecting the Property other than those noted on the vacant land disclosure
224 report.

225 **WARNING: IF SELLER REPRESENTATIONS ARE INCORRECT OR INCOMPLETE, SELLER MAY BE LIABLE FOR**
226 **DAMAGES AND COSTS.**

OPEN HOUSE AND SHOWING RESPONSIBILITIES

Seller is aware that there is a potential risk of injury, damage and/or theft involving persons attending an "individual showing" or an "open house." Seller accepts responsibility for preparing the Property to minimize the likelihood of injury, damage and/or loss of personal property. Seller agrees to hold the Firm and its agents harmless for any losses or liability resulting from personal injury, property damage, or theft occurring during "individual showings" or "open houses" other than those caused by the negligence or intentional wrongdoing of the Firm and its agents. Seller acknowledges that individual showings and open houses may be conducted by licensees other than agents of the Firm, that appraisers and inspectors may conduct appraisals and inspections without being accompanied by agents of the Firm or other licensees, and that buyers or licensees may be present at all inspections and testing and may photograph or videotape Property unless otherwise provided for in additional provisions at lines 325-352 or in an addendum per lines 353-354.

DEFINITIONS

■ **ADVERSE FACT:** An "Adverse Fact" means any of the following:

a) A condition or occurrence that is generally recognized by a competent licensee as doing any of the following:

- 1) Significantly and adversely affecting the value of the Property;
- 2) Significantly reducing the structural integrity of improvements to real estate; or
- 3) Presenting a significant health risk to occupants of the Property.

b) Information that indicates that a party to a transaction is not able to or does not intend to meet his or her obligations under a contract or agreement made concerning the transaction.

■ **DEADLINES – DAYS:** Deadlines expressed as a number of "days" from an event are calculated by excluding the day the event occurred and by counting subsequent calendar days.

■ **DEFECT:** "Defect" means a condition that would have a significant adverse effect on the value of the Property; that would significantly impair the health or safety of future occupants of the Property; or that if not repaired, removed or replaced would significantly shorten or adversely affect the expected normal life of the premises.

■ **FIRM:** "Firm" means a licensed sole proprietor broker or a licensed broker business entity.

■ **FIXTURES:** A "Fixture" is an item of property which is physically attached to or so closely associated with land so as to be treated as part of the real estate, including, without limitation, physically attached items not easily removable without damage to the premises, items specifically adapted to the premises, and items customarily treated as fixtures, including, but not limited to, all: perennial crops; garden bulbs; plants; shrubs and trees; and fences; storage buildings on permanent foundations and docks/piers on permanent foundations.

CAUTION: Annual crops are not part of the purchase price unless otherwise agreed.

■ **MATERIAL ADVERSE FACT:** A "Material Adverse Fact" means an Adverse Fact that a party indicates is of such significance, or that is generally recognized by a competent licensee as being of such significance to a reasonable party, that it affects or would affect the party's decision to enter into a contract or agreement concerning a transaction or affects or would affect the party's decision about the terms of such a contract or agreement.

■ **PERSON ACTING ON BEHALF OF BUYER:** "Person Acting on Behalf of Buyer" shall mean any person joined in interest with buyer, or otherwise acting on behalf of buyer, including but not limited to buyer's immediate family, agents, employees, directors, managers, members, officers, owners, partners, incorporators and organizers, as well as any and all corporations, partnerships, limited liability companies, trusts or other entities created or controlled by, affiliated with or owned by buyer, in whole or in part whether created before or after expiration of this Listing.

■ **PROPERTY:** Unless otherwise stated, "Property" means all property included in the list price as described on lines 2-4.

■ **PROTECTED BUYER:** Means a buyer who personally, or through any Person Acting on Behalf of Buyer, during the term of this Listing:

- 1) Delivers to Seller or the Firm or its agents a written offer to purchase, exchange or option on the Property during the term of this Listing;
- 2) Views the Property with Seller or negotiates directly with Seller by communicating with Seller regarding any potential terms upon which the buyer might acquire an interest in the Property; or
- 3) Attends an individual showing of the Property or communicates with agents of the Firm or cooperating firms regarding any potential terms upon which the buyer might acquire an interest in the Property, but only if the Firm or its agents deliver the buyer's name to Seller, in writing, no later than three days after the earlier of expiration or termination (lines 208-216) of the Listing. The requirement in 3), to deliver the buyer's name to Seller in writing, may be fulfilled as follows:
 - a) If the Listing is effective only as to certain individuals who are identified in the Listing, by the identification of the individuals in the Listing; or,
 - b) If a buyer has requested that the buyer's identity remain confidential, by delivery of a written notice identifying the firm or agents with whom the buyer negotiated and the date(s) of any individual showings or other negotiations.

A Protected Buyer also includes any Person Acting on Behalf of Buyer joined in interest with or otherwise acting on behalf of a Protected Buyer, who acquires an interest in the Property during the extension of listing period as noted on lines 203-207.

NON-DISCRIMINATION

Seller and the Firm and its agents agree that they will not discriminate against any prospective buyer on account of race, color, sex, sexual orientation as defined in Wisconsin Statutes, Section 111.32(13m), disability, religion, national origin, marital status, lawful source of income, age, ancestry, family

287 **status, status as a victim of domestic abuse, sexual assault, or stalking, or in any other unlawful manner.**

288 **EARNEST MONEY** If the Firm holds trust funds in connection with the transaction, they shall be retained by the Firm in the
289 Firm's trust account. The Firm may refuse to hold earnest money or other trust funds. Should the Firm hold the earnest money,
290 the Firm shall hold and disburse the earnest money funds in accordance with Wis. Stat. Ch. 452 and Wis. Admin. Code Ch.
291 REEB 18. If the transaction fails to close and the Seller requests and receives the earnest money as the total liquidated damages,
292 then upon disbursement to Seller, the earnest money shall be paid first to reimburse the Firm for cash advances made by the
293 Firm on behalf of Seller and one half of the balance, but not in excess of the agreed commission, shall be paid to the Firm as full
294 commission in connection with said purchase transaction and the balance shall belong to Seller. This payment to the Firm shall
295 not terminate this Listing.

296 **OCCUPANCY** Unless otherwise provided, Seller agrees to give buyer occupancy of the Property at time of closing.
297 Unless otherwise agreed, Seller agrees to have the Property free of all debris and personal property except for personal
298 property belonging to current tenants, sold to the buyer or left with the buyer's consent.

299 **NOTICE ABOUT SEX OFFENDER REGISTRY** You may obtain information about the sex offender registry and persons
300 registered with the registry by contacting the Wisconsin Department of Corrections on the Internet at
301 <http://www.doc.wi.gov> or by telephone at (608)240-5830.

302 **DELIVERY OF DOCUMENTS AND WRITTEN NOTICES** Unless otherwise stated in this Listing, delivery of documents
303 and written notices to a party shall be effective only when accomplished by one of the methods specified at lines 305-
304 324.

305 (1) Personal Delivery: giving the document or written notice personally to the party, or the party's recipient for delivery if
306 named at line 307 or 308.

307 Seller's recipient for delivery (optional): Rebecca Houseman

308 Firm's recipient for delivery (optional): Brandon Housley

309 ☐ (2) Fax: fax transmission of the document or written notice to the following telephone number:

310 Seller: _____ Firm: _____

311 ☐ (3) Commercial Delivery: depositing the document or written notice fees prepaid or charged to an account with a
312 commercial delivery service, addressed either to the party, or to the party's recipient for delivery if named at line 307 or
313 308, for delivery to the party's delivery address at line 317 or 318.

314 ☐ (4) U.S. Mail: depositing the document or written notice postage prepaid in the U.S. Mail, addressed either to the
315 party, or to the party's recipient for delivery if named at line 307 or 308 for delivery to the party's delivery address at line
316 317 or 318.

317 Delivery address for Seller: _____

318 Delivery address for Firm: _____

319 ☒ (5) Email: electronically transmitting the document or written notice to the party's email address, if given below at
320 line 323 or 324. If this is a consumer transaction where the property being purchased or the sale proceeds are used
321 primarily for personal, family or household purposes, each consumer providing an email address below has first consented
322 electronically as required by federal law.

323 Email address for Seller: RHouseman@fortatkinsonwi.gov

324 Email address for Firm: bhousley@artisangraham.com

325 **ADDITIONAL PROVISIONS**

326 _____
327 Parcel numbers to be included in this listing are as follows:

328 Lot 1: 226-0514-0441-139 - 608 Maple Street, Fort Atkinson WI

329 Lot 2: 226-0514-0441-140 - 612 Maple Street, Fort Atkinson WI

330 Lot 3: 226-0514-0441-141 - 616 Maple Street, Fort Atkinson, WI

331 Lot 4: 226-0514-0441-142 - 622 Maple Street, Fort Atkinson, WI

332 Lot 7: 226-0514-0441-144 - 613 Grove Street, Fort Atkinson, WI

333 Lot 8: 226-0514-0441-091 - 609 Grove Street, Fort Atkinson, WI

334 _____
335 Deed restrictions are in place regarding; Architectural style, Construction Commencement timelines, Construction,
336 Completion timeline, City's right to repurchase, and possible timeline extensions. All deed restrictions to be made public
337 and available to all potential buyers.
338 _____
339 _____
340 _____
341 _____
342 _____
343 _____
344 _____

345 _____
 346 _____
 347 _____
 348 _____
 349 _____
 350 _____
 351 _____
 352 _____

353 **ADDENDA** The attached addenda _____ **Vacant Land Disclosure Report** _____
 354 _____ is/are made part of this Listing.

355 **TERM OF THE CONTRACT** From the _____ day of _____, _____, up
 356 to the earlier of midnight of the _____ day of _____, _____, or the conveyance
 357 of the entire Property.

WIRE FRAUD WARNING! Wire Fraud is a real and serious risk. Never trust wiring instructions sent via email. Funds wired to a fraudulent account are often impossible to recover.

Criminals are hacking emails and sending fake wiring instructions by impersonating a real estate agent, Firm, lender, title company, attorney or other source connected to your transaction. These communications are convincing and professional in appearance but are created to steal your money. The fake wiring instructions may even be mistakenly forwarded to you by a legitimate source.

DO NOT initiate ANY wire transfer until you confirm wiring instructions IN PERSON or by YOU calling a verified number of the entity involved in the transfer of funds. Never use contact information provided by any suspicious communication.

Real estate agents and Firms ARE NOT responsible for the transmission, forwarding, or verification of any wiring or money transfer instructions.

370 **BY SIGNING BELOW, SELLER ACKNOWLEDGES RECEIPT OF A COPY OF THIS LISTING CONTRACT AND THAT**
 371 **HE/SHE HAS READ ALL 7 PAGES AS WELL AS ANY ADDENDA AND ANY OTHER DOCUMENTS INCORPORATED**
 372 **INTO THE LISTING.**

373 (x) _____
 374 Seller's Signature ▲ Print Name ► _____ Date ▲ _____

375 (x) _____
 376 Seller's Signature ▲ Print Name ► _____ Date ▲ _____

377 (x) _____
 378 Seller's Signature ▲ Print Name ► _____ Date ▲ _____

379 (x) _____
 380 Seller's Signature ▲ Print Name ► _____ Date ▲ _____

381 _____
 382 Seller Entity Name (if any) Print Name ▲ _____

383 (x) _____
 384 Authorized Signature ▲ _____ Date ▲ _____
 385 Print Name & Title ► _____

386 _____ **Artisan Graham Real Estate** _____
 387 Firm Name ▲ _____

388 (x) _____
 389 Agent's Signature ▲ Print Name ► _____ **Brandon Housley** _____ Date ▲ _____

V.C Page 87

Location Map, SE 1/4,
Section 4, Town 5 North,
Range 14 East

Map Not to Scale

Owners Certificate

The City of Fort Atkinson, a Wisconsin Municipal Corporation, LLC. As owner hereby certifies that it has caused the land described hereon to be surveyed, divided, mapped and dedicated as represented on this plat. It also certifies that this plat is required by S. 236.10 and S. 236.12 to be submitted to the following agencies for approval or objection:

Department of Administration
Jefferson County Planning & Zoning Department
City of Fort Atkinson

In witness hereof, The City of Fort Atkinson has caused these presents to be executed this 18th day of March, 2025.

The City of Fort Atkinson By:

Rebecca Housemar, City Manager, City of Fort Atkinson

STATE OF WISCONSIN
COUNTY OF JEFFERSON

Personally came before me this 18th day of March, 2025, the above named representative to me known to be the person who executed the foregoing instrument and acknowledged the same.



Notary Public, Jefferson County, Wisconsin
my commission expires 01/01/2029

Owners Certificate

The School District of Fort Atkinson. As owner hereby certifies that it has caused the land described hereon to be surveyed, divided, mapped and dedicated as represented on this plat. It also certifies that this plat is required by S. 236.10 and S. 236.12 to be submitted to the following agencies for approval or objection:

Department of Administration
Jefferson County Planning & Zoning Department
City of Fort Atkinson

In witness hereof, The School District of Fort Atkinson has caused these presents to be executed this 26th day of March, 2025.

The School District of Fort Atkinson By:

Administrator, The School District of Fort Atkinson

STATE OF WISCONSIN
COUNTY OF JEFFERSON

Personally came before me this 20 day of March, 2025, the above named representative to me known to be the person who executed the foregoing instrument and acknowledged the same.

Notary Public, Jefferson County, Wisconsin
my commission expires 01/01/2029

1493162

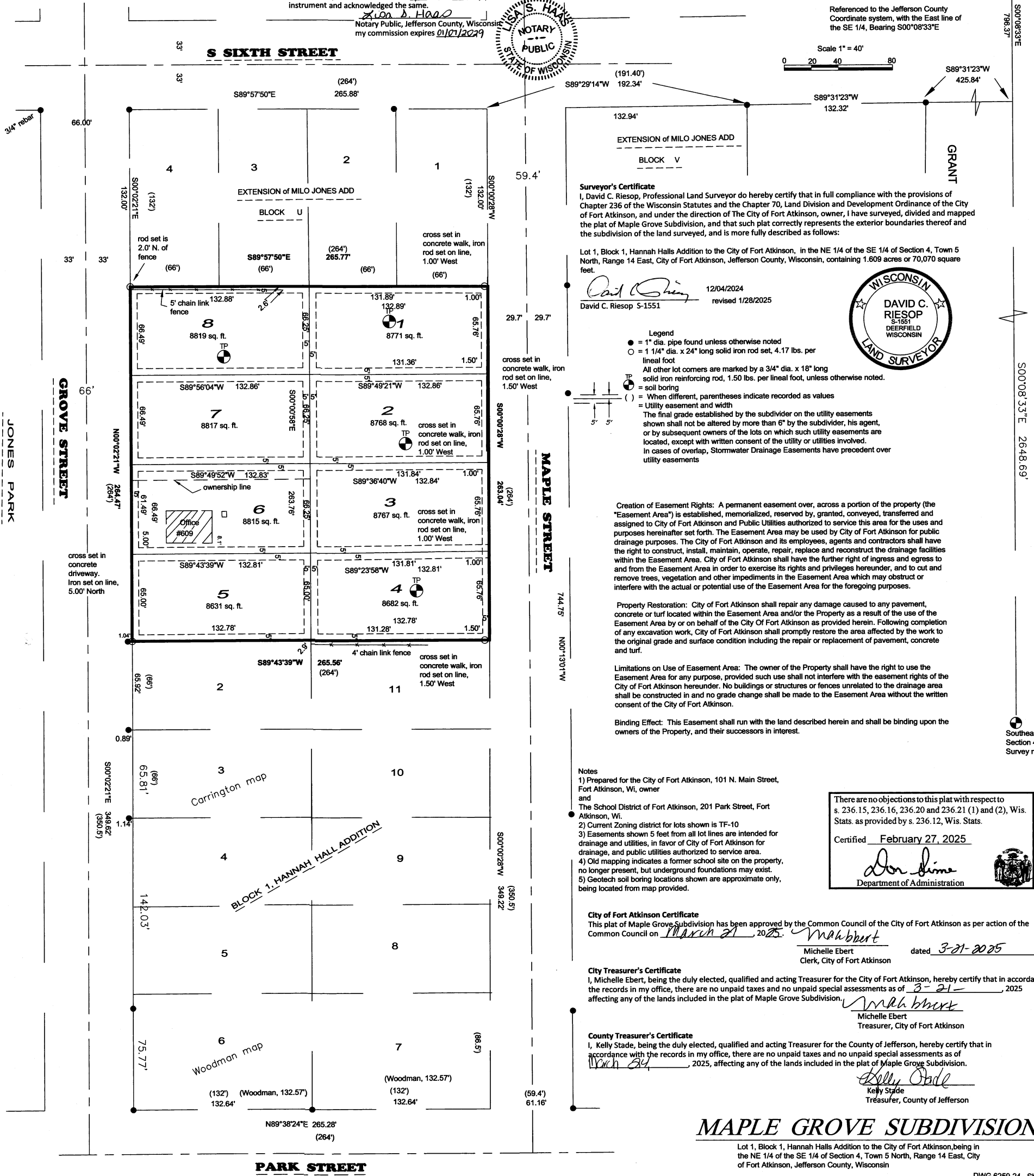
MAP #:
VOLUME: C PAGE: 87
Office of Register of Deeds
Jefferson County, WI
RECEIVED FOR RECORD
03/24/2025 08:48:59 AM
Staci M. Hoffman
Total Pages: 1
REC FEE: 50.00

East 1/4 corner,
Section 4-5-14,
PK nail matching
published coordinates
found



Referenced to the Jefferson County
Coordinate system, with the East line of
the SE 1/4, Bearing S00°08'33"E

Scale 1" = 40'



Surveyor's Certificate

I, David C. Riesop, Professional Land Surveyor do hereby certify that in full compliance with the provisions of Chapter 236 of the Wisconsin Statutes and the Chapter 70, Land Division and Development Ordinance of the City of Fort Atkinson, and under the direction of The City of Fort Atkinson, owner, I have surveyed, divided and mapped the plat of Maple Grove Subdivision, and that such plat correctly represents the exterior boundaries thereof and the subdivision of the land surveyed, and is more fully described as follows:

Lot 1, Block 1, Hannah Halls Addition to the City of Fort Atkinson, in the NE 1/4 of the SE 1/4 of Section 4, Town 5 North, Range 14 East, City of Fort Atkinson, Jefferson County, Wisconsin, containing 1.609 acres or 70,070 square feet.

David C. Riesop
David C. Riesop S-1551
12/04/2024
revised 1/28/2025



Legend
● = 1" dia. pipe found unless otherwise noted
○ = 1 1/4" dia. x 24" long solid iron rod set, 4.17 lbs. per lineal foot
All other lot corners are marked by a 3/4" dia. x 18" long solid iron reinforcing rod, 1.50 lbs. per lineal foot, unless otherwise noted.
TP = soil boring
() = When different, parentheses indicate recorded as values
= Utility easement and width
The final grade established by the subdivider on the utility easements shown shall not be altered by more than 6" by the subdivider, his agent, or by subsequent owners of the lots on which such utility easements are located, except with written consent of the utility or utilities involved. In cases of overlap, Stormwater Drainage Easements have precedent over utility easements

Creation of Easement Rights: A permanent easement over, across a portion of the property (the "Easement Area") is established, memorialized, reserved by, granted, conveyed, transferred and assigned to City of Fort Atkinson and Public Utilities authorized to service this area for the uses and purposes hereinafter set forth. The Easement Area may be used by City of Fort Atkinson for public drainage purposes. The City of Fort Atkinson and its employees, agents and contractors shall have the right to construct, install, maintain, operate, repair, replace and reconstruct the drainage facilities within the Easement Area. City of Fort Atkinson shall have the further right of ingress and egress to and from the Easement Area in order to exercise its rights and privileges hereunder, and to cut and remove trees, vegetation and other impediments in the Easement Area which may obstruct or interfere with the actual or potential use of the Easement Area for the foregoing purposes.

Property Restoration: City of Fort Atkinson shall repair any damage caused to any pavement, concrete or turf located within the Easement Area and/or the Property as a result of the use of the Easement Area by or on behalf of the City of Fort Atkinson as provided herein. Following completion of any excavation work, City of Fort Atkinson shall promptly restore the area affected by the work to the original grade and surface condition including the repair or replacement of pavement, concrete and turf.

Limitations on Use of Easement Area: The owner of the Property shall have the right to use the Easement Area for any purpose, provided such use shall not interfere with the easement rights of the City of Fort Atkinson hereunder. No buildings or structures or fences unrelated to the drainage area shall be constructed in and no grade change shall be made to the Easement Area without the written consent of the City of Fort Atkinson.

Binding Effect: This Easement shall run with the land described herein and shall be binding upon the owners of the Property, and their successors in interest.

Notes

- 1) Prepared for the City of Fort Atkinson, 101 N. Main Street, Fort Atkinson, WI, owner and The School District of Fort Atkinson, 201 Park Street, Fort Atkinson, WI.
- 2) Current Zoning district for lots shown is TF-10
- 3) Easements shown 5 feet from all lot lines are intended for drainage and utilities, in favor of City of Fort Atkinson for drainage, and public utilities authorized to service area.
- 4) Old mapping indicates a former school site on the property, no longer present, but underground foundations may exist.
- 5) Geotech soil boring locations shown are approximate only, being located from map provided.

City of Fort Atkinson Certificate

This plat of Maple Grove Subdivision has been approved by the Common Council of the City of Fort Atkinson as per action of the Common Council on March 21, 2025.

Michelle Ebert
Clerk, City of Fort Atkinson

dated 3-21-2025

City Treasurer's Certificate

I, Michelle Ebert, being the duly elected, qualified and acting Treasurer for the City of Fort Atkinson, hereby certify that in accordance with the records in my office, there are no unpaid taxes and no unpaid special assessments as of 3-21-2025, 2025 affecting any of the lands included in the plat of Maple Grove Subdivision.

Michelle Ebert
Treasurer, City of Fort Atkinson

County Treasurer's Certificate

I, Kelly Stade, being the duly elected, qualified and acting Treasurer for the County of Jefferson, hereby certify that in accordance with the records in my office, there are no unpaid taxes and no unpaid special assessments as of March 21, 2025, affecting any of the lands included in the plat of Maple Grove Subdivision.

Kelly Stade
Treasurer, County of Jefferson

MAPLE GROVE SUBDIVISION

Lot 1, Block 1, Hannah Halls Addition to the City of Fort Atkinson, being in the NE 1/4 of the SE 1/4 of Section 4, Town 5 North, Range 14 East, City of Fort Atkinson, Jefferson County, Wisconsin

DWG 6259-24 Sheet 1 of 1



MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to proposals for a Classification and Compensation Study for the City of Fort Atkinson (Houseman, City Manager)

BACKGROUND

At the March 18, 2025 City Council meeting, the Council authorized staff to publish a request for proposals (RFP) for a Classification and Compensation study to be completed in the summer of 2025. Attached to this memo is the information represented to the City Council on March 18th as well as the RFP for the study.

DISCUSSION

The City received 11 proposals from professional consulting firms with experience in the classification and compensation industry. A summary of the proposals is attached to this memo for review. Staff reviewed the proposals and found that all 11 met the deadline and the requirements included in the RFP. The range in cost for these proposals is between \$20,475 and \$67,650. The proposals are from companies located in Wisconsin and throughout the country. The City has consistently seen proposals from companies throughout the country for professional services such as this, due to the increased reach of the City's social media as well as use of artificial intelligence by these firms to scan the landscape for RFPs to which to respond.

The summary table includes the cost of each of the 11 proposals as well as notes to differentiate these proposals and firms from one another. All 11 proposals met the requirements of the RFP. MGT, McGrath Human Resources Group, and Public Administration Associates, LLC have significant experience in Wisconsin. MGT is the least expensive of the group, but the company is proposing a study conducted 100% virtual. The proposal does not include updated job descriptions, which is something the City will need during or after this process.

After reviewing the proposals, methodologies, and qualifications, staff recommends that MGT be awarded the contract for this study. However, staff would like to include at least one in-person meeting as well as updated job descriptions with this study. Those additional services will increase the cost of the initial \$20,475 proposal. In consultation with the project lead at

MGT, staff estimates another \$4,000 to \$8,000 is needed for the contract for the additional services, for a total of up to \$28,475. At this cost, MGT is no longer the least expensive option. However, staff has confidence in MGT's experience in the field and in working with similarly-sized cities in Wisconsin.

FINANCIAL ANALYSIS

A classification and compensation study was included in the 2025 budget document with an estimated cost of \$30,000. The source of funds identified in the budget was American Rescue Plan Act (ARPA) funds. Those funds have been placed in an assigned fund balance account to be utilized in accordance with the approved ARPA budget and planning documents. Staff proposes to use funds from the ARPA assigned fund balance to pay for this study.

RECOMMENDATION

Staff recommends that the City Council authorize the City Manager to contract with MGT for a classification and compensation study as outlined in their proposal at a cost not to exceed \$28,475.

ATTACHMENTS

1. 3.18.25 Council Memo - Class & Comp RFP
2. Class & Comp Summary Table
3. MGT PROPOSAL City of Fort Atkinson_Class and Comp
4. AutoSolve Proposal - City of Fort Atkinson - 4-18-2025
5. 20250418 City of Fort Atkinson Class & Comp Study Proposal Logic Comp
6. City of Fort Atkinson Classification and Compensation Study_4-18-25
7. City of Fort Atkinson, WI - Comp Plan Technical Proposal
8. Fort Atkinson (WI), City of Classification and Compensation Study
9. Fort Atkinson WI due 4.18.25 ELECTRONIC
10. Fort Atkinson, WI Compensation Study_Bolton Response
11. FortAtkinsonClass-CompProposal(4162025)
12. Gallagher Submission for Classification and Compensation Study
13. Paypoint HR Response to Fort Atkinson



MEMORANDUM

DATE: March 18, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to the release of a request for proposals for a Classification and Compensation Study (Houseman, City Manager)

BACKGROUND

One of the goals outlined in the 2025 adopted budget document was to conduct a classification and compensation study for full-time, non-represented City employees. The last time a similar study was performed was in 2013 with implementation in 2014. The job market has changed dramatically since the last study, and staff is concerned that the City's pay plan is out of date, which can negatively impact employee recruitment and retention.

DISCUSSION

The City's current pay plan consists of 32 pay grades. Each grade has 3 steps: start, 18 months, and 36 months. An employee with satisfactory performance reviews moves through the three steps within the first three years of employment and then has no opportunity for a wage increase beyond the annual cost of living adjustment (COLA) included in the annual budget document. This structure limits the ability for managers to reward above-average performance with additional compensation.

Also, it has been over ten years since the pay plan has been reviewed to ensure internal equity among positions and since any market comparison has occurred. Individual positions have been reviewed and adjusted over the last several years as needed, and staff has updated job descriptions as employees have turned over before advertising the positions. However, reviewing location on the pay plan and job descriptions has not occurred for all positions.

Staff proposes to release the attached request for proposals (RFP) to consultants for proposals for a classification and compensation study if authorized by the City Council. The schedule included in the RFP indicates that proposals are due by April 18th. Staff would then review the proposals and make a recommendation to the City Council for possible action at the meeting on May 6th. A contract with the successful proposer would then be executed with the project starting in May and complete by the end of August.

If the result of the study, which is expected to take between three and four months, includes

recommendations with budgetary impacts, staff may incorporate them into the 2026 budget document.

FINANCIAL ANALYSIS

There is no cost to issuing a request for proposals. However, the study was included in the 2025 Budget document with an estimated cost of \$30,000. The source of funds identified in the budget was American Rescue Plan Act (ARPA) funds. Those funds have been de-federalized and transferred to an assigned fund balance account to be utilized in accordance with the approved ARPA budget and planning documents.

Implementation of the recommendations in the final report may have a financial impact. If that is the case, the City Council would review these recommendations later in the process and may take action on any with financial impacts. Note that a previous study recommended adjusting some pay grades down, which reduced pay for certain employees. Staff does not anticipate recommending any change that negatively impacts City staff.

RECOMMENDATION

Staff recommends that the City Council authorize the City Manager to release the RFP to known qualified firms and to post on the City's website, the League of Wisconsin Municipalities' website, and the Wisconsin City/County Managers Association website.

ATTACHMENTS

1. 3.2025 RFP-Classification and Compensation Study Fort Atkinson



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

City of Fort Atkinson Request for Proposals (RFP) Classification and Compensation Study

Issue Date: March 19, 2025

Due Date: April 18, 2025

Contact:
Rebecca Houseman, City Manager
rhouseman@fortatkinsonwi.gov
920-397-9901

I. BACKGROUND AND SUMMARY

The City of Fort Atkinson is a vibrant and growing community located along the Rock River, a few miles upstream from Lake Koshkonong, in Jefferson County. Fort Atkinson is the largest City located entirely in Jefferson County. According to 2023 estimates, the population of Fort Atkinson is 12,350.

The City has 14 departments with approximately 100 full time employees, various part time staff across departments, 20 unionized police officers and 12 unionized firefighters.

The City operates under the Council-Manager form of government. The City Manager is appointed by the City Council; oversees the day-to-day operations of the City; and serves as the City Council's chief advisor.

The City of Fort Atkinson is seeking proposals from qualified consultants for a comprehensive classification and compensation study of the City's compensation system and related components for non-represented positions.

The most recent classification and compensation study for non-represented City positions was completed in 2013. The City's current compensation system was developed based on the recommendations from the 2013 study and implemented in 2014.

The goal of this study is to ensure that the City remains competitive in attracting and retaining highly qualified individuals for the present and future years while maintaining fiscal responsibility and internal equity across positions.

II. PROJECT SCOPE

The contractor will be responsible for conducting a comprehensive analysis of the City's current classification, compensation system and related components, to include the following:

- A. Conduct project orientation sessions to explain the scope of the project, methodology, and employees' roles for City staff.
- B. Review the current job descriptions and classification and compensation system for non-represented City employees to include reviewing existing classifications (approximately 32 different classifications) and the current City pay structure to develop recommendations for an updated classification and compensation system.
- C. Conduct a market survey to compare compensation with other comparable governmental employers within the same geographical area or similar markets.
- D. Provide recommendations to adjust job classifications and wage scales based on market research while maintaining internal equity across positions.
- E. Recommend Fair Labor Standards Act (FLSA) exempt/non-exempt status

changes, if needed.

- F. Identify potential pay compression issues and provide alternative solutions.
- G. Deliver a comprehensive final report that includes updated job descriptions, findings, recommendations, and an implementation plan for proposed changes.
- H. The selected Contractor is required to attend public meetings and present findings to the Finance Committee and City Council.
- I. Provide staff training for ongoing administration of the compensation system.
- J. Ensure City staff have the ability to maintain the integrity of the classification system in future years.

Benefit administration is not included as components of the study.

The City will provide copies of all pay ranges, current job descriptions, job classifications and any other available in-house information that the successful consultant may require to complete the study.

City staff can assist with correspondence and distribution of material and other administrative support identified by the contractor.

III. PROJECT COST

All project tasks, duties, materials and documents as identified in Section II, shall be provided to the City at a not-to-exceed cost to include hourly rates and fees.

IV. PROPOSER'S CLARIFICATION

By submitting a proposal, the Proposer certifies that this request for bid has been fully read and that the Proposer understands the proposal method and has full knowledge of the scope, nature, and quality of work to be performed.

V. PROPOSAL CONTENT AND ORGANIZATION

Proposals are to be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of the RFP. Proposals shall not exceed twenty (20) pages. Elaborate proposals, (e.g. elaborate artwork, expensive bindings and promotional materials) beyond that sufficient to present a complete and effective proposal are not necessary or desired. Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to the RFP requirements and clarity of the content. Proposers shall respond to all questions as thoroughly as possible. Any omission or deviation from the stipulations and requirements identified in the RFP may be cause for the rejection of the entire proposal. The following shall be included in the proposal:

A. Contractor Statement of Qualifications/Experience

1. Responses to this proposal should include a brief introduction of the company or firm and a summary of the firm's history and experience in conducting classification and compensation studies and formulating pay plans with similar entities. Include a discussion of any methodologies used or approaches taken to compensation studies.
2. Provide a description of the firm's organization and the qualifications of staff who will perform the work, including experience in similar work, and relevant education.
3. Provide the firm's understanding of the services to be performed.

B. References

Provide a list of three similar projects with similar entities the firm has performed services for within the past 10 years including project cost, names, addresses, and phone numbers of the clients that will be used as a reference.

C. Compensation

Provide the firm's all-inclusive fee for which the requested work in the Scope of Services Section will be done. This request for information does not, under any circumstances, commit the City to pay any costs incurred by any Proposer in the submission of qualifications. The Proposer is responsible for all costs associated with the response to this request.

D. Schedule/Timeline

Compose a schedule/timetable for the entire project and for each individual process with a proposed begin date of May 7, 2025 and completion date of no later than August 29, 2025.

VI. EVALUATION OF PROPOSALS

Proposal evaluation and award of contract will be based on the information submitted in the proposal, in addition to a review of references and any required oral presentations. The selected Proposer will be identified through a qualification-based selection process. Proposals submitted in accordance with this RFP will be reviewed based on the following factors:

- A. The firm's experience with this type of project. Experience conducting market surveys, creating, modifying, and implementing compensation and pay plan designs for comparable government entities.
- B. The firm's understanding of the project, and relevant skills and professional abilities of the assigned staff.

- C. Quality of work based upon review of a minimum of three references.
- D. Schedule of completion. The project must be completed on a timely basis and within the deadlines outlined in the RFP.
- E. Cost. Although significant, cost may not be the dominant factor. The staff evaluating the RFPs, subject to approval by the City Council shall select the proposal deemed most suitable to the City's needs and enter a contract for the work. After selecting a proposal, the City will negotiate a contract. The contract shall include a set, not-to-exceed figure for total contract cost and specify the hourly rates and fees upon which billings shall be based. The City does not pay for incidental expenses.

VII. RIGHT TO REJECT PROPOSALS AND NEGOTIATE CONTRACT TERMS

The City reserves the right to reject any and all proposals and to negotiate the terms of the contract with the selected Proposer prior to entering into a contract. A response may be rejected if it fails to meet the requirements of the RFP. If contract negotiations cannot be concluded successfully with the highest scoring Proposer, the City may negotiate a contract with the next highest scoring Proposer.

VIII. PROPOSAL DEADLINE AND SUBMISSIONS INSTRUCTIONS

The deadline for receiving proposals is 5:00 p.m. on Friday, April 18, 2025.

Proposers shall submit one (1) electronic version of all materials required for acceptance of their proposal to the following email:

Sarah Weihert, Public Relations Executive Assistant, at
sweihert@fortatkinsonwi.gov

Include the following as the email subject line in proposal submittal: City of Fort Atkinson – Classification and Compensation Study Proposal.

No oral, fax, or telephone proposals will be accepted. All costs directly or indirectly related to preparation of a proposal in response to this RFP or any oral presentation required to supplement or clarify a proposal shall be the sole responsibility of the Proposer. This includes charges for delivery, insurance, license fees, permits, preparation costs and other costs. All proposals submitted shall be signed by an authorized individual to bind the firm, and must be valid for at least 90 days after the date of the proposal opening.

Late proposals will not be considered for review. The City reserves the right to determine the timeliness of all proposals submitted and reserves the right to extend the deadline for proposal submission should such action be in the best interest of the City.

In the event the proposal submission deadline is extended, Proposers will have the right to revise their proposal. Proposals may be withdrawn by written request, signed by an authorized representative of the submitting entity, and submitted to City prior to the scheduled closing time for receipt of proposals.

Submission of a proposal pursuant to this RFP shall constitute acknowledgement and acceptance of the terms and conditions set forth herein. All or portions of this RFP and the contents of the proposal submitted by the successful Proposer may become contractual obligation if a contract is awarded. Failure of the successful Proposer to accept these obligations may result in cancellation of the award. The City reserves the right to either reject any or all proposals if it deems such to be in the best interest of the City and the general public, or to withdraw the RFP at any time without prior notice for any reason, without making an award, if it deems such to be in the best interest of the City and the general public. All proposals submitted in response to this RFP shall become the property of the City.

Any questions concerning this RFP should be directed to Rebecca Houseman, City Manager, at rhouseman@fortatkinsonwi.gov.

Responses to all questions and any revisions/amendments and/or supplements to the RFP will be provided to all those recipients that received this RFP directly from the City, and those that received this RFP from a party authorized to distribute this RFP by the City.

IX. SCHEDULE

- Request for Proposals published by March 19, 2025
- Proposals must be received no later than 5:00 p.m. on April 18, 2025
- Staff review of proposals April 21-25, 2025
- City Council to choose successful Proposer on May 6, 2025
- Project initiated May 7, 2025
- Substantial completion by August 29, 2025

X. CONTRACT TERMS AND CONDITIONS

A. Insurance Requirements

The selected Proposer(s) must meet the City of Fort Atkinson's Insurance Requirements.

B. Ownership

All documents, graphics, maps, and exhibits produced by the selected Proposer(s) as part of a proposal in response to this RFP shall be provided to the City, become the property of the City, and are to be available to the City in any manner the City deems appropriate.

C. Conflict of Interest

The Proposer certifies that to the best of its knowledge no employee of the City, nor any member thereof, nor any public agency or official affected by any contract that results from this RFP, has any pecuniary interest in the business of the Proposer, and that no person associated with the Proposer has any interest that would conflict in any manner with the performance of the contract.

D. Regulations

The Proposal shall meet all current, pending and future regulatory requirements of all authorities having jurisdiction over its design, construction and operation, including the Federal, State and local laws and statutes including Jefferson County and the City.

The Proposer shall fully comply with all applicable laws, regulations, and building codes governing non-discrimination in public accommodations and commercial facilities, including without limitation, the requirements of the Americans with Disabilities Act and all regulations thereunder.

No contract shall be awarded to any person, firm, joint venture, or corporation that is in arrears or is in default to the City upon any debt or contract or that is a defaulter as surety or otherwise upon any obligation to the City.

City of Fort Atkinson Classification and Compensation Study Proposals - Summary Table

Key	Recruitment Firm	Date Submitted	Firm Location	Cost	Invoices	Timeline	Meet Requirements of RFP?		Notes
1	AutoSolve, Inc.	By deadline	Saint Augustine, FL	\$ 31,125.00	3 evenly distributed monthly invoices	4 months	Yes		6 months of consultation & support; 1 in-person meeting; additional work at \$187.50/hr
2	Moss Adams	By deadline	Seattle, WA	\$ 67,650.00	Billed monthly based on work completed	4 months	Yes		
3	The Arnold Group - C3 Compensation Division	By deadline	Wichita, KS	\$ 29,553.00	50% due at kick-off; 50% at completion	2-3 months	Yes		Creation of JDs included at \$7088;
4	Yeo & Yeo HR Advisory Solutions	By deadline	Ypsilanti, MI	\$ 32,800.00	25% at contract execution; 3 more 25% payments throughout project	3 months	Yes		Travel time/expense not included
5	McGrath Human Resources Group	By deadline	Jamestown, TN/Chippewa Falls, WI	\$ 42,075.00	4 installments	4-5 months	Yes		Travel time/expenses included; significant experience in WI
6	MGT	By deadline	Northfield, IL	\$ 20,475.00	50% after initial meeting; 50% at completion	4 months	Yes		Cost does not include JDs; JDs \$250 to update, \$300 to create; Significant experience in WI; 1 year of support included; 100% virtual
7	Gallagher	By deadline		\$ 25,500.00	Billed monthly based on work completed	4 months	Yes		Cost does not include JDs; JDs are \$550 each; 100% virtual
8	Public Administration Associates, LLC	By deadline	Whitewater, WI	\$ 24,525.00	33% at contract acceptance; 33% 7.1; 33% at completion	4 months	Yes		Includes in-person meetings; includes job descriptions; significant experience in WI
9	Paypoint HR	By deadline	Davidsonville, MD	\$ 24,625.00	Billed monthly based on work completed	4 months	Yes		Travel for final presentation included; In person meetings extra at \$1,250/day plus \$2,500 for travel
10	Bolton Rewards	By deadline	Cincinnati, OH	\$ 35,000.00	Monthly billing	3-4 months	Yes		Travel included; assistance with internal communication plan; significant public sector experience
11	Logic Compensation Group	By deadline	Marion, IA	\$ 39,500.00	Billed monthly based on work completed	4 months	Yes		1 year of support included; JDs included



Proposal

APRIL 18, 2025

Classification and Compensation Study

City of Fort Atkinson, Wisconsin

Submitted by:

RACHEL SKAGGS
DIRECTOR

790 FRONTAGE ROAD
SUITE 213
NORTHFIELD, IL 60093

815.303.2187
RSKAGGS@MGT.US

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Cover Letter

April 18, 2025

Rebecca Houseman, City Manager
City of Fort Atkinson
City Manager's Office
101 N Main St.
Fort Atkinson, WI 53538



RE: RESPONSE TO RFP FOR CLASSIFICATION AND COMPENSATION STUDY

Dear Ms. Houseman:

MGT Impact Solutions, LLC (MGT) is pleased to present this response to your recent Request for Proposal (RFP) for a Classification and Compensation Study for the City of Fort Atkinson (City). This response reflects our understanding that the City of Fort Atkinson is seeking a Classification and Compensation Study with a Fair Labor Standards Act (FLSA) review for 32 positions. MGT's response provides the City with related firm qualifications, key experience, a detailed work plan with timeline, and associated fees to provide services that exceed expectations. We are experts in classification and compensation studies and know we would be a perfect fit for the City.

The City's partnership with MGT will provide a transparent process through comprehensive communication strategies that allow stakeholder engagement and public accountability. MGT will update the City's compensation system into a market-competitive framework that provides long-term sustainability. Additionally, we will resolve the City's current pay compression challenges through a data-driven approach that ensures fair compensation differentials while maintaining internal equity across all positions.

We understand human resources (HR) management continues to be a significant concern as governmental services continue to increase in cost and complexity, and the resources to fund local governments are constrained. Day-to-day operations present challenging administrative problems in planning, organizing, and directing human resource functions to achieve maximum efficiency and effectiveness in the delivery of municipal services. A properly developed and administered compensation plan forms the foundation for meeting these challenges. It helps to ensure the City can recruit and retain the best and brightest employees, even in a competitive marketplace. We understand the high expectations that have been established in the City in recruiting and retaining excellent employees. These factors will be taken into consideration in the analysis and reflected in the Study results.

MGT provides comprehensive executive recruitment, interim staffing, HR consulting, and organizational analysis consulting services for local governments, intergovernmental organizations, and school districts, as well as other governmental and non-profit entities. MGT 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.

COVER LETTER

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	Rachel Skaggs, Director – Human Capital Solutions 790 Frontage Road, Suite 213 Northfield, IL 60093 P: 815.303.2187 E: rskaggs@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 **Rachel Skaggs** at **815.303.2187** or **rskaggs@mgt.us**.

Regards,



Patrick J. Dyer, Vice President
Authorized to bind the firm



A. Contractor Statement of Qualifications/Experience

Firm Profile

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 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.

A Social Impact Commitment

DEFINED BY IMPACT

Making a profound impact on society is at the heart of who we are and what we do. The City of Fort Atkinson should be proud to make a difference in the lives of the citizens in your community, and we are proud to work with you toward this goal. MGT will resolve the City's current pay compression challenges through a data-driven approach that ensures fair compensation differentials while maintaining internal equity across all positions.

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 clients' 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.

Experience & Qualifications

We are proud to offer the exceptional expertise of our team members, and our understanding and knowledge of the City of Fort Atkinson's scope based on years of relevant experience. We bring the breadth and depth of knowledge and expertise vital to identifying real, practical solutions that meet our clients' needs. Part of our success is based upon our commitment to be flexible and responsive. We are acutely aware of the political, economic, social, and technological environments of today's public sector environment.

MGT has conducted **more than 270 classification and compensation studies in the past 10 years**. More specifically, MGT's consultants are adept in HR consulting in the state of Wisconsin as illustrated by our list of completed projects below.

- Village of McFarland
- Village of Windsor
- City of Beaver Dam
- Sun Prairie
- Port Washington
- Dane County Cities and Villages Association
- City of Monona
- Village of Lisbon

Why is MGT the Most Qualified to Conduct the City's Study?

- ✓ **Experience.** MGT has the experience and certifications that HR departments need. MGT staff are certified as Senior Human Resources Management Certified Professionals (SHRM-CP), Project Management Professionals (PMP), and Change Management Professionals (CCMP). Additionally, MGT has conducted numerous human capital studies nationwide, such as HR audits, compensation and classification studies, staffing reviews, performance system updates, and organizational reviews. Furthermore, many of our clients are repeat clients, attesting to our acumen for local government human resources consulting services and our desire to work with each public sector client to create a lasting bond that ensures their success over time.
- ✓ **Best Practices Comparisons.** MGT offers the City our extensive experience to identify exemplary management practices — reflective of City input and that of comparable localities. This experience gives us not only a ready reference point for reviewing the City's compensation system but also provides us with practices that have been proven successful in other similar organizations. This knowledge is of significant value when we design recommendations for improvements.
- ✓ **Sound Findings and Data-Driven Recommendations.** In our experience, most major improvements in local government operations require bold thinking. In helping the City reconcile its pay system with its evolution and workforce changes, our team members will not hesitate to question existing organizational structures, programs, policies, rules, statutes, operations, work processes, and staffing patterns. We will make sound recommendations for improvements that produce real — *not just on paper* — savings and ease of future pay administration for the City.
- ✓ **Assistance in the Implementation of Recommendations.** We will not simply leave the City with a report and a plethora of recommendations. We will create detailed implementation strategies to support the City with initial implementation and best practice guidance for maintaining and sustaining an equitable compensation study and classification system over the long-term.
- ✓ **Objectivity and Flexibility.** As an independent entity, our only vested interest is that of the client. Therefore, we will apply our extensive experience to generating objective independent solutions to assist the City to achieve the best outcomes. In addition, we will be receptive to your insights and concerns and will accommodate any changes necessary to ensure the successful completion of project deliverables, a valid and responsive final report and, more importantly, an implementable and flexible compensation system relevant to the City's current realities and beyond.

Project Methodology

MGT uses proven project management methodologies to ensure we deliver project results that are on time, on budget, and meet or exceed client expectations by identifying long-term, decision-making solutions.

We find that the two most critical keys to project success are **planning** and **communication**.

A. CONTRACTOR STATEMENT OF QUALIFICATIONS/EXPERIENCE

We take very intentional measures to define milestones, responsibilities, and delivery dates in our **planning** process, and to track work progress against the work plan daily, providing regular project status reports. After the contract is awarded, we enhance the project work plan that was included in our proposal by adding specific milestones, delivery dates, and consultant responsibilities. We refine this plan with input from our project initiation meeting(s) with the client. We employ problem-solving skills, technology, and staff adaptability to react to variances between work plan projections and actuals to meet the City's deadline.

Throughout this process, we remain in frequent **communication** with the client to avoid surprises or conflict. Our project teams are in regular contact with the City Project Manager, providing regular project status updates and calls to provide a summary of progress and to address any risks or variances from the planned schedule.

Our team's approach to compensation studies is based on the methodologies, models, and tools that we have developed for this specific type of work, coupled with **50 years** of service to public sector organizations across the country. To successfully conduct a study, it is important to fully understand the environment in which an organization operates and the objectives of the study to provide a complete, forward-thinking compensation program and final report.

Proposed Work Plan

To accomplish the City's objectives, MGT will take the following steps listed in the order in which the work will be performed. Please note, we have specified those areas where we will need the City's input/assistance.

TASK 1.0: MEETINGS, SALARY SURVEY, & JOB ANALYSIS

Activities

1.1 Study Preparation and Project Meeting

Meet with City representatives to discuss study methods, review organization charts, personnel policies/practices, and the current classification and pay plans. MGT will review the timeline, answer questions, and review the scope and schedule of work. MGT will require the City to submit a data collection worksheet along with the following information (if available): copies of organizational charts for each department, pay plans, the current personnel manual, and any other relevant information related to salaries.

1.2 Establishing Comparables

Working with City staff and using our broad-based cohort methodology, MGT will determine a logical survey sample of "like" entities that impact the compensation market for the City. In selecting comparable jurisdictions, we use criteria such as number of employees, population served, Equalized Assessed Value (EAV), budget size, and proximity.

In addition, MGT partners with Salary.com and uses their CompAnalyst tool to collect employer reported market data, updated monthly, which is designed to support unique situations, such as hybrid positions, or for collecting private sector market data. CompAnalyst data can be controlled for geographic area, industry, and/or organizational full-time equivalent (FTE) or budget size. All positions included in the scope of this study can be benchmarked to this data source. This data source is also utilized to address gaps

A. CONTRACTOR STATEMENT OF QUALIFICATIONS/EXPERIENCE

in peer data responses from the Market Survey and to provide additional data verification for gathered market survey data. This tool is the most reliable way to gather private sector data.

1.3 Preparing for and Hosting Employee Kick Off Meeting

Shortly after the initial project meeting with the City representatives, MGT will meet virtually with employees to explain the scope of the project and distribute Job Analysis Questionnaire (JAQ) forms. MGT understands many employees have not participated in this type of process before, and we take the time to carefully explain the purpose of the project to the employees and to answer any questions they may have. If any of the employees are not available when these first meetings are held, a recorded presentation of the meeting will be made available to them. Employees will then be allowed two weeks to complete the questionnaire. The questionnaires will also be reviewed by each employee's supervisor and returned to MGT within four weeks of distribution.

1.4 Prepare Market Survey, Survey Distribution, and Follow-Up

MGT will prepare the market surveys to gather data for benchmark classifications in the comparable entities. To accomplish this, the Project Manager will work with City representatives to select benchmark classifications. These positions will be chosen on the criteria of those that are most common in all entities and that cover all the various pay grades in the City. In addition to job titles, brief position descriptions are included in the market survey to make sure we are receiving salary data for "like" positions in the comparable entities. MGT will also use the CompAnalyst tool from Salary.com to gather market data for positions in the Study. The criteria will be determined at the time of analysis.

Note: While MGT will prepare all the materials to be sent out for the market surveys, we have found sending out the survey under the client's email generates a better/faster response than when it is sent out under our letterhead/name. In addition, the City may be asked to make one follow-up contact with those entities that do not initially respond to the survey request.

1.5 Job Evaluation Analysis and Establishment of Job Classification System

Upon return of the JAQs by the City, MGT will perform the following:

- A. Read each JAQ and corresponding Job Description (up to 32), in their entirety.
- B. Prepare for and conduct a virtual interview with at least one employee from each position to further understand the scope of their job.
- C. Analyzing Data, Assigning Skill Levels, and Establishing a Classification Plan:
Apply a measurement system of job evaluation factors, using nine main factors used in our job evaluation instrument to evaluate the internal/comparable worth of each job classification. Upon completion of the job evaluation measurements, a new Classification Plan will be developed. It is important to emphasize the job, not the qualifications or performance of the incumbents, is being evaluated. Part of this process will include the evaluation of current job titles and the recommendation for any changes, assuring the job title and related recommended pay range match the employee's actual tasks.

Note: A formal job evaluation system, such as the one utilized by MGT, is an attempt to objectify the reasons jobs are compensated differently. Most compensation practitioners agree that three basic factors are important in determining compensation. These are: (1) skills required, (2) responsibility, and

A. CONTRACTOR STATEMENT OF QUALIFICATIONS/EXPERIENCE

(3) working conditions. The Equal Employment Opportunity Commission (EEOC) recognizes these three basic factors, along with seniority and performance, as valid determinants of compensation. The nine factors used by MGT are essentially subdivisions of the first three factors mentioned above. In addition, it is MGT's practice that – under Title VII of the Civil Rights Act of 1964, the Americans with Disabilities Act (ADA), and the Age Discrimination of Employment Act (ADEA) – it is illegal to discriminate in any aspect of employment. MGT will not use discriminatory practices on the basis of race, color, religion, sex, national origin, disability, or age when performing a classification analysis. Decisions and recommendations will not be based on stereotypes or assumptions about the abilities, traits, or performance of individuals of a certain sex, race, age, religion, or ethnic group, or individuals with disabilities.

Based on the results of the job evaluation process outlined above, assign all classifications to skill levels. Logical breaks in the continuum of points determine the skill levels used for determining the classification system. For example, skill level 1 might contain jobs that scored between 185 and 200 points, skill level 2 between 205 and 220 points, and so on.

Review the results of the job evaluation exercise with City representatives and revise as necessary.

Deliverables

- Start Up Documents
- JAQ Form

TASK 2.0: DATA ANALYSIS

Activities

2.1 Compiling and Analyzing Market Data and Creating the New Compensation Plan

Tabulate, summarize, and analyze comparative market data. MGT's pay tabulations compare the City's salaries for the positions, with the minimum and the maximum of the market data for each position, when possible. Data is displayed for each jurisdiction and summarized in an overall table. This data is analyzed to determine the percentage difference between the City's present pay for each position and the market data.

MGT will incorporate the market data with the Skill Levels described in Task 1.5 to put together the new Compensation Plan. MGT will work with the City to determine the City's policy (or MGT will make a recommendation) with respect to compensation (i.e., 50th percentile; 75th percentile, etc.). Once this is determined, MGT will use the market data to develop and recommend new salary schedules for the City's 32 classifications. This process will include a recommendation regarding how employees are inserted into the new plan and how they move through the proposed pay plan (either via a merit system or defined merit increment plan), with recommendations for a specific performance-oriented program with respect to salary advancement through the new salary ranges. The salary schedules will outline what the specific percentages are between ranges and grades.

2.2 Preliminary Analysis Review and Training

MGT will meet with the City to review the preliminary analysis. The preliminary analysis is a draft version of the proposed Classification and Compensation Plan. The review can

A. CONTRACTOR STATEMENT OF QUALIFICATIONS/EXPERIENCE

take multiple meetings to ensure that everything is covered, and all questions are answered. MGT will also require feedback from the City on certain aspects of the proposed Plan.

During these meetings, MGT will train designated staff on the use of the system, maintenance, and upkeep of the Plan. A manual outlining the process will be provided to the City.

Additionally, MGT will provide **support services at no additional cost** to the City for one year from the date of an executed contract. This will include any communication regarding questions concerning the report.

Deliverables

- Market Data
- Proposed Pay Plan(s)

TASK 3.0: PROGRESS COMMUNICATION AND UPDATES

Activities

- MGT prides itself on our attention to and communication with our clients as the project proceeds. As such, MGT will strive to maintain regular contact with the City's representative and to be available to address the City's questions, concerns, and needs.
- MGT will share updates with the City as requested, and particularly at critical points in the Study. Additionally, the Project Manager will meet with the City representative, and, if requested, other key staff such as department heads, to review the results of the job evaluation exercise and the proposed new salary schedules.

Deliverables

- Ongoing communication with the City
- Progress Updates

TASK 4.0: DRAFT AND FINAL REPORT PREPARATION

Activities

- 4.1 A draft report will be prepared by the Consultants and sent electronically to the City that includes:
- Executive Summary highlighting the overall scope of the Study and the general observations, outcomes, and recommendations contained within the Report.
 - Summary of all aspects of the Study, including recommendations, methods, and guidelines for achieving the overall aspects of the Study, as well as recommendations for annual maintenance and review of the new plans.
 - Pay ranges that are consistent with the City's pay policy, outlining the pros and cons of each option.
 - Assignment of each position to an appropriate classification and pay grade based on internal equity and marketplace considerations.

A. CONTRACTOR STATEMENT OF QUALIFICATIONS/EXPERIENCE

- Maintenance plan with recommendations on keeping the plan equitable and up to date over the next 5-10 years, and recommendations on review of position descriptions as vacancies arise, evaluation of new position requests, etc.
- Implementation plan and cost estimates of implementing the Study's findings and recommendations.

Note: Overtime costs will not be included, and the analysis will be estimates only, with sufficient detail to allow the City to compare various options.

4.2 Once the City representatives return review comments, a final report will be prepared and sent to the City.

Deliverables

- Draft Report
- Final Report

TASK 5.0: PRESENTATION OF FINDINGS

Activities

The MGT Project Manager will present the finalized plan recommendations and final report to the City.

TASK 6.0: JOB DESCRIPTION UPDATES

Activities

MGT will use the data collected during the job evaluation process to develop new job descriptions for all positions included in the study. MGT will use a consistent format that works with the JAQ process to update the job descriptions and ensure compliance with applicable laws. The following tasks will be performed:

- Review and develop an updated draft job description format, if desired. All job descriptions will be updated in Microsoft Word format.
- Evaluate collected job data for each position from the JAQ to determine each position's current primary job duties, minimum qualifications, job scope and responsibilities, level of authority, knowledge, skills, abilities, specializations, equipment used, and ADA characteristics of the position (i.e., physical, environmental, and sensory).
- Update job descriptions and submit copies to the City.
- Train the City on how to complete updates to the job descriptions in the future.

Deliverable

- A set of updated job descriptions.

Key Personnel

Our work with clients is characterized by the belief that we can only be successful if our clients develop the knowledge, capacity, and mechanisms to help themselves. To that end, all our services:

A. CONTRACTOR STATEMENT OF QUALIFICATIONS/EXPERIENCE

- Build on our clients' existing strengths and resources while empowering them to address present challenges.
- Assist our clients to learn about widely recognized best practices and emerging research.
- Encourage our clients to develop the habit of identifying, collecting, and acting on essential, current, and relevant data.
- Help our clients maximize the efficiency and effectiveness of their human and fiscal resources.
- Provide pragmatic and affordable solutions that will be deliverable and sustainable over the long-term.

The proposed management structure for this project has been designed to define the roles and responsibilities of each team member assigned to this project and to facilitate project management. The strength and experience of our team will allow for efficient and effective project management and results. Each team member has a wide range of project experience working with clients similar to the City of Fort Atkinson. The team we have designated is highly experienced with this type of engagement and therefore requires little orientation time.

Project Staff Roles and Responsibilities

ROLE ASSIGNED	RESPONSIBILITIES
CITY OF FORT ATKINSON REPRESENTATIVE	We look forward to working with the City Representative to build a long-lasting and trustworthy partnership that produces innovative solutions.
PROJECT MANAGER* <i>Rachel Skaggs</i> <i>Katy Yee</i> <i>Rachel King</i>	The Project Manager holds the following responsibilities: ▪ Main point of contact for the City. ▪ Day-to-day management of the project, tasks, and deliverables. ▪ Oversight over service and deliverable quality. ▪ Management of all project deadlines. ▪ Maintains frequent contact with the City Representative throughout the lifecycle of the project.
CONSULTANT TEAM** <i>Alice Bieszczat</i> <i>Julie Hawkins</i>	The Consultant Team holds the following responsibilities: ▪ Work closely with the City under the direction of the Project Manager to carry out the various tasks and deliverables. ▪ Utilize individual subject matter expertise to customize and execute each work task and fulfill the City's stated expectations. ▪ Conduct collection and analysis of relevant data. ▪ Review, document, evaluate, and generate recommendations in accordance with each component of the work plan.

*The Project Manager will be assigned at the time of contract commencement and will be determined depending on workload and commitments at that time.

**Additional consultants with subject matter expertise will be used to assist with employee interviews.

Team Qualifications

Below you will find a brief summary of each team member's qualifications including experience and education.

A. CONTRACTOR STATEMENT OF QUALIFICATIONS/EXPERIENCE

Rachel Skaggs is a seasoned local government professional with over a decade of experience in management, specializing in classification and compensation studies, pay equity, and human resources. She has successfully led more than 150 projects across various municipalities, ensuring that classification and compensation plans are equitable and strategically aligned with organizational goals. Rachel's expertise is backed by her significant contributions to Illinois municipalities, including the Village of Montgomery, Village of Schaumburg, and the City of Princeton, where she demonstrated fiscal responsibility and strategic leadership in her management roles. Rachel holds a Master of Public Administration and a Bachelor's degree in English and Political Science from Northern Illinois University. Her previous roles include City Manager of Princeton, Illinois, and Director at MGT Impact Solutions, where she managed HR functions, budgeting, and community engagement initiatives.

Katy Yee is a highly experienced public sector professional with over 25 years of expertise in human resources and administrative management, specializing in classification and compensation project management. She has extensive experience conducting organization-wide compensation studies, including the application of the Korn-Ferry methodology, ensuring equitable and strategic pay structures. Katy holds a Bachelor's degree in Urban Studies from Elmhurst College and a Marketing Analytics Certificate from Udacity, along with a SHRM-CP certification from the Society for Human Resources Management. Her professional background includes leadership roles such as Director of Human Resources for the Forest Preserve District of Kane County and Director of Organizational Development for the DuPage County Health Department, where she managed initiatives in compliance, accreditation, and service integration. Katy's ability to build relationships at all levels of an organization, combined with her practical and results-oriented approach, makes her uniquely qualified to lead classification and compensation studies with precision and effectiveness.

Rachel King is a skilled Classification and Compensation Project Manager with over eight years of experience in human resource management. She has successfully led more than 30 classification and compensation studies for organizations ranging from small municipalities to large entities serving populations of over 200,000. With a Bachelor's degree in HR Management from Southern New Hampshire University, Rachel's expertise includes compensation management, employee engagement, HR strategy creation, and policy development. She has worked on notable projects such as classification and compensation studies for Livingston County, Michigan, and the Navajo Tribal Utility Authority, Arizona, tailoring solutions to meet the specific needs of organizations. Her previous role as Human Resources Manager at cove.tool showcased her commitment to fostering inclusive workplace cultures, where she played a pivotal role in securing the Great Place to Work certification.

Alice Bieszcza is an experienced Classification and Compensation Specialist with over 25 years of expertise in human resources consulting for municipalities, counties, park districts, special service agencies, and non-profit organizations. Over the last decade, she has led or contributed to more than 150 classification and compensation studies across 21 states, addressing the needs of union, non-union, management, technical, and administrative positions. Alice holds both a Master's and Bachelor's degree in Mathematics from DePaul University, bringing analytical precision to her work. Her consulting background includes projects with institutions such as the Ann & Robert H. Lurie Children's Hospital of Chicago, the Archdiocese of Milwaukee, and numerous public-sector entities.

Julie Hawkins is a dedicated Classification and Compensation Specialist with over 30 years of extensive experience in local government administration and human resources. Completing more than 30 classification and compensation studies in the past year alone, Julie has honed

A. CONTRACTOR STATEMENT OF QUALIFICATIONS/EXPERIENCE

her expertise in personnel policy creation, job description updates, and recruitment studies. She holds a Master of Arts in Public Administration from Northern Illinois University and a Bachelor of Arts in Public Administration and Political Science from Augustana College. Julie's collaborative approach has successfully engaged elected and appointed officials across various municipal, park, library, and water agencies. An accomplished speaker and trainer, she has presented on critical topics such as HR compliance, hiring processes, and performance management, further showcasing her commitment to enhancing public sector HR practices.

Project Understanding

The City of Fort Atkinson is interested in a review of its current classification and compensation plan for employees in approximately 32 positions in the organization. The conducted Study will ensure an equitable compensation system is in place that is both fair and competitive, enabling the City to recruit and retain qualified employees. The system will also be easy to administer in an organized and consistent fashion, as well as sustainable for years to come.

The City's partnership with MGT will provide a transparent process through comprehensive communication strategies that allow stakeholder engagement and public accountability. MGT will update the City's compensation system into a market-competitive framework that provides long-term sustainability. Additionally, we will resolve the City's current pay compression challenges through a data-driven approach that ensures fair compensation differentials while maintaining internal equity across all positions.

MGT has conducted more than 270 classification and compensation studies in the past 10 years. Over 90% of pay plans recommended by MGT have been successfully implemented by the client. All these studies included the use of public-sector salary data and included the following recommendations:

- New classification and compensation plans, assuring internal equity.
- Recommendations for job title changes where appropriate.
- Recommendations on how to deal with specific problems that arose during the study (i.e., compression issues, internal equity issues, market discrepancy issues, etc.).
- Pay plans that were tied to performance.



B. References

A leader in classification and compensation studies.

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.

VILLAGE OF MCFARLAND, WI CLASSIFICATION AND COMPENSATION STAFFING STUDY

Project Dates: 2019

Cassandra Suettinger, WCMC, Deputy Administrator
608-838-3153 | cassandra.suettinger@mcfarland.wi.us
Project Cost: \$31,500

CITY OF BEAVER DAM, WI COMPENSATION STUDY

Project Dates: 2023

Nathan Thiel, City Administrator
920-887-4600 x399 | nthiel@ci.beaverdam.wi.gov
Project Cost: \$21,000

VILLAGE OF LISBON, WI CLASSIFICATION AND COMPENSATION STUDY & JOB DESCRIPTIONS

Project Dates: 2023

Kathy Nickolaus, Village Administrator
262-246-6100 | knickolaus@lisbonwi.gov
Project Cost: \$12,500



C. Compensation

Our cost proposal reflects our interpretation of the written requirements within your solicitation. **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.** We have proposed the entire Study be conducted virtually; however, if the City requests any in-person meetings, MGT will provide an additional estimate for travel and related expenses. By conducting our studies virtually, we can provide significant cost savings for our clients.

In keeping with the above statement of our usual practices, we estimate the fixed fee for the entire study to be **\$20,475** plus other Optional Services (see below). We have listed the cost of our professional fee for each study component below. Payment will be due as follows: 50% of the professional fees will be due after the initial project meeting, and the balance will be billed after the Study is completed. Invoices will be sent to the City and are payable within 30 days of receipt.

NOTE: MGT prides itself on employee inclusion as a vital part of the Study process. This is done by conducting individual interviews with at least one employee in each position. We understand this can be a significant cost. While we highly recommend this process be included, we can remove item B under Task 1.5 if no employee interviews are needed.

Exhibit 1. Proposed Cost by Task

	Milestones and Tasks	Professional Hours	TOTAL (\$)
1.0	Meetings, Salary Survey and Job Analysis		
1.1	Study Preparation and Project Meeting	4	780
1.2	Establishing Comparables	8	1,560
1.3	Preparing for and Hosting Employee Kick Off Meeting	4	780
1.4	Prepare Survey, Survey Distribution and Follow Up	6	1,170
1.5	A. Review and Reading of JAQs and Job Descriptions	7	1,365
	B. Preparation for Interviews and Conducting Employee Interviews	16	3,120
	C. Analyzing Data, Assigning Skill Levels and Establishing a Classification Plan	15	2,925
2.0	Data Analysis		
2.1	Compiling and Analyzing Market Data and Creating the New Compensation Plan	15	2,925
2.2	Preliminary Analysis Review and Training	8	1,560
3.0	Progress Communication and Updates	6	1,170
4.0	Draft and Final Report Preparation		
4.1	Preparing Draft Report	8	1,560
4.2	Final Report	4	780
5.0	Presentation of Findings	4	780
6.0	Job Description Updates	*	*
	Total Hours and Cost:	105	\$20,475

C. COMPENSATION

* Job Descriptions – Updates to existing job descriptions cost \$250 each; new job descriptions, if needed, cost \$300 each. Job descriptions will be completed upon conclusion of the Study and are billed separately.

NOTE: If the City accepts our proposal for this project, MGT will provide **support services at no additional cost for one year** from contract execution. This will include any communication regarding questions concerning the report.

Optional Services/Cost

PROGRESS REPORTS – It is customary to have periodic telephone conversations throughout the Study to provide progress reports. There will be no charge for these periodic telephone updates.

SITE VISITS – If the City requests any on-site visits, there will be additional costs for the MGT's time and expenses.

ADDITIONAL SERVICES – Any additional services not covered in this proposal and requested by the City will be billed at the rate of \$195 per hour plus expenses, including assistance with employee appeals.

This quote is firm and irrevocable for a period of three months, after which prices may increase.



D. Schedule/Timeline

MGT is available to start this project within four to six weeks of acceptance of the proposal. Based on MGT's experience conducting similar projects, we anticipate the proposed project can be completed within approximately 16 weeks of project initiation meeting your August 29, 2025 completion date as illustrated in **Exhibit 2**. The schedule is contingent, however, upon the timely response from the comparable entities supplying the market data, and the employees and supervisors in returning the completed JAQs. Any delays in receipt of this information are beyond the control of MGT and may lengthen the completion of the report.

Job description updates will commence following the completion of the study and are expected to take approximately 60 days to finalize.

Exhibit 2. Proposed Schedule

WORK PLAN TASKS	WEEK															
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Meet with City representatives to discuss Study methodology and expectations.																
Prepare and distribute market surveys to comparable entities.																
Conduct employee meetings, provide JAQs, and explain the purpose of the Study and the process.																
Return of JAQs and market surveys.																
Reading of JAQs and job descriptions.																
Conduct employee interviews.																
Analyze data; prepare new classification and compensation plans; send draft findings to the City.																
Meet with key City representatives to review preliminary findings.																
Receive comments from City																
Prepare Draft Report and send to the City; receive return comments.																
Prepare Final Report.																
Present Final Report to the City.																

MGT



Request For Proposal:

Classification and Compensation Study
City of Fort Atkinson
101 N. Main Street
Fort Atkinson, WI 53538

Due: 4/18/2025 at 5pm.

Submitted By:

AutoSolve, Inc
313 S Forest Dune Drive
Saint Augustine, Florida 32080

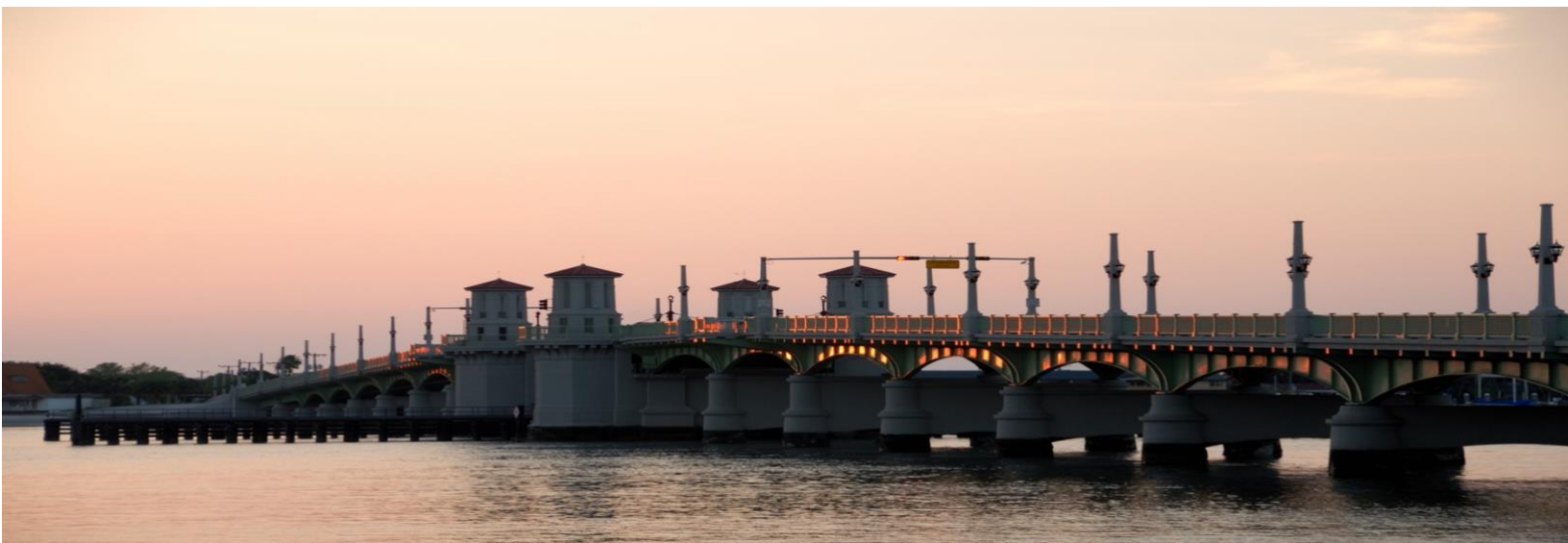


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Cover Letter

April 18, 2025

Rebecca Houseman, City Manager
City of Fort Atkinson
101 N. Main Street
Fort Atkinson, WI 53538
Phone: 920-397-9901 Email: rhousman@fortatkinsonwi.gov

Re: Classification and Compensation Study

Dear Rebecca,

Thank you for the opportunity to submit a proposal to develop a Classification and Compensation Study for the City of Fort Atkinson. The proposed study will provide City of Fort Atkinson with an equitable and competitive classification and compensation system for approximately 100 employees and 32 classifications. Based on the information provided, AutoSolve will complete the study within 4 months of the start date and the target completion date is 8/15/2025.

AutoSolve, Inc. (AutoSolve) is a Human Resources Consulting firm providing services to private and public agencies for more than 30 years. We pride ourselves and attribute our successes to our team's ability to listen, collaborate, and communicate effectively with clients. We will work effectively with your team to develop a custom pay plan that is both internally equitable and externally competitive.

All work will be performed by AutoSolve employees, and we look forward to partnering with the City of Fort Atkinson. This proposal is valid for ninety (90) days from the date of submission.

Thank you for your time and consideration,



Jeff Turner, President
AutoSolve, Inc.
Authorized representative
321-945-8762 | jeff@autosolveinc.com

Background

AutoSolve, Inc. (AutoSolve) is a strategic Human Resources consulting firm headquartered in Saint Augustine, Florida. The firm specializes in business strategy for human resource management, classification and compensation studies, organizational design, business process re-engineering, and strategic planning.

1,000 Clients + 30 Years Experience
Municipalities – County Governments – Higher Education Institutions – K-12 School

Why AutoSolve, A Public Sector Focus

For over 30 years, AutoSolve has been providing value through dedication, entrepreneurial spirit, and professionalism to over 1,000 public and private sector clients. AutoSolve provides tailored made solutions to meet the ever-changing needs of our clients. AutoSolve has been serving local governments and other public sector organizations since its inception.

AutoSolve understands that state and local government organizations operate in a complex environment shaped by fiscal, regulatory, and operational hurdles not commonly found in other industries. AutoSolve provides expertise in organizational design and compensation structure that addresses our client's individual needs. AutoSolve's methodology, proprietary technologies, and expertise allows for a precise and targeted approach to compensation and classification analysis, review and recommendations.

Core Values

We work hard to be a trusted business partner with all clients.

Our core values guide the way AutoSolve makes decisions and conducts business. Employees exemplify core values in their work with clients and in their personal lives. The values illustrated below drive the way we live and work.



PASSION

Drive to achieve our goals.



INTEGRITY

Do the right thing.



PROFESSIONALISM

Bring value, quality, skill, credibility, and customer service.



RESPECT

Treating others how you want to be treated.

Sample of Recent Relevant Projects

The following is a sample list of recent relevant classification and compensation projects.

Sample of Classification and Compensation Projects	State	Employees	Classification / Job Titles
City of North Miami Beach	FL	294	60
Leon County Clerks of the Circuit Court	FL	124	57
Orange County	FL	2,841	260
Athens-Clarke County (Fire Dept)	GA	168	10
City of Americus	GA	153	77
City of Fayetteville	GA	180	85
City of Rincon	GA	117	53
Madison County	GA	459	98
Fayette County Public Schools	KY	3,504	230
City of Hagerstown	MD	125	48
Kansas City Public Schools	MO	2,500	359
Liberty Public Schools	MO	993	127
Raytown C-2 School District	MO	637	130
Town of Rolesville	NC	120	44
City of Boulder City	NV	1,520	160
Carbon County	PA	386	198
Florence School District 3	SC	495	89
Lex-Rich District 5	SC	964	137
Rock Hill Schools	SC	2,400	254
Bedford County	VA	169	81
Charlottesville City School District	VA	1,000	182
Dinwiddie County	VA	470	162
Goochland County	VA	296	163
Harrisonburg City Public Schools	VA	960	226
School District of Beloit	WI	758	218

Contact Information Project Leadership

Company – Florida S Corporation: AutoSolve, Inc.

Date of Incorporation: 11/4/1993

FEIN: 59-3212545

Primary Contact: Jeff Turner

Phone: 321-945-8762

Email: jeff@autosolveinc.com

Address: 313 S Forest Dune Drive, Saint Augustine, Florida 32080

Website: <https://autosolveinc.com/>

Contract Relationships: All work will be performed by AutoSolve employees.

E-Verify #: 2613061

AutoSolve is a Florida Corporation providing services for over 30 years. AutoSolve is in good standing, financially stable, and has no past or pending litigation.

AutoSolve is insured with Hartford Insurance company

Workers' Compensation:

Commercial General Liability:

Professional Liability (Errors & Omissions):

Automobile Insurance:

Statutory Limits

\$2,000,000 per occurrence

\$1,000,000 per occurrence

\$2,000,000 per occurrence

Project Leadership



**Jeff will be the
Project Manager.**

Jeff Turner, PMP, BS Computer Science – Project Manager

Jeff Turner, PMP founded AutoSolve, Inc in 1993. Jeff is a strategy leader who has worked in the management consulting field for the past 30 years, delivering value driven results to over 1,000 public and private sector clients. Jeff provides sound strategic insight to AutoSolve's consulting practices. He has developed highly successful management solutions and methodologies targeted at executive leaders and public sector organizations to build value with a focus in the following ways: Human resource management, classification and compensation review organizational design, business process reengineering, policy design, strategic planning, and succession planning.

Jeff specializes in developing and delivering Human Resource solutions and will serve as the main contact and Project Manager for the classification and compensations study.

Jeff holds a Bachelor of Science in Computer Science from the University of Southern Maine.

Jeff earned his Project Management Professional (PMP) Certification from the Project Management Institute in 2002. Jeff is a Society for HR Management Professional (SHRM).

Project Team



Alex will provide the Qualitative Analysis.

Alex Turner, MS Finance – Senior Compensation Consultant

Alex Turner has 6 years of experience in studying public sector labor markets, and micro and macroeconomic events. Through his experience Alex has provided classification and compensation studies, market research summaries, staffing studies, performance reviews and gender and race audits to over 70 different local governments, K-12 public school districts, and higher education institutions across the country. He has extensive experience in analyzing, developing, and updating compensation and classification plans, and policies for organizations. Alex's expertise includes data analytics, financial modeling and forecasting, strategic planning, and management reviews.

Alex will provide quantitative analysis on the classification and compensation study. Alex has been instrumental in improving the overall delivery of the classification and compensation study processes. He has updated the survey data collecting techniques, classification compensation data model, implementation options model and the pay plan recommendation strategy.

Alex holds a Master of Science in Finance along with a Bachelor of Science in Finance and Minor in Economics from Florida State University.



Sidney will provide the Quantitative Analysis.

Sidney Turner, MS English – Senior Consultant

Sidney Turner has over 7 years' experience in conducting research, organizational design, and education. Sidney has developed and implemented multi-faceted long-term strategies designed to achieve organizational goals for high education institutions. Sidney's expertise includes research and evaluation, efficiency reviews, survey and polling, survey analysis, risk analysis, and technical communication. Sidney has created frameworks for briefing sessions, focus groups and surveys to gain employee acceptance through effective communication. Sidney is our employee engagement expert.

Sidney will provide the qualitative analysis on the classification and compensation study. Sidney has improved the effectiveness of survey execution process to elicit a higher response rate from employees. Her approach to survey analysis allows for a clear understanding of the organization culture and the resulting summary recommendations provide actionable feedback.

Sidney holds a Master's in Rhetoric and Composition, and a Bachelor of Science in Political Science and Literature from Florida State University. Sidney is a PhD. Candidate at Syracuse University.



Chris will provide support for the Survey Platform.

Chris Young, BS Information Technology - Systems Analyst

Chris Young has 7 years of systems analyst experience. Chris maintains AutoSolve's secure cloud survey platform providing a quality customer centric experience for the organization survey and the individual employee survey. Chris expertise includes data analysis and management, survey and polling, and survey analysis.

Chris is AutoSolve's full stack software engineer who has improved the survey process by developing the AutoSolve survey secure cloud platform. The survey platform has provided AutoSolve with the ability to customize the survey to each of our clients' specific needs allowing for quality data collection.

Chris holds a Bachelor of Science in Information Technology and Minor in English from Florida State University.

Executive Summary

At its core, the aim of a classification and compensation study is to align your people strategy with your business strategy. The AutoSolve team recognizes the importance of optimizing your workforce for today while proactively planning for future resource needs. To achieve this, AutoSolve approaches classification and compensation studies as a two-pronged process.

First, we perform an in-depth analysis of your organization's current classification and compensation structure, focusing on the pay relationships and hierarchy between each classification. Our deep dive into your organization's current and future planned classifications allows us to organize and recommend appropriate updates to your classification system. This phase of the study is an opportunity to define pathways for employee growth, eliminate unnecessary classifications, and ensure alignment with business needs. AutoSolve is committed to delivering a streamlined and effective classification system that will serve your organization for years. Classification job descriptions will be updated and reviewed to ensure they are legally compliant following the Fair Labor Standards Act (FLSA) and the Americans with Disabilities Act (ADA) requirements. We will also ensure the job descriptions are internally aligned, accurately illustrating the classification's current responsibilities, duties, and qualifications.

Employee engagement is a key focus of this study. The AutoSolve internal survey functions as a tool to collect qualitative data and insights about the organization, management, culture, work environment, and individual job duties/responsibilities. The primary objective of the survey is to gather feedback directly from employees to share with the management team. This feedback reflects employee sentiment, including both praise and suggestions for improving the workplace environment. AutoSolve delivers a report outlining the core takeaways from the survey analysis, organized into 3 categories: "Workplace Culture," "Infrastructure," and "Relationships with Leadership." Informed by employee responses, we also include "Opportunities for Improvement," which highlight specific material changes and goals that could positively impact the organization's culture and employee experiences.

Second, we perform market research to collect relevant comparable salary data from your regional operating market to accurately assess your external pay competitiveness. The selection of peer agencies is a critical step in the study process. We collaborate with you to identify appropriate peers and will receive approval before proceeding with the compensation survey.

Deliverables

We will create a well-organized pay plan system that fits your organization's objectives and budget while being viewed internally equitable and externally competitive.

Our commitment to you

Throughout the study, AutoSolve emphasizes transparency and provides the necessary level of detail to inspire confidence in the accuracy of the evaluation and its outcomes. Our proposed timeline includes weekly project team status update meetings, with the flexibility to schedule additional meetings as needed. The AutoSolve team understands the importance of participation from all stakeholders in ensuring a successful outcome. These meetings serve as a space to ensure transparency throughout the duration of the study. Furthermore, they are crucial to AutoSolve's collaborative and interactive approach, which enhances the study results and your organization's experience.

The AutoSolve team understands that every organization is different and has their own unique goals and concerns. As such, we strive to provide a tailored made pay plan system addressing your organization's individual wants and needs. The following objectives and methodology outlined in this document serve as a road map of the classification and compensation study.

Communication and Interaction

AutoSolve schedules weekly status meetings for the duration of the study. AutoSolve also provides a detailed work plan that is updated weekly, keeping all stakeholders informed on where we are during each phase of the study. These steps ensure that the study results are accepted and trusted by all levels within the organization. Our collaborative approach ensures a greater understanding of the organization's current needs leading to exceptional study experience with results that are impartial and fair.

Stakeholder Engagement

- Initial study kickoff meeting to review the process and tasks to be performed by the study.
- Weekly touchpoint meetings to discuss the project and review the work plan.
- Jointly agree on comparable agencies to be surveyed.
- Schedule as needed meetings with management and department heads to discuss additional project details.
- Review each section results as they are completed throughout the study.
- Classification review.
- Pay plan review.
- Stakeholder input on compensation philosophy.
- Implementation review.

Study Goals, Objectives, Scope

The goal of the study is to address changes in operations and staffing over the past several years, which may have affected the type, scope, and level of work being performed.

The study will address and resolve recruitment, retention, and compression issues.

- Recruitment becomes difficult when compensation is not competitive or equitable and it is challenging to attract and retain qualified candidates.
- Compression arises when hiring new employees at the same or higher salary than existing employees, creating wage compression. Compression can also occur when equitable pay increase is not provided across the organization.
- Employee Engagement improves when employees are compensated fairly, they will engage and be committed to their job and organization.

Objective

- Attract and retain qualified employees.
- Ensure positions performing similar work with essentially the same level of complexity, responsibility, knowledge, skills, and abilities are classified together.
- Provide salaries commensurate with assigned duties.
- Clearly outline promotional opportunities and provide recognizable compensation growth.
- Provide justifiable pay differential between classes.
- Maintain a competitive position with comparable government entities.

Scope of Work

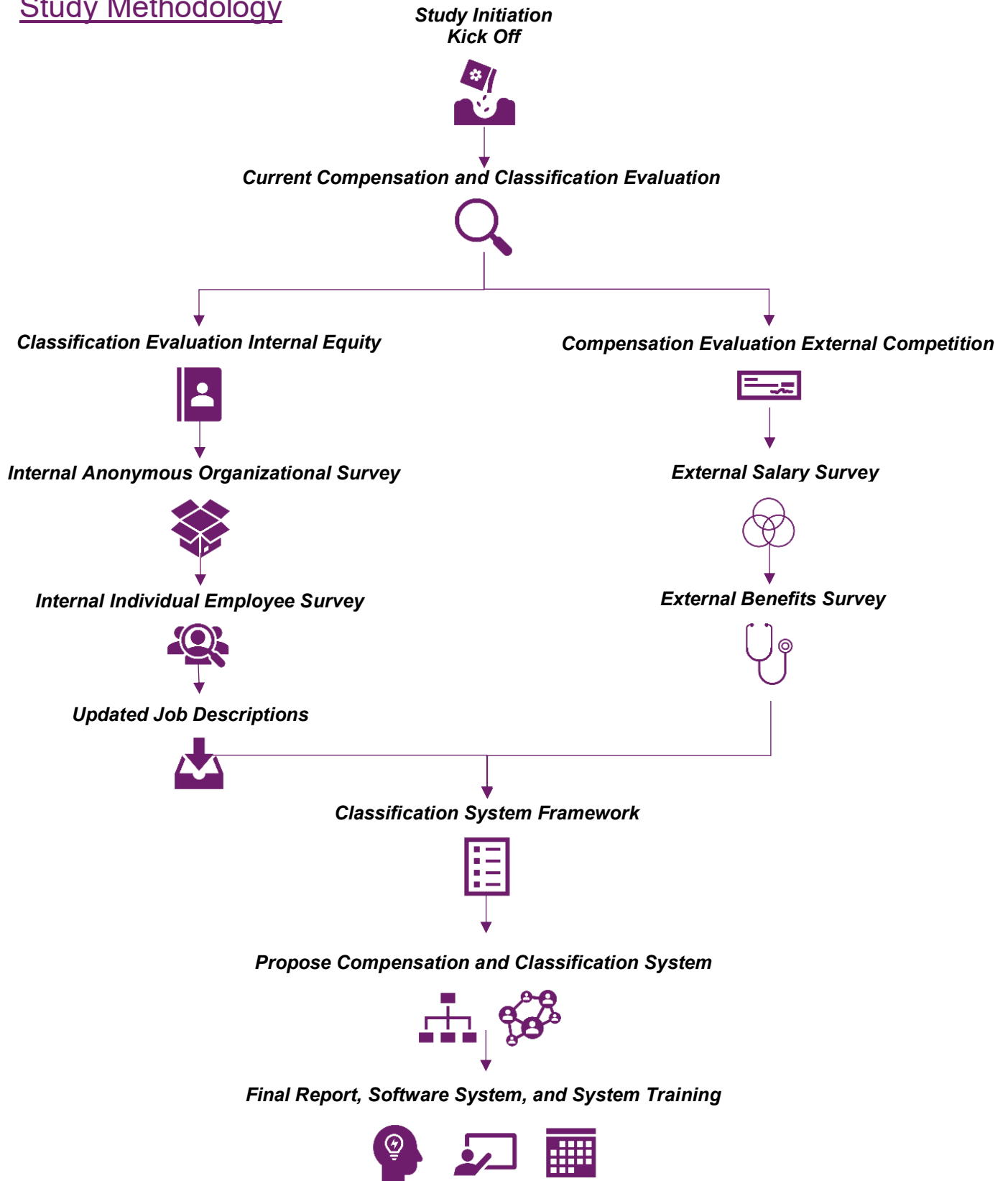
Conduct a classification and compensation study for approximately 100 employees, and approximately 32 classifications / job titles.

Sample of Relevant Peers for the City of Fort Atkinson

AutoSolve is very familiar with the local government agencies in this region. The following is a sample list of potential peers for this compensation and classification study. We will collaboratively determine the peer list, consisting of 10 to 15 comparable organizations for surveying.

Sample of Relevant Peers	State	Population	Distance (Miles)
City of Fort Atkinson	WI	12,579	0.0
City of Whitewater	WI	14,889	9.7
City of Jefferson	WI	7,793	5.9
City of Stoughton	WI	13,173	22.6
City of Watertown	WI	22,926	21.3
City of Madison	WI	280,305	33.2
Jefferson County	WI	85,743	16.4

Study Methodology



Study Methodology Breakdown

The following breaks down each step of AutoSolve's methodology in performing a compensation and classification study.

Study Initiation / Kick Off

The study kickoff meeting sends the signal to all stakeholders that the project has started. We will take this opportunity to provide team introductions, align on key objectives and establish working relationships.

Tasks



- Meet with organization's project team (human resources, associations, unions, and/or key leadership staff) to validate and finalize scope of service, methodology, timetable, and other key deliverables.
- Review work plan methodology for the study.
- Collect current pay plan data including but not limited to employee classifications, employee compensations, employee tenure details; job descriptions; organizational charts; collective bargaining agreements; policy handbook, benefit offerings; etc.
- Review and validate communication plan.
- If needed, additional orientation and briefing sessions will be scheduled to present the project objectives and to address questions/concerns.

Result: Report detailing the finalized study plan with agreed upon deliverables and timeline.

Current Compensation and Classification Evaluation

A key foundational step to this study is AutoSolve's review of the organization's current classification and compensation system. This review allows AutoSolve to make observations and provide best practice recommendations that lead to a clear and concise pay plan.

Tasks



- Analyze the organization's work force based on classification, tenure, pay grade, and current annual/hourly salary.
- Analyze the number of classifications utilized.
- Analyze how an employee fits within their current pay grade. Quartile analysis based on employee's current salary with respect to their assigned salary range and relative to their tenure with the organization.
- Analyze pay compression relative to an employee's current salary and their calculated hire year salary.
- Analyze pay compression relative to an employee's salary and their supervisor's salary.
- Meet with the organization's project team to discuss the pay plan/philosophy.
- Provide recommendations to better align client pay plan system to current best practices.
- Highlight current issues affecting the compensation system that will be corrected by AutoSolve.

Result: Report outlining and illustrating the current workforce classification system and pay plan philosophy.

Classification Evaluation - Employee Engagement - Internal Equity

We foster employee engagement by conducting two internal surveys to gather employee feedback. We provide an electronic version of our questionnaire via a survey link to employees.

The anonymous internal **organizational survey** helps us to understand the employee sentiment within the organization putting forth questions that will provide insight on an organization's culture.

The internal individual **employee survey** provides us with the most up to date job duties and information that will arm us with the knowledge to correct compression found across classifications. This survey will highlight classifications that have similar responsibilities and duties but are compensated differently. The survey will also allow AutoSolve to create/update job descriptions and assist in creating a clear job classification framework based on current duties, skills, and responsibilities.

Both surveys are conducted in our secure cloud survey software platform providing a quality customer centric experience. We will conduct employee focus group and department head interviews as needed.

Tasks



- Meet with the organization's project team to review and designate appropriate scheduling to conduct both the internal organization survey and the individual employee survey.
- Provide survey link for all employees in the study.
- Conduct an anonymous online internal organizational to better assess positives and negatives of the organization's current compensation system, culture, etc. from their employee's perspective. This allows the employees to participate in the study and have their praises and concerns about the organization heard.



- Meet with the management team to receive their input on classifications with retention, hiring, and/or compression issues.
- Ensure position descriptions are in full compliance with all applicable federal, state, local statutes, and regulations, including the FLSA and Americans with Disabilities Act (ADA).



- Employees complete online Position Descriptions Questionnaires (PDQ's). Conduct an online internal individual employee survey. This survey allows us to gather current job responsibilities, duties, education level, required certification, etc. for each classification involved within the study. This survey is the basis for performing job audits, correct compression, conducting our internal hierarchical framework, and updating job descriptions. The survey calls for full employee participation.



- Create updated job descriptions utilizing the findings from the individual employee survey and organization's project team insight.
- Review updated job descriptions with the organization's project team and make revisions. Provide final job descriptions in word format after the completing revisions.

Results: Organizational survey report. Updated job descriptions.

Compensation Evaluation – Salary Survey - External Equity

Collecting relevant market data in your organization's operating market is key to creating an externally competitive compensation system. All data collected is adjusted for cost of living provided by the Council for Community and Economic Research database, ensuring an "apples to apples" comparison.

Along with market data collected from 10-15 peer organizations, AutoSolve will utilize data from the Economic Research Institute (ERI) private sector salary databases. This database provides access to private sector and public sector pay ranges for over 46,000 classifications across 10,000 plus locations globally. This database allows us to compare your organization's classifications and pay ranges against identical classifications and pay ranges found in the private sector and public sector to ensure accuracy of solicited market data.

Tasks

- 
- Meet with organization's project team to identify and reach consensus on a list of relevant peer organizations to be used in the external salary survey. (10-15 peer organizations similar in size)
 - Meet with organization's project team to strategically create a list of positions to survey with appropriate descriptions for peer organizations to provide the correct comparative salary ranges. (Best Practices: Maximum of 80 classifications for external salary survey)
 - Conduct external salary survey by collecting agreed upon peers' salary range data on strategically selected positions.
 - Aggregate and analyze external market survey findings to assess the organization's current compensation system competitiveness within its peer market.
 - Adjust for cost of living to get the most accurate analysis, utilize The Council of Community and Economic Research's database.
 - Utilize private sector salary data from the Economic Research Institute (ERI).
 - Present market data aggregate findings to the organization's project team.



Result: Report summary of market survey findings, comparing the organization's current salary ranges to the surveyed market peers, and highlighting the relative market competitiveness of each surveyed classifications' minimum, midpoint, and maximum salary range point.

Benefits Survey - External Competition



We will conduct an external custom benefits survey based on the agreed upon peer group collecting health insurance, retirement, paid time off and other supplemental benefits data. The benefit survey will provide us with an understanding of the external competitive markets for fringe benefit offerings.

Tasks

- Utilize the same relevant peers from the salary survey.
- Conduct external benefits survey by collecting agreed upon market peers' benefit data.
- Prepare written and illustrated commentary on collected peer benefit offerings

Result: Report summarizing benefits survey findings.

Classification System Framework

AutoSolve's Point Factor System utilizes current duties, skills, and responsibility data collected from the internal individual employee survey to generate a clear job classification framework. This process provides an internally sound hierarchical framework to support the organization's classifications. The classification system framework is utilized in creating the proposed pay plan aligning pay with hierarchy and eliminating pay compression found across classifications.

Tasks



- Incorporating analysis, findings, and recommendations from both the classification review and the compensation review, we utilize a hierarchical scoring mechanism for the placement of positions in the classification system. We will provide recommendations on updating classification placement, addition and deletion as needed.
- The hierarchical grade placement per classification is derived from compensation, job duties, and job impact in the organization and community.
- Meet with organization's project team to present initial classification grading to receive feedback and make revisions.

Result: Report containing a list of all classifications and agreed upon grade / placement within the organization.

Propose Compensation and Classification System

Based on findings and observations from the study and the organizations pay plan philosophy, AutoSolve will propose a compensation and classification system that meets the organization's goals/needs. We will ensure the pay plan aligns with current industry best practices and your budget constraints. AutoSolve will recommend and discuss multiple pay plan options to determine the most effective competitiveness range within the organization's operating market. AutoSolve will recommend and discuss multiple implementation options to determine salary increases for the organization's current employees.

Tasks



- Utilize findings and observations from the conducted study to propose a new pay plan(s) that is(are) externally competitive and internally sound.
- Provide recommended pay grade assignment for all classifications.
- Provide multiple pay plan options to determine competitiveness relative to the organization's operating market.
- Provide multiple implementation cost options to determine the appropriate salary increases for the organization's employees.
- Meet with the organization's project team to present initial system and receive feedback on revising the proposed system. This is an iterative process that requires project team feedback to ensure AutoSolve will provide a system that will meet all the organization's needs for the next two to three years.
- Review all pay plan and implementation options and select the one that corrects any issues observed from the conducted study and that aligns with the organization's compensation philosophy.
- Develop recommended strategies for setting hiring rates for new and promoted employees.

Result: Propose pay plan(s) and implementation options.



Final Report, Summary Report, Software System, System Training, Present Findings



We will prepare a final report to include all aspects of the classification and compensation study. This report will be accompanied by a Summary Report that pulls key highlights, findings, and the results from the study. We will also provide a propriety custom employee pay plan software management system. This system represents the proposed compensation and classification system derived from the conducted study.

Tasks



- Prepare a final report illustrating project findings and recommendations.
- Prepare summary report consisting of key finding ins and recommendations.
- Present findings and recommendations at a public meeting of the organization's stakeholders at an agreed upon date either in person or virtually.
- Provide a custom employee pay plan software management system. The employee pay plan management system will be a workable excel file that incorporates the recommended pay plan and implementation option. The pay plan management system outlines the estimated cost to move all employees into the proposed compensation system based upon the chosen implementation option and pay plan competitiveness. The system is also design for continual pay plan management. The management system also allows the organization to add and remove employees, adjust classification assigned grades, estimated employee increases after the implementation is complete.
- Prepare an in-depth manual and training video for maintenance of the recommended classification and compensation pay plan management system.

Results: Final report, Summary Report, New pay plan management system, Maintenance/training manual and a maintenance/training video, Present Findings.

Compensation System Post Study Support

AutoSolve is committed to providing the highest-quality product and service. At the completion of each study, we provide a complimentary six (6) months of consultation and support. We also offer paid support packages.

Year One (1) – Support Package / Optional Maintenance

- **First six months support offered at no charge.**
- **Optional second six months prepaid support.**
- New classifications and placing them in the proper grade relative to the operating market and internal hierarchy.
- Re-grading current classifications on an as needed basis.
- Writing job or updating job descriptions on an as needed basis.
- Ad hoc labor market research in client's operating market on a as needed basis.

Year Two (2) – Support Package / Optional Maintenance

- New classifications and placing them in the proper grade relative to the operating market and internal hierarchy.
- Re-grading current classifications on an as needed basis.
- Writing job or updating job descriptions on an as needed basis.
- Ad hoc labor market research in client's operating market on a as needed basis.
- Market survey to analyze how the new salary ranges fall competitively within the client's operating market after one year of implementation.

Study Availability and Timeline

Firm Availability

AutoSolve maintains the following hours of operation:

- Monday through Friday: 8:00 a.m. to 5:00 p.m. Eastern Daylight Time.
- Our assigned personnel will be available throughout the term of the contract.
- Workplace location is virtual.
- Communications will be conducted through virtual meetings, phone calls, and email.
- AutoSolve will support Central Daylight Time standard business hours.

Assumptions

- Client will provide requested data in a timely manner.
- Client employees will perform internal survey in a timely manner.
- Peers will provide requested market data in a timely manner.

Timeline

Timeline estimated at 14 working weeks.

- Study timeline – 5/7/2025 to 8/15/2025.
- Our timeline is flexible and will adjust deliverable dates, taking into consideration national holidays and vacation schedules.
- AutoSolve is prepared to start the compensation study within 2 weeks after official notice of award.

City of Fort Atkinson, WI 5/7/2025 to 8/15/2025

Timeline & Milestones	May				June				July				August			
Study Initiation																
Kick Off																
Project Management (14 weeks)																
Current Pay Plan Evaluation (3 weeks)																
Classification Evaluation (7 weeks)																
Compensation Evaluation (7 weeks)																
Classification Framework / Compensation Management System with Implementation Options (3 weeks)																
Final Report, System Training (3 weeks)																
Complimentary Support - (6 months)																

Green - Kick Off

Purple - Working Weeks

Black - Holiday Week

References

REF 1: Dinwiddie County, Virginia – Classification and Compensation Study

Contact: Kevin Massengill, County Administrator

Email: kmassengill@dinwiddieva.us

Phone: (804) 469-4500 ext. 2105

Services Provided: 2024

- Completed a comprehensive classification and compensation study for Dinwiddie County, Virginia, consisting of 470 employees and 153 classifications.

REF 2: City of Americus, Georgia – Classification and Compensation Study

Contact: Ola Terrell-Jordan, Human Resources Director

Email: oterrell-jordan@americusga.gov

Phone: (229) 924-4411 ext. 248

Services Provided: 2024

- Completed a comprehensive classification and compensation study for the City of Americus, Georgia, consisting of 153 employees and 77 classifications.

REF 3: Town of Rolesville, North Carolina – Classification and Compensation Study

Contact: Lisa Alston, Human Resources Director

Email: lisa.alston@rolesville.nc.gov

Phone: 919-556-4642

Services Provided: 2024

- Completed a comprehensive classification and compensation study for Town of Rolesville, North Carolina, consisting of 120 employees and 44 classifications.

REF 4: City of Rincon, Georgia – Classification and Compensation Study

Contact: Tiffany Herbert, Human Resources

Email: therbert@rinconga.gov

Phone: (912) 826-5745 ext. 102

Services Provided: 2024

- Completed a comprehensive classification and compensation study for the City of Rincon, Georgia, consisting of 117 employees and 53 classifications.

REF 5: Athens-Clarke County, Georgia – Fire Department Classification and Compensation Study

Contact: Sara Ivy, Assistant Human Resources Director

Email: sara.ivy@accgov.com

Phone: (706) 400-6368

Services Provided: 2025

- In Progress a fire department comprehensive classification and compensation study for Athens-Clarke County, Georgia, consisting of 168 employees and 9 classifications.

Cost of Service

Study Size

Classification and compensation study for approximately 100 employees, and approximately 32 classifications / job titles.

Total Proposed Fixed Fee

Total Fixed Fee Not to Exceed: \$31,125.00

Fixed Fee Payment Schedule

Preferred payment type: ACH/EFT. Three (3) evenly distributed monthly payments.

Preferred payment terms: Due upon receipt. The first invoice will be sent after the project kick off meeting.

City of Fort Atkison, WI Detailed Cost Summary

Tasks	Hours	Cost
Project Initiation Kick Off Meeting	2	\$375.00
Project Management (14 weeks)	18	\$3,375.00
Current Pay Plan Evaluation (3 weeks)	18	\$3,375.00
Classification Evaluation (7 weeks)	51	\$9,562.50
Compensation and Benefit Evaluation (7 weeks)	44	\$8,250.00
Classification Framework / Compensation Management System with Implementation Options (3 weeks)	18	\$3,375.00
Final Report, System Training (3 weeks)	15	\$2,812.50
Complimentary Support - (6 months)	0	\$0.00
Total	166	\$31,125.00

Post Project Support Package / Optional Maintenance (Yearly)

Year One (1) Support Package

- First six (6) months included for no charge.
- Additional six (6) months prepaid maintenance \$6,000.00.

Year Two (2) Support Package

- Twelve (12) Months Prepaid Maintenance \$12,000.00.

Travel Expense

Anticipated Travel:

- One in person meeting to discuss recommendations, findings, and final report.
- All other meetings will be performed virtually.

Other Expenses

Other reasonable business expenses may be encountered.

If expenses are encountered, approval will be obtained prior to incurring cost.

Expenses will be billed at actual cost accompanied by a receipt of the transaction.

Additional Work

If additional work is authorized, hourly rate \$187.50.

CLASSIFICATION AND COMPENSATION STUDY PROPOSAL

Submitted by:



Logic Compensation Group

April 18,
2025

Prepared for:
City of Fort Atkinson, WI

Business Address:
4395 Flagstick Drive
Marion, IA 52302
Phone: (303) 916-9180

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LETTER OF INTRODUCTION

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

Sent via email to Sarah Weihert, Public Relations Executive Assistant at sweihert@fortatkinsonwi.gov

Classification and Compensation Study Proposal

Dear City Representatives:

Logic Compensation Group (Logic Comp) is pleased to submit our proposal for conducting a classification and compensation study of approximately 32 non-represented classifications for the City of Fort Atkinson. This study is similar to our work for several public sector organizations nationwide and in the Midwest.

Logic Comp is a client-focused, boutique consulting firm offering our clients the advantages of flexible, responsive, and highly tailored strategies and solutions in classification and total rewards. Our practice approach provides high-contact service and cost-effective solutions for public sector organizations. Logic Compensation Group:

- ❖ Has over 125 years of combined experience as consultants to and managers of public sector organizations.
- ❖ Utilizes a low-overhead model, which means that cost savings are passed directly to our clients.
- ❖ Possesses the resources and experience of large firms while remaining flexible and responsive to our clients' needs. Logic Comp is mindful that each client deserves individual attention, a customized approach, and tailored solutions.

Logic Compensation Group is a team of highly skilled classification and compensation professionals. Our focus, mission, and expertise are centered on public sector organizations like yours. Logic Comp offers a level of client interaction, familiarity, and value-added service rarely found in larger firms.

I will negotiate all terms and conditions with the City of Fort Atkinson. This proposal will be valid for 90 days from the date of this letter. Our business contact information is:

Logic Compensation Group, LLC

112 E. Palmcroft Drive
Tempe, AZ 85282
P: Phone: (480) 431-4702



Logic Compensation Group
Total Rewards Consulting

W: LogicCompGroup.com
E: Lori.Messer@logiccompgroup.com

Logic Compensation certifies that this request for bid has been fully read and we understand the proposal method and have full knowledge of the scope, nature, and quality of work to be performed.

Should you need additional information, please contact me, Lori, at (480) 431-4702 or Lori.Messer@logiccompgroup.com or Annette Hoefer at (303) 916-9180 or Annette.Hoefer@logiccompgroup.com.

Respectfully,

LOGIC COMPENSATION GROUP, LLC

A handwritten signature in black ink, appearing to read "Lori Messer". The signature is fluid and cursive, with the first name "Lori" being more prominent than the last name "Messer".

Lori Messer, Managing Director



A: CONTRACTOR STATEMENT OF QUALIFICATIONS/EXPERIENCE

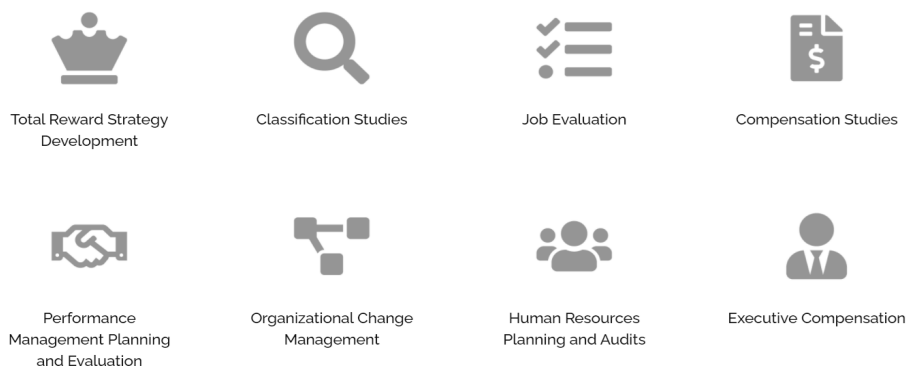
1. The Logic Comp Story and Methodology

Logic Compensation Group is a limited liability company that began in 2019. The company is staffed by seasoned total rewards professionals with experience in Fortune 500 classification and compensation consulting, previous ownership of other consulting businesses, and direct practitioner and leadership experience working with public sector, private sector, and not-for-profit organizations. Our consultants have decades of experience in the field, both individually and as colleagues. Many of our team members previously worked together before forming Logic Comp. Our firm is woman-owned.

Logic Comp has offices across the United States, with staff in Arizona, Iowa, California, Texas, and Maryland. Our leadership team is based in Tempe, Arizona, and Marion, Iowa, and staffed by a Managing Director or Principal Consultant. Annette Hoefer, of our Iowa office, will provide services to the City. Our contact information is as follows:

ARIZONA	IOWA
112 E. Palmcroft Drive Tempe, AZ 85282 Phone: (480) 431-4702 Managing Director Lori Messer, MA, CCP Lori.Messer@LogicCompGroup.com	4395 Flagstick Drive Marion, Iowa 52302 Phone: (303) 916-9180 Principal Consultant Annette Hoefer, MBA, CCP Annette.Hoefer@LogicCompGroup.com
FEIN Number: 84-2864177 URL: https://logiccompgroup.com	

With extensive public sector and human resources experience, our firm can offer our clients a variety of core and value-added services, including:



Logic Comp was formed to bridge the disconnect between the revenue and volume objectives of a large consulting firm and the personalized attention and solution needs of public sector clients. Logic

Comp is committed to providing high-touch, cost-effective services tailored to our clients' needs, while limiting the number of studies we are engaged in at any given time. This approach enables us to focus on client goals, quality of work, and successful study implementation. Our processes are highly collaborative and designed to educate and engage all stakeholders, thereby increasing the likelihood of a successful study and a positive implementation experience. Our business model, knowledge base, and expertise are focused on the public sector.

Members of the Logic Comp team have served government clients with employee populations ranging from 3 to over 10,000. The following table demonstrates a small sampling of organizations our consultants have served with Logic Comp and other consulting firms. The Logic Comp team members have collectively served over 250 public sector organizations as consultants. References are found in Section B: References.

Listing of Clients			
AZ	City of Avondale	IA	Linn County
AZ	City of Tolleson	IA	City of Grinnell
AZ	Creighton School District	IA	Des Moines Water Works
AZ	Town of Queen Creek	IA	Cedar Rapids Community Schools
AZ	Town of Wickenburg	KS	City of Tonganoxie
AZ	City of Chandler	KS	City of Pittsburg
AZ	City of El Mirage	TX	City of Iowa Colony
AZ	City of Surprise	TX	City of Richmond
AZ	WillScott Mobile Mini Holdings	TX	City of Taylor
CA	City of La Quinta	TX	Dallas Police and Fire Pension System
CO	State of CO Office of the Public Defender	TX	City of Manvel
CO	Colorado Office of the Attorney General	OR	Hood River County
CO	Gunnison County	WA	Crook County
CO	La Plata County	WA	City of Seattle
CO	Summit County	WA	City of Tacoma
CO	Town of Frisco	WA	Community Transit
CO	STRIDE Community Health	WA	Kitsap Transit
CO	CO Office of Legislative Legal Services	WA	Port of Moses Lake
NC	City of Durham	WA	Port of Tacoma
NV	Clark County	WI	Wisconsin Attorneys Association

Client satisfaction and exceeding expectations are the mission and goal of Logic Comp consultants. Quotes from our clients include:

"You are the most talented comp consultant I have ever worked with."

Human Resources Director for a Colorado resort city

"We appreciated so very much all of the hard work and help you provided us in developing a great plan for the City."

Compensation & Benefits Manager of a southeastern city

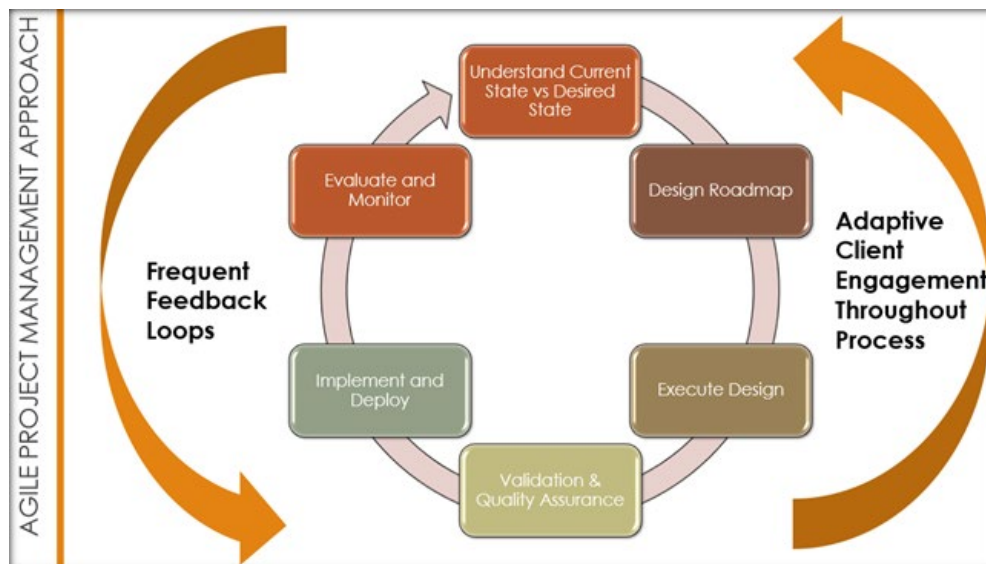
"Thanks so much for all you do for us, never forgetting to recognize your prompt and thorough analysis 😊!"

Human Resources Manager of a western slope Colorado county

"I rate Logic Compensation Group as a 10. Logic Compensation Group has become our vendor of choice for compensation projects. They consistently produce an excellent product that can be relied on for board decision-making and union negotiations."

Human Resources Director of a Midwest county

Our execution strategy incorporates proven methodologies, qualified personnel, and a highly responsive approach to managing deliverables. We understand that as we progress through the process, we may need to adjust our approach based on the information we gather during each phase of the study. Therefore, we have developed a thoughtful process that is designed to facilitate a successful outcome. Our agile project management approach entails processes that incorporate an adaptive approach and frequent feedback loops to achieve the City's desired outcomes.



During the course of the City's study, we will plan biweekly video meetings with your study team to discuss study progress, issues, and questions. Unique to Logic Comp and after the study is complete, we conduct quarterly complimentary meetings with your study team for the next year, addressing any classification and compensation concerns or questions.

2. The Logic Comp Team

A Managing Director or Principal Consultant leads each study, each with over 25 years of experience providing direct services to public sector clients and a direct line of sight to all deliverables. Our experienced leaders manage studies and perform technical tasks, including writing job descriptions, conducting interviews with employees and managers, following up on survey responses, analyzing pay and benefits data, and delivering executive presentations. Due to our hands-on approach, all consultants at each level continually maintain and upgrade their technical skills to deliver client work effectively. Our consultants are members of *WorldatWork*, ICMA, and PSHRA, ensuring that we remain current on the latest trends and best practices.

Annette Hoefer will be the Project Manager for your study, and she is located in Marion, Iowa. Annette's resume is included in this section. Other consulting team members will assist Annette in providing services to the City.

LORI MESSER, MA, CCP – Managing Director

Study Responsibilities: Lori is the firm's Managing Director. During the study, Lori will provide quality assurance for services and deliverables provided to the organization.

Professional Background: Lori has over 30 years of experience in compensation, serving as both a consultant and practitioner. Lori has worked with various public and private sector organizations, including states, cities, counties, school districts, colleges and universities, and special districts. Immediately before starting the firm, Lori spent seven years working as a Senior Consultant and subsequently as the Principal Consultant for Gallagher Benefit Services' West Coast office, focusing on human resources and compensation consulting in the public sector practice. Previously, Lori held various consultative human resources and compensation positions in high-tech, distribution, healthcare, and local government organizations.

Lori has a bachelor's degree in business administration from Arizona State University and a master's degree in education from the University of Phoenix. She is also a member of *WorldatWork* and has earned her CCP certification. Lori serves on the Merit Board for the City of Tempe, Arizona.

ANNETTE HOEFER, MBA, CCP – Principal Consultant

Study Responsibilities: Annette is a Principal Consultant for the firm. During the City's study, Annette will serve as the study manager and primary contact, overseeing the study and providing direct services.

Professional Background: Annette has spent over 30 years performing classification and compensation studies for the public sector as a Senior Consultant with Lee & Burgess Associates, Fox Lawson & Associates, and Gallagher Benefit Services' Human Resources and Compensation Consulting public sector practice. Clients include cities, counties, states, and special districts such as utility and transit organizations. As a compensation specialist, she has also occupied human resources positions in the healthcare, energy, and insurance industries.

Annette holds a bachelor's and master's degree in Business Administration from the University of Iowa. She has earned her CCP certification. She previously served as a board member for the Rocky Mountain Compensation Association.

ANDREA GILLMORE, MSC, PMP - Consultant

Professional Background: Andrea has over 15 years of experience serving state, county, and municipal public sector agencies in California and Arizona. Andrea specializes in management and human resources support, with a focus on compensation and project management over the past six years. Andrea has successfully completed multiple classification and compensation studies in the public sector. She understands the nuances and unique requirements that accompany government organizations, bringing a dedication and passion for developing custom solutions to meet stakeholder needs.

Andrea has a bachelor's degree in psychology from the University of Phoenix and a master's degree in counseling from the same institution. She is also a certified Project Management Professional (PMP).

KAREN WELCH, MBA, PMP – Consultant

Professional Background: Karen has over four years of experience conducting classification and compensation studies for the public sector, including work at Gallagher Benefit Services' Human Resources and Compensation Consulting division. Karen has direct experience supporting public sector and non-profit clients across the country in the performance of classification and compensation studies. With that practical knowledge and over 30 years of business experience, Karen understands the tremendous effort it takes for organizations to identify, transform, and achieve their goals.

Karen has a bachelor's degree in business from Northern Arizona University and a master's in business administration from the University of Phoenix. Karen is also a certified Project Management Professional (PMP).

MADLINE THOMAS, BS – Consultant

Professional Background: Madeline has over three years of experience performing classification and compensation studies for the public sector. Madeline attended Arizona State University, earning a bachelor's degree in mathematics with a specialization in statistics. Madeline is currently pursuing her CCP certification from *WorldatWork*.

BRUCE G. LAWSON, MPA, CCP, IPMA-SCP – Technical Advisor

Professional Background: Bruce has directed and performed classification and compensation studies for over 35 years, domestically and internationally. Bruce was a founder and Managing Partner with Fox Lawson & Associates LLC and subsequently a Managing Director at Gallagher Benefit Services' Human Resources and Compensation Consulting public sector practice. Before forming Fox Lawson, he spent 15 years with Ernst & Young LLP, serving as the national director of their public sector compensation consulting practice. He also served as City Manager in two California cities (Los Altos Hills and Belvedere), was the Administrative Officer in Multnomah County (Portland), Oregon, Assistant City Manager/Personnel Director in Corvallis, Oregon, and Assistant to the City Administrator/Personnel

Director in Placentia, CA. Bruce served on the City of Phoenix's (AZ) Public Safety Employees Retirement Board for 12 years.

Bruce has a master's degree in public administration from California State University at Fullerton, is an a.b.d. in public administration from Golden Gate University in San Francisco and has earned his CCP certification from *WorldatWork*. He is also an active member of several professional associations, including the International City & County Management Association, the International Public Management Association for Human Resources, the Society for Human Resources Management, and *WorldatWork*.

SANDY SPELLMAN, MPA, CCP – Technical Advisor

Professional Background: Sandy has over 30 years of experience in comprehensive consulting with public sector organizations. She specializes in classification, communications, human resource strategy, process, performance management, and employee and management focus group meetings. Sandy has worked with numerous organizations, including state, city, county, college, university, and federal government entities. Before joining the firm, Sandy was a Senior Consultant at Gallagher Benefit Services' Human Resources and Compensation Consulting public sector practice for 12 years. Prior to Gallagher, she spent 18 years with Ernst & Young's consulting practice, where she was responsible for client and internal change management, communications, and training strategies. She has also held state executive and legislative positions addressing a wide range of human resource and related issues.

Sandy has a bachelor's degree in sociology/political science from Arizona State University and a master's degree in public administration with an emphasis in organizational development from the same institution.

3. Understanding of Services

This comprehensive classification and compensation study will include approximately 32 non-represented classifications. Logic Comp's understanding of the objectives of the study is as follows:

1. Ensure the organization's external market equity is assessed for the non-represented salary structure and its jobs.
2. Address internal equity and alignment, as well as FLSA status, for non-represented jobs.
3. Update the non-represented job descriptions and classifications as needed.
4. Review and alleviate compression issues.
5. Ensure the classification and compensation system is and stays competitive and flexible in the future for the attraction and retention of employees.
6. Ensure the City has education in classification and compensation and has access to a consulting partner providing ongoing support and mentorship.

The City's RFP does not specifically ask for a work plan. Logic Comp provides this additional information to better inform the City for its decision-making and understanding of our professional, established processes for supporting our client partners.

Work Plan

Phase 1: Study Initiation

Logic Comp will conduct several activities to establish the process and objectives for an on-time, on-budget, and successful study. A study initiation meeting with your organization's study manager or team and a classification and compensation document review will be conducted.

Our general approach, consistent with best practices for the success of a study of this nature, is to begin by understanding our clients' overall compensation philosophy and associated strategies. The information gained from this initial meeting with the City will provide a roadmap for the study and recommendations. This activity helps to define the comparative market, where, in relation to the market, the client wants to position itself, and any other relevant information that would be beneficial as we embark upon the study. Once this strategy is understood, it is then possible to establish classification and compensation systems that ensure employees are paid equitably in relation to other jobs within the organization and in accordance with the organization's desired pay targets in the market. We will review the City's current strategy and update or develop it if one does not currently exist.

During this phase, as we review the study parameters, biweekly meetings will be initiated via video or conference call with the organization's study manager or team to inform them of the study's progress and address any concerns.

Activities: One-day on-site meeting
Organization, classification, compensation, job description, and policy materials are collected and reviewed by Logic Comp.
A study initiation meeting with the City's study team is conducted to establish study parameters and overall study goals, and review current systems and related items.
Study timetable refined and dates approved.
Logic Comp will ensure that the classification and compensation strategy reflects your organization's current or desired processes and best practices. Update or develop a classification and compensation philosophy.
Logic Comp leads the discussion with the organization of comparable organizations and benchmarks for the survey.
Deliverables
❖ Study initiation meeting. ❖ Study plan and schedule. ❖ Classification and compensation philosophy. ❖ Survey specifications. ❖ Biweekly meetings with the City's study manager or team.

Client Role

- ❖ Provision of requested materials on a timely basis.
- ❖ Scheduling of meetings.
- ❖ Provision of study communication materials throughout the study to Logic Comp in advance of publication to ensure consistency and accuracy of communications.
- ❖ Participation in the biweekly study team meeting.

Phase 2 – Classification

The City would like to review and update its classifications, job descriptions, and FLSA status. Classification is the process of understanding, verifying, and describing the nature and level of work associated with each job within an organization.

Classification and position data will be collected from existing job descriptions and employee-completed Position Description Questionnaires (PDQs). Logic Compensation will introduce City employees to the PDQ during Phase 1 and provide instruction on completing the PDQ and the overall study process.

Based on the information gathered through the review of PDQs, study team discussions, and current job descriptions, updates to the classification structure, including possible titling changes, consolidation, and/or expansion of classifications, will be recommended to the City. These updates will align with the City's organizational structure and strategy. Logic Comp consultants will review the recommendations with the City's study team to discuss any necessary adjustments.

Job descriptions will be updated to ensure consistency, format, accuracy, and compliance with relevant laws. Logic Comp will develop these job descriptions in alignment with classification recommendations, utilizing information gained from the PDQs and current job descriptions. Logic Comp will work with the City to develop an updated format for the job descriptions. These job descriptions will also align with best practices and legal requirements. Logic Comp will also make FLSA recommendations for each classification.

Activities

All City employees included in the study will complete a PDQ. To ensure PDQ accuracy, Logic Comp guides employees through the PDQ and explains what is required to complete each section.

Based on the information gathered in the PDQs and existing job descriptions, recommendations will be made. Logic Comp consultants will meet with the study team to explain the classification recommendations, seeking feedback to finalize the classification structure.

Logic Comp will develop updated and/or new job descriptions in a format approved by the City. The specifications will uniformly reflect distinguishing characteristics, essential job functions, minimum qualifications, working conditions, certification, license, and registration requirements, and will comply with all applicable laws and regulations, including FLSA status. One set of revisions is included.

Activities
Deliverables
❖ Position Description Questionnaire (PDQ) document. ❖ Updated and/or new job descriptions based on approved classification recommendations, including FLSA recommendations. ❖ Biweekly study team meetings.
Client Role
❖ Coordination of the internal completion and collection of the PDQs. ❖ Review and approval of the recommended classification structure updates and job descriptions. ❖ Participation in the biweekly study team meeting.

Phase 3: Compensation Survey

This phase will assess how the City's non-represented compensation program and jobs compare to the relevant labor market. Through the survey process, data are collected and analyzed to determine the market position of your organization's jobs. Logic Comp will collaborate with your organization to confirm the labor market.

A survey is developed to collect the appropriate pay data comparison information. We anticipate that all 32 non-represented jobs will be surveyed. This survey document will be distributed to an approved list of potential survey participants. Currently, we anticipate that up to 20 organizations will be surveyed. If the City would also like to include published survey data, this information can be incorporated using credible, published survey sources, such as the Economic Research Institute's salary database. Logic Comp will ensure that the data received are accurate and that a competitive analysis is conducted, including the consideration of time or geographic adjustments. The market position of the City's jobs will be determined, and Logic Comp will make recommendations for updates to the compensation structure and placement of jobs within that structure.

Activities
Logic Comp will partner with the City to determine the organizations to survey that will be included in the organization's defined labor market. Currently, we anticipate all non-represented jobs and up to 20 organizations will be surveyed.
A customized survey is developed to collect comparable pay data from labor market organizations. This document is reviewed and approved by the City before distribution.
As appropriate and confirmed by the City, published survey pay data, if requested, is collected and included in the analysis.

Activities
The survey is distributed via email, and Logic Comp consultants follow up with the surveyed organizations to encourage participation, address questions, and ensure data quality. Survey data are reviewed and analyzed according to specifications determined in partnership with the City. Time and location adjustments are considered and applied to the data as appropriate to ensure that the data reflect the City's labor market, economic conditions, and plan implementation date.
Logic Comp analyzes the competitive position of City pay in relation to the market. The results of the classification phase and the market survey are reviewed with the City and used to make recommendations in alignment with the City's classification and compensation philosophy.
Transition from the existing to the updated system is discussed. Considerations will be given to budget constraints, pay compression concerns, and current personnel practices. The estimated cost for up to three (3) transition options will be developed and analyzed.
Deliverables
❖ Listing of organizations and benchmarks to include within the survey. ❖ Survey document. ❖ Results of the pay survey. ❖ Recommendations for compensation structure updates. ❖ Implementation costing and planning. ❖ Biweekly study team meetings.
Client Role
❖ Review and approval of the comparator organizations, benchmark jobs, and the survey. ❖ Provision of the survey contact information as needed. ❖ Completion of the survey document as if the City were a participant in the survey. ❖ Participation in the biweekly study team meeting.

Phase 4: Study Recommendations and Report

Logic Comp prepares and presents a study report to the City, summarizing the study process and its related findings and recommendations. Logic Comp consultants will provide in-depth explanations and approved deliverables throughout the process, culminating in the comprehensive final report that summarizes the results of all study activities.

Based on discussions with the study team, the comprehensive report will then be finalized and sent to the City. The final report will be presented to City leadership by experienced Logic Comp consultants involved in the study, each step of the way.

Activities: One day on-site meeting
Logic Comp develops a comprehensive draft report and leads a draft discussion with the study team. The report document is typically created in Word.
A subsequent final report outlining all processes, data results, and study recommendations is presented to and sent to the City.
Logic Comp conducts training for City staff.
Deliverables
❖ Draft and final report documents. ❖ Survey summary report for participants. ❖ Study conclusion presentations and discussions. ❖ Staff training and education. ❖ Biweekly study team meetings.
Client Role
❖ Review and provide feedback on the draft report and presentation materials. ❖ Coordination of final study presentations and meetings. ❖ Participation in the biweekly study team meeting.

Phase 5: Program Maintenance and Client Support

Change management is a process that goes beyond the initial study. Because our business model is focused on the quality of client relationships and systems, Logic Comp intends to be a resource for our clients long after the completion of the immediate study. Within our proposed study timeline, Logic Comp accounts for the ongoing implementation and maintenance process by incorporating complementary follow-up meetings with our client following the completion of our work.

Activities
Logic Comp continues to assist the City by conducting quarterly follow-up meetings with the City following study implementation. These meetings are critical in ensuring that the systems meet your needs. Logic Comp can provide additional guidance for any unanticipated issues or concerns that may have arisen following the completion of the study.
Deliverables
❖ Four one-hour meetings (via conference call or video) are held quarterly for one year following the completion of the study.

Client Role

- ❖ Preparation for each meeting by outlining issues, questions, and concerns and sending written communications to Logic Comp before the meeting time.

B: REFERENCES

Below is a sampling of professional references for current clients. These studies demonstrate our ability to meet your organization's needs as outlined in the scope of work. We encourage you to contact the organizations listed below, as they can attest to our expertise and client service.

Reference 1

Client Organization: Linn County, IA

Client Contact: Lisa Powell, Human Resources Director

Client Email: Lisa.Powell@linncounty.org

Client Phone: (319) 892-5124

Years of Service: 2010 to Present

Summary: Since 2010, Annette Hoefer has provided services to this county, including reviewing performance management systems, developing an exceptional contribution plan, acting as a member of an oversight team, conducting job audits and job evaluations, and conducting market studies. In 2018, Annette led a classification and compensation study for the County's management jobs, resulting in all recommendations being accepted by the Board of Supervisors. In 2021, 2023, and 2024, Logic Comp completed studies of bargaining unit jobs. Annette continues to advise the County's exceptional contribution committee and on other classification and compensation issues. She is currently providing consulting services for the County's job update process and the review of elected officials' compensation.

Reference 2

Client Organization: Community Transit, WA

Client Contact: Veralee Estes, Human Resources Program Manager

Client Email: Veralee.Estes@commtrans.org

Client Phone: (425) 367-3034

Years of Service: 2014 through Present

Summary: Annette conducts and manages organization-wide compensation studies every 2 to 3 years for this organization, providing ongoing support through job evaluation, training, and special classification and compensation projects. Under Annette's guidance, Logic Compensation recently completed CEO and Leadership surveys in 2024.



Reference 3

Client Organization: City of Durham, NC

Client Contact: Alethea Hardy, Human Resources Manager, Compensation and Benefits

Client Phone: (919) 560-4214

Client Email: Alethea.Hardy@durhamnc.gov

Years of Service: 2017 to Present

Summary: Logic Compensation recently completed a classification and compensation review study of all City classifications, resulting in an enhanced compensation market position and improved overall employee satisfaction. Annette Hoefer managed this recent study in addition to providing consulting services for several studies, including police, fire, engineering, and community services.

Reference 4

Client Organization: City of Tonganoxie, KS

Client Contact: Dan Porter, Assistant City Manager

Client Email: dporter@tonganoxie.org

Client Phone: (913) 845-2620

Years of Service: 2021 through Present

Summary: In 2021, Logic Comp conducted a salary and health benefits survey for this City, resulting in the development and implementation of a new pay plan. We conducted the compensation study again in 2024, recommending updates to the City's pay system.

C: COMPENSATION

The fees to conduct the classification and compensation study will not exceed \$39,500. Fees include all costs except the purchase of published surveys and additional on-site work.

Logic Comp would be pleased to discuss other options if the City desires a reduced study scope and cost. Logic Comp bills monthly based on work completed during the month. The cost will remain firm for 90 days from the date of this proposal.

Additional fees and out-of-pocket expenses will be involved if work is requested beyond that specified in this proposal. We will notify the City and discuss those services as requested. Logic Comp will provide a written estimate of fees before beginning any work.

D: SCHEDULE/TIMELINE

Given the significance of this study, the City must have sufficient time to review and approve Logic Comp's recommendations, as well as communicate effectively with all necessary stakeholders throughout the study. The City plans to start on or around May 7, 2025. Barring any issues, such as a lack of survey participation and unforeseen City delays, the study is expected to be completed by August 29.

Logic Comp has prepared an estimate of the time required to complete each phase by month. We will discuss the details of each phase during Phase 1 and identify specific deadlines for the study at that time. Our project management partnership approach ensures that the City is aware of all documentation and time required to ensure that collectively we meet our agreed-upon deadlines. We are prepared to begin work immediately upon receiving your authorization to proceed.

Phase	Months				
	1	2	3	4	2025-26
1.Study Initiation					
2.Classification					
3.Compensation Survey					
4.Study Recommendations & Report					
5.Program Maintenance & Client Support					

CONCLUSION

Logic Compensation Group is a group of client-focused, senior-level, and highly skilled classification and compensation professionals. Our focus, mission, and expertise are centered on public sector organizations like yours. Logic Comp is pleased to be considered as your compensation and classification resource for this study and years to come.

Thank you for this opportunity to present our services. We look forward to hearing from you soon.

OPPORTUNITY RISING

CLASSIFICATION AND COMPENSATION PROPOSAL FOR

CITY OF FORT ATKINSON

Colleen Rozillis, Partner
Jessie Lenhardt, Senior Manager

Moss Adams LLP
999 Third Avenue, Suite 2800
Seattle, WA 98104
(206) 302-6500



Dear Ms. Houseman:

Thank you for the opportunity to present this proposal to the City of Fort Atkinson (City) for classification and compensation study services. We are confident we offer the team, capabilities, approach, and level of dedicated service that will meet or exceed your expectations for the following reasons:

- **An iterative, collaborative approach to our services.** We do more than just the technical task at hand. We focus on how we can deliver the greatest value to our clients by collaborating with you to help strengthen your ability to serve your community. We share our insights as we conduct our work, validating facts that support findings and testing the practicality of recommendations along the way. We draw on best practices to develop solutions that are practical, achievable, and affordable, and we deliver results in a manner sensitive to the public service environment in which our clients operate.
- **A strong reputation for providing independent and objective advice.** We're independent and deliver accurate, honest assessments in our consulting work. Quality assurance is built into our policies and culture so our work is accurate and timely and will provide significant value to the City.
- **An established firm with extensive resources and expertise.** We're one of the 15 largest accounting and consulting firms in the United States, and we serve our clients with a staff of over 4,800 professionals in more than 30 locations around the country.

April 18, 2025

Rebecca Houseman
City Manager

City of Fort Atkinson
101 N. Main Street
Fort Atkinson, WI 53538

Our promise to you is to make sure you receive the best service Moss Adams is capable of providing.

Sincerely,

Colleen Rozillis
Partner
(206) 302-6795
colleen.rozillis@mossadams.com

Jessie Lenhardt
Senior Manager
(503) 478-2222
jessie.lenhardt@mossadams.com

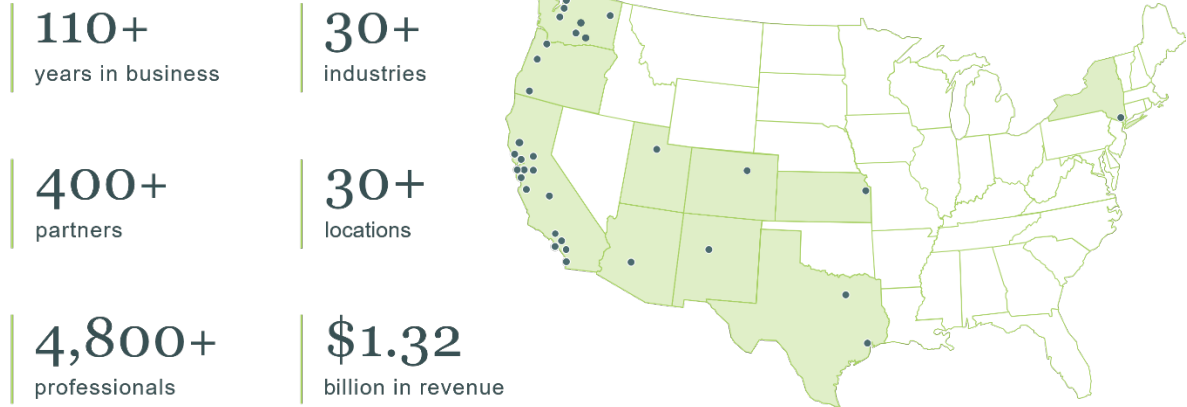
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A. Contractor Statement of Qualifications/Experience

1. FIRM SUMMARY

Firm Background



At Moss Adams, we believe in the power of possible. As a business and personal advisory firm with 4,800 professionals across more than 30 locations, we work with clients to meet the rising challenges and opportunities of tomorrow. Through a full spectrum of accounting, consulting, and wealth management services, we bring the deep industry specialization and unconventional thinking our clients seek.

Since we put down roots in the Pacific Northwest more than 100 years ago, we've steadily expanded to serve clients across the nation and globally. Our full range of services includes accounting (assurance and tax), consulting (IT, strategy & operations, transactions, and specialty), as well as individual and institutional wealth management.

Moss Adams is one of the 15 largest US accounting and consulting firms and a founding member of Praxity, a global alliance of independent accounting firms providing clients with local expertise in the major markets of North America, South America, Europe, and Asia.

Full-Service Capabilities

We offer a full range of services and specializations that span accounting, consulting, and wealth management to suit your specific needs.



Our Government Services Practice

Our Government Services Practice is grounded in the expertise of over 340 Moss Adams professionals who specialize in serving tax-exempt entities, including energy and utility entities, governments, higher education institutions, not-for-profits, tribal and gaming entities, and federal contractors.

We recognize government organizations are accountable to many different constituencies—oversight agencies, audit committees, elected officials, taxpayers—all with different expectations and demands. That’s why we commit significant personnel and resources to this Practice, building technical expertise in all areas of government.



360+
government
entities served

Our experienced partners and senior managers lead engagements for over 360 government entities across the United States including state agencies; cities and counties; public colleges and universities; special purpose governments including ports, utility districts, and transit agencies; public retirement funds; and others.

Our significant government experience means we’re more likely to help you spot potential problems and create effective solutions. You’ll receive more effective services from our specialized professionals who have a deep understanding of the pressures you face like the need for greater efficiency and transparency under tight budget constraints.

Compensation Study Experience

Moss Adams has a proven track record in providing compensation benchmarking services to government agencies, including cities, utilities, and housing authorities. Our expertise helps clients evaluate and align their compensation levels with the market, promoting high employee engagement and performance. As part of our service, we evaluate the benchmarking outcomes to measure consistency with your strategic objectives and approach to compensation. We consider factors such as your unique compensation philosophy, policies, procedures, and desired market position to provide recommendations that support your specific goals. If needed, we can help evaluate, develop, or formalize compensation program administration documentation to ensure consistency in future compensation studies.

We also offer expertise in creating and updating salary structures, such as pay/wage scales. Our approach includes leveraging market benchmark data for all positions or from a representative selection of positions to develop salary structures that meet your needs. We establish or update grades and levels, ensuring sufficient wage growth and tenure within each level. This helps establish a structured and

competitive compensation framework that attracts and retains top talent by creating pay levels for groups and jobs that are competitive externally and equitable internally.

To create customized queries, we work with our clients to collect required information, including position titles/descriptions, operating locations, NAICS code, and organization size (revenue and number of employees). Our comprehensive services are customized to meet each client's specific needs and goals.

Salary Survey Capabilities

Moss Adams has extensive experience in designing, administering, and analyzing surveys that capture critical salary insights. We use the Qualtrics Research Suite platform to design and administer customized, confidential, and user-friendly surveys that streamline data collection and analysis. A testament to our capabilities, we use the same system and process to administer an annual construction salary survey. Throughout the year, Moss Adams works with construction organizations and associations across the industry continuum to collect data on regional and nationwide trends. We bring valuable, industry-specific data and analysis that help companies benchmark their organization against the competition to help make informed business decisions on salary issues.

We work with you to personalize the survey instrument to align with institutional goals and industry best practices, utilizing a mix of quantitative and qualitative methodologies to provide a comprehensive understanding of salary data. We specialize in qualitative data analysis by extracting and analyzing meaningful insights from open-ended survey responses. Our qualitative analysis process includes identifying patterns, trends, and recurring themes that highlight underlying employee concerns, motivations, and opportunities for improvement. Additionally, we provide actionable recommendations based on our findings, helping institutions implement targeted strategies.

Benchmarking Databases

Moss Adams benchmarks cash compensation (salary and bonus) levels for positions against market compensation data obtained from two reliable and robust databases: the Economic Research Institute (ERI) and PayScale. To ensure accuracy, we typically use the average value of ERI and PayScale data in our results, avoiding reliance on any single source of data.

ERI collects data through internally conducted salary surveys and additional salary data is also purchased from salary survey vendors. Data is also gathered through the digitization of Proxy and 10-K data and Freedom of Information Requests in the U.S. PayScale administers, the largest real-time salary survey in the world with more than 250,000 new records on average added every month. The database has more than 55 million salary profiles and updated nightly.

We present the results of the compensation benchmarking using percentiles, comparing current compensation to specific percentiles of the market compensation data. Compensation levels are then defined in relation to the market compensation data percentile.

Our commitment to providing high-quality results helps you optimize your compensation strategies and align them with market standards. We work closely with you to achieve your compensation objectives and provide the necessary support to ensure your success.

Performance Audits

We typically perform dozens of performance audits each year. When conducting performance audits, our team draws from a breadth and depth of experience working with hundreds of governments to identify improvement opportunities. We leverage industry best practices to assess the current environment and identify ways to enhance each organization’s ability to achieve its mission, goals, and strategic initiatives. We consider and evaluate best practices for practical application by our clients to help define management and organizational models, strategies, and tactics to facilitate optimal performance. We also develop performance metrics to enhance accountability and transparency. Performance metrics typically incorporate the identification of efficiency and effectiveness measures, alignment with strategic goals, and development of performance dashboards for use by elected and appointed officials. Results can be utilized to inform strategic plans, policy development, performance audits, and annual internal audit programs.

2. FIRM ORGANIZATION AND PROPOSED STAFF

Firm Ownership and Organization Structure

Moss Adams is organized as a limited liability partnership with more than 400 active partners. Firm business is conducted under the leadership of our chief executive officer, chief operating officer, and chief practice officer; an elected executive committee; regional managing partners; partners in charge of our offices; and industry group leaders. Our national office, located in Seattle, Washington, provides centralized support services for the firm.

Proposed Staff

Your engagement will be overseen by Colleen Rozillis, partner, and Jessie Lenhardt, senior manager. They'll oversee a team composed of a robust combination of quality assurance, analytical expertise, and relevant higher education experience. Emily Hayes, manager, will serve as lead analyst and be supported by Claire Kusinadhuni, staff, as analyst.

We think one of our key differentiators is the staff we assign to our projects. Clients regularly praise our staff on their industry knowledge, professionalism, and practical approach. Our team is selected because their skillsets and experience align with your requirements. All four personnel assigned to this project are full-time Moss Adams employees and will be assigned specific responsibilities and given proper oversight. They are used to working as a team and hit the ground running for every engagement. The personnel roster below identifies our proposed team, their certifications, and roles. Brief resumes follow on the following pages.

Name and Title	Role
Colleen Rozillis, PMP, Partner	Engagement Partner
Jessie Lenhardt, PMP, Senior Manager	Project Manager
Emily Hayes, CIA, Manager	Lead Analyst
Claire Kusinadhuni, Staff	Analyst

Colleen Rozillis, PMP, Partner

Professional Experience

Colleen has over 20 years of experience providing strategic guidance to a diverse range of clients. She helps organizations enhance their operations and culture, improve strategic leadership and planning, reduce risk, and cultivate more effective governance. She works collaboratively with clients to understand their goals and objectives and define organizational and programmatic changes to better equip and position them to achieve those goals.

Colleen leads the firm's Strategy & Operations Consulting Practice, overseeing strategic and management consulting, environmental, social, and governance (ESG) consulting, and public sector internal and performance auditing. She also serves as the consulting leader for the firm's Public Sector, Not-for-Profit, and Tribal industry group, and as the firm's Government National Practice leader.

Her extensive government background spans planning, policy, and financial analysis for local and state agencies in Alaska, Arizona, California, Colorado, Hawaii, Michigan, Montana, Nevada, Ohio, Oregon, Pennsylvania, Texas, Utah, and Washington.

Professional Affiliations

- Immediate Past Chair, Board of Trustees, Humanities Washington
- Member, Society for Corporate Governance
- Member, Project Management Institute
- Member, International City & County Management Association
- Member, Institute of Internal Auditors
- Member, Association of Local Government Auditors

Professional Certifications

- Project Management Professional (PMP)

Education

- MS, public policy and management, Carnegie Mellon University
- BA, English and political science, University of Michigan
- Diversity and Inclusion Certificate, Cornell University

Jessie Lenhardt, PMP, Senior Manager

Professional Experience

Jessie specializes in helping clients in both the public and private sectors reach their organizational development goals. Her experience includes compensation studies, strategic planning, succession planning, process enhancement, evaluations of organizational and operational efficiency, and assessments of structure and staffing. Jessie's approach is grounded in a deep understanding of the dynamics that shape effective organizations, and she brings a unique blend of strategic thinking and operational acumen to each engagement.

Jessie is dedicated to advancing organizational development strategies that align with broader organizational goals. She has a keen ability for identifying areas that need improvement and she excels at implementing targeted interventions that boost efficiency, stimulate innovation, and elevate overall organizational effectiveness. Jessie has garnered an outstanding reputation for her collaborative approach, integrity, and solution-oriented mindset. She consistently drives tangible and sustainable improvements within the organizations she serves.

Jessie has provided consulting work for government agencies in Washington, Oregon, California, Colorado, Idaho, Louisiana, New Mexico, Nevada, Arizona, Wisconsin, and Wyoming.

Professional Affiliations

- Member, Project Management Institute
- Member, International Financial Reporting Standards Foundation
- Member, International City & County Management Association
- Member, Association of Local Government Auditors

Professional Certifications

- Project Management Professional (PMP)
- Fundamentals of Sustainability Accounting Credential

Education

- MA, organizational leadership, Gonzaga University
- BA, art history, University of Oregon

Emily Hayes, CIA, Manager

Professional Experience

Emily has served a variety of clients since joining Moss Adams in 2011 by delivering a diverse array of consulting, internal audit, and in-depth research services. Her passion is for helping clients identify, evaluate, and implement opportunities for improvement by providing strategic, operational, and risk management consulting services. Emily's background in research and information management drives her commitment to connecting clients with meaningful, actionable information as part of every engagement.

Her professional areas of focus include assessing and streamlining business processes for effectiveness and efficiency; delivering data transformation support services; strengthening organizational resilience through business continuity and contingency planning; and supporting organizations through mitigating inherent and emerging risks.

Emily leads the delivery of targeted research and analysis services including the development and administration of surveys; developing and tracking performance measures; financial, operational, and compensation benchmarking; and economic, industry, and market analysis.

Professional Affiliations

- Board of Directors Treasurer, Seafair Charitable Foundation

- Member, Association of Local Government Auditors (ALGA)
- Member, Institute of Internal Auditors (IIA)
- Member, International City and County Manager's Association (ICMA)

Professional Certifications

- Certified Internal Auditor (CIA)

Education

- MS, information management, University of Washington
- BA, international studies, American University

Claire Kasinadhuni, Staff

Professional Experience

Claire has been providing consulting and analytical services since 2020. Her experience includes statistical data analysis, research, literature reviews, and strategy support. She has also been involved in program analysis, the development and implementation of system updates, as well as vulnerability assessments.

Claire has recently provided consulting services to government clients, including the City of Salem, City of Santa Monica, Lane County, Town of Loomis, City of Glendale, the City of Stockton, the Oregon Public Defense Commission, and the Washington State Bar Association.

Professional Certifications

- Certificate of Applied Policy and Governance, Sacramento State Capital Fellows Program

Professional Affiliations

- Member, International City and County Management Association (ICMA)
- Member, Association of Local Government Auditors (ALGA)
- Member, Institute of Internal Auditors (IIA)

Education

- BA, environmental studies, University of Washington
- MA, public administration, University of Washington

3. PROJECT UNDERSTANDING

We understand that the City is seeking a qualified consultant to perform a comprehensive classification and compensation study of the City's compensation system and related components for non-represented positions (approximately 32 different classifications). The assessment will culminate in a final report that will include:

- Recommendations for an updated classification and compensation system

- A market survey comparing current compensation and classification systems to similarly situated entities
- Recommendations for adjustments to job classifications, wage scales, and FLSA exempt/non-exempt status changes if needed
- Strategies to mitigate pay compression issues

We will also provide compensation administration guidance and host training sessions to support ongoing administration of the compensation system. The goal of this study is to ensure that the City remains competitive in attracting and retaining highly qualified individuals for the present and future years while maintaining fiscal responsibility and internal equity across positions.

Methodology

You can expect our approach to be executed through the following four major phases:

1	Start-Up and Management. Project initiation consists of collaborative project planning with City project management, including determining who will be interviewed, what documents will be reviewed, what observations and which peers to include in benchmarking, when and how results will be shared, and how we'll report on project status.
2	Fact Finding. In the second phase, we'll conduct fieldwork, including documentation review, observations, and interviews. We'll obtain the most current information available and insights from City personnel and selected stakeholders. We'll perform benchmarking for established roles and review documents to guide compensation plan administration and performance reviews.
3	Analysis. Based on firsthand input gained during our fieldwork in the previous phase, we'll evaluate the importance, impact, and scope of our observations to develop recommendations. We'll leverage best practices to inform our assessment and conduct peer benchmarking to provide comparative organizational structure data from other government entities on organizational development practices. Based on results of benchmarking we'll work with the City to define its desired market position.
4	Reporting. In the final phase, we'll conclude the project by communicating observations and recommendations through reports and presentations. We'll deliver both draft and final reports, which will include a detailed implementation plan, documents to support ongoing administration and training sessions.

These phases are delineated by tasks described in greater detail on the following pages.

Phase 1	START-UP AND ONGOING MANAGEMENT
<i>We'll begin the project by confirming the City's desired outcomes and potential reference points from which to assess performance.</i>	
Initiate Project	
We'll conduct a kickoff meeting with the City to confirm expectations and discuss overall project scope, logistics, deliverables, timing, and progress reporting requirements. We'll clarify responsibilities of Moss Adams and City personnel, timing of project activities, communication expectations for the project team and City staff, and format of deliverables.	

We will develop a work plan with milestones and a timeline that aligns with the City's timeline, establish an interview list, document request list, and finalize our approach to each phase of the project.

Request Documents and Data

To gain an understanding of the City's current environment we'll prepare a document request list, including but not limited to job descriptions, policies and procedures, performance evaluation templates, review calendars, current compensation data, performance reports, satisfaction surveys, planning documents, or other relevant compensation and operational data. The document request will include a link to our client portal for secure sharing.

We will also collect the required information to create and run customized queries that are built using position titles/descriptions, operating locations, industry (by NAICS code), and organization size (revenue, number of employees).

Perform Project Management

We'll conduct rigorous project management activities for the duration of the engagement. These activities will include providing guidance to the consulting team, coordinating with the project director, working through issues and solving problems, monitoring progress against the approved work plan, and submitting progress reports. At the requested cadence, we will provide the project team with project reports that detail the status of work, upcoming activities, and anticipated deliverable dates.

Provide Quality Assurance

We believe it's important to recognize the need for quality by providing excellent client service and engagement oversight. All deliverables receive a quality assurance review before submittal to the City.

PHASE 1 DELIVERABLES	
	• Final work plan • Interview list • Document and data request • Progress reports

Phase 2	FACT FINDING
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During fact finding, we gather objective input required to assess the City's category of service.

Review Current Documents and Data

We will review current position descriptions and compensation strategy with Human Resources to ensure that it includes the definition of terms and career options for full-time and part-time classifications.

Through documentation review, we'll gain an understanding of your operational and organizational environment and further defining issues and surrounding facts. Specific steps include developing a coordinating document receipt and review and developing questions for use during interviews.

Perform Interviews and Focus Groups

We'll conduct interviews with appropriate employees to gain a full understanding of their roles and responsibilities, as required, by phone, video conference, or face-to-face. Interviews are at the heart of fact finding, and it's through interviews that we'll gain each person's perspective on their current job

description, responsibilities, and changes. Interviews and focus groups will be conducted at multiple levels with representatives from leadership, staff, and other key stakeholders defined within the City.

We'll also conduct a working session with Human Resources to review, understand, and document the current and desired state of the City's compensation philosophy, recruiting and retention metrics, and strategic goals.

Meet with Steering Committee

Our team will meet with the City project team, to discuss and reach a consensus on the following:

- A list of comparators to be used in the study, which may include counties, cities, special districts, private organizations, state agencies, and regional entities.
- A list of benchmark classifications, which will be used to compare the City's positions to those of other organizations.
- Total compensation components of the survey, which will include all elements of compensation, such as base pay, bonuses, classifications, and wage scales.
- The survey instrument, which will be used to collect data from comparable organizations. We conduct compensation benchmarking using two nationally recognized databases, ERI, and Payscale.

Conduct Compensation Benchmarking

We'll create and run customized queries of the two market compensation databases, ERI and PayScale, based on the provided information. Compensation benchmarking and wage scale review will define position levels and group similar positions (based on roles and responsibilities). For any positions that are difficult to identify a marketplace match, we will work with Human Resources to identify a sufficiently similar position or choose a different position to benchmark.

Prepare Preliminary Observations

We'll document our preliminary observations, including commendations and opportunities for improvement. Opportunities for improvement will be organized by area of focus and relate to the organizational development as defined by City leadership and staff.

Present Preliminary Observations

We'll present preliminary observations to the City. The fact-finding phase of work gives the entire project team an opportunity to scan a wide breadth of issues.

The purpose of sharing preliminary observations is to avoid surprises by giving the City a chance to preview findings and verify facts to make sure the basis for each observation is accurate and valid. Observations will form the basis for analysis of opportunities for improvement.

PHASE 2 DELIVERABLES



- Benchmarking results
- Preliminary observations

Phase 3

ANALYSIS

Analysis moves the study process from observations to assessment. This task will determine the significance of opportunities for improvement and how best to address them.

Identify Best Practices Through Benchmarking

Part of our assessment process will draw from comparisons to best practices. We'll utilize the City's approved labor market comparable positions and benchmark classes and provide any additional comparable recommendations for staff to consider.

Some firms perform benchmarking by reviewing collections of articles, statistics, and stagnant data. But at Moss Adams, because we have extensive, firmwide industry connections, we can conduct real-time interviews with other government agencies to obtain firsthand insights from your peers about the challenges they've faced, the measures they've taken to overcome them, and how they've established and maintained their compensation systems. Incorporating this feedback with the rest of our observations enhances our ability to provide innovative, effective, value-added solutions to the City.

Evaluate Wage Scales

Once data has been aggregated, we'll compare wage scales and current compensation levels to benchmark results. We'll also review current compensation for each employee based on recommended wage range for each position. Evaluated data will define compensation levels in relation to the market compensation data percentile. The analysis will identify relevant observations and trends regarding the City's compensation levels and structure based on the benchmarking results and document reviews.

We'll analyze internal relationships between positions to ensure that wage scales are equitable within the City. Our goal is to provide the City with wage scale recommendations that are fair and competitive, and that will help attract and retain the best talent for each position. We'll work closely with the City to ensure that our recommendations align with your goals and budgetary constraints and are thoughtful of downstream cost impacts to the community.

Prepare Draft Report

Based on our analysis, we'll update observations and prepare recommendations. Our work will be packaged in a draft report for review by the City. The draft report will include the necessary level of detail to allow the documents to stand on its own and include the following:

- Executive summary
- Commendations (what is working well)
- Study objectives, scope, and methodology
- Updated job descriptions
- Observations and recommendations compensation and classification results
- Implementation plan for proposed changes

The draft report will include a recommended compensation program with suggested timelines and set of activities for new job analysis/evaluation, new job description creation, and maintenance of the pay classification plan. We'll present recommendations to address policies, guidelines, and procedures for compensation administration to include cost of live adjustments (COLA), employee compensation range penetration and progression, how to evaluate and decide on job reclassification and/or compensation changes outside the normal review process, and recommendations to align individual positions to recommended salary structure.

We'll ensure that the recommended compensation plan and salary range assignment are both externally competitive and internally equitable, taking into consideration the City's budgetary constraints and goals. Our team will work closely with the City project team to ensure that the recommended compensation plan and salary range assignment align with the City's needs and expectations. Our goal is to provide the City with a compensation plan and salary range assignment that is fair, competitive, and sustainable in the long term.

Present Draft Report

Draft observations and recommendations will be presented to the City for final fact validation and assessment of the practicality of recommendations.

PHASE 3 DELIVERABLES



- Draft report
- Draft report presentation

Phase 4

REPORTING

The final phase covers the production of deliverables, including draft and final reports.

Submit Final Report

After incorporating appropriate feedback from City stakeholders, we'll update and finalize the report, including developing and delivering an implementation roadmap to outline a suggested plan to execute the recommendations.

We will also provide resources (such as checklists, templates, and training outlines) to support the continuation of the compensation program at the City.

Present Final Report

We will present the final report to the Finance Committee and City Council.

PHASE 4 DELIVERABLES



- Final report
- Final report presentation

B. References

Hear for yourself the unique experience our clients have in working with our firm. We're confident they'll share stories of how we make their lives easier, help them identify and take advantage of rising opportunities, and guide them to increased success.

City of Santa Monica	
Address	1685 Main Street, Santa Monica, CA 90401
Contact	Susan Cline , <i>Assistant City Manager</i> (310) 458-8411, susan.cline@santamonica.gov
Project Fees	\$190,000

Salt River Pima Maricopa Indian Community Gaming Enterprises	
Address	9800 E Talking Stick Way, Scottsdale, AZ 85256
Contact	Patricia Tate , <i>EVP and CFO</i> (602)-206-2013, patricia.tate@casinoaz.com
Project Fees	\$26,000- \$46,000

San Diego Housing Commission	
Address	1122 Broadway, Suite 300, San Diego, CA 92101
Contact	Lisa Jones , <i>Executive Vice President Strategic Initiatives</i> (619) 578-7696, lisaj@sdhc.org Nancy Sa , <i>Project Manager</i> (619) 578-7569, nancys@sdhc.org
Project Fees	\$16,000

City of Salem	
Address	555 Liberty Street SE, Salem, OR 97301
Contact	Courtney Knox-Busch , <i>Chief Strategy Officer</i> (503) 540-2426, cbusch@cityofsalem.net
Project Fees	\$15,000- \$150,000

C. Compensation

Cost Breakdown

As we hope you’ve experienced firsthand with Moss Adams, it’s about more than the dollars you pay at the end of the day; it’s about value. In addition to a discounted fee structure, working with our forward-thinking, industry-specialized professionals who collaborate closely with you to explore new possibilities is where you will see the true value of continuing to work with Moss Adams.

We are committed to providing fair and commensurate fees based on the experience and level of service described in this proposal. These fees will be billed monthly based on the amount of work completed and on the hourly rates outlined below. If applicable, expenses will be billed separately. Our team is available to travel onsite for in-person work sessions with travel and expenses billed at cost. If incurred, travel and expenses and will not exceed 5% of the total project fees.

Service Description	Fee
Phase 1: Start-Up and Ongoing Management	\$4,300
Phase 2: Fact Finding	\$28,650
Phase 3: Analysis	\$13,800
Phase 4: Reporting	\$17,700
Travel Costs: Not to exceed 5% of subtotal project fees	\$3,200
Total Not to Exceed	\$67,650

Hourly Rates

Our standard hourly rates range from \$265 to \$655, however, we have provided discounted rates for the City, which includes all overhead rates.

Staff Level	Hourly Rate
Partner	\$400
Senior Manager	\$350
Manager	\$300
Senior	\$250
Staff	\$200

D. Schedule/Timeline

Projects of this nature typically take approximately four months to complete from project start-up to delivery of the final report. The overall timing will depend on the availability of key City personnel and the general timing of this work in relation to other relevant work impacting the City. The duration of the phases is depicted below.

Should we be awarded this work, we are available to begin work shortly after contract execution, upon May 7, 2025 as requested. We will be able to complete the work by August 29, 2025.

Phase	May	June	July	Aug.
1. Start-Up and Ongoing Management				
2. Fact Finding				
3. Analysis				
4. Reporting				

Exceptions

This proposal is contingent upon completion of the Moss Adams new client acceptance process and execution of a mutually agreeable contract.

With regard to the terms and conditions contained in the RFP, Moss Adams suggests: (i) clarifying that the insurance requirements will need to comport with Moss Adams' existing policies (§X(A)); and (ii) addressing mutual limitation of liability and no third party beneficiaries in the resulting contract (new).

We have successfully signed services agreements with thousands of clients and we commit to working in good faith to successfully negotiate a mutually agreeable contract on a timely basis should we be awarded this work.

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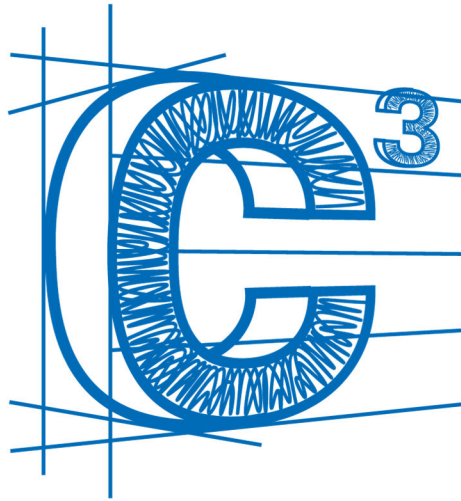
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COMPENSATION BLUEPRINT

COMPREHENSIVE | COMPLIANT | COMPETITIVE

A DIVISION OF THE ARNOLD GROUP

Client: CITY OF FORT ATKINSON, WISCONSIN

Project: CLASSIFICATION AND COMPENSATION STUDY

Firm: THE ARNOLD GROUP – C3 COMPENSATION DIVISION

Senior Architect(s): PHILLIP HAYES, VICE PRESIDENT
HEATHER POORMAN, SR. HR BUSINESS PARTNER

Project Architect(s):
1) REBECCA HOUSEMAN, CITY MANAGER
2) OTHER DESIGNATED CITY OF FORT ATKINSON TEAM MEMBERS

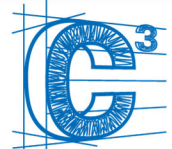
Proposal Date: MARCH 19, 2025

RFP # N / A

Date: APRIL 14, 2025

Version # N / A

Revision # N / A





April 14, 2025

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

Re: Classification and Compensation Study RFP

Dear Rebecca:

Thank you for your interest in a Classification and Compensation Study for the City of Fort Atkinson (**THE CITY**). It is clear that the City of Fort Atkinson is committed to taking the necessary steps to ensure its compensation plan is fair, equitable, and, most importantly, competitive. In response, we have prepared a technical and cost proposal outlining how The Arnold Group (**TAG**) can assist THE CITY in achieving its compensation goals and objectives.

The Arnold Group Snapshot:

- Firm Size: 30 full-time internal employees and over 3,000 temporary employees
- Longevity: Incorporated in Wichita, KS in 1979
- Structure: Privately owned, family and women-owned business
- Relevant Experience: Public Sector: U.S. Cities and Counties
- Memberships: SHRM, Rotary, NFIB, Chambers of Commerce

We thoroughly enjoyed learning about the City of Fort Atkinson and are excited about the opportunity to work with you if selected. Should it be helpful, we are happy to provide a demonstration of the various components of the proposal and answer any questions or concerns you may have.

Once again, thank you for considering us, and we look forward to the possibility of collaborating with you.

Respectfully,

Phillip M. Hayes, Vice President
316.619.7864
phayes@arnoldgrouphr.com

Heather Poorman, Sr. HR Business Partner
316.214.7784
hpoorman@arnoldgrouphr.com

The Arnold Group
C3 Compensation Blueprint Division
530 South Topeka
Wichita, KS 67202
800.794.6098
HRC-Tag@ArnoldGroupHR.com

ABOUT THE ARNOLD GROUP (TAG)

A Vision Takes Flight: After 15 years of experience with large, national staffing corporations, George Arnold and his wife, Marion, decided it was time for a new chapter. In 1979, they launched The Arnold Group (TAG) as an Olsten Staffing Services franchise in Wichita, Kansas. Their single office soon expanded into multiple locations across south-central Kansas. By 2000, the Arnolds had gained their independence and rebranded the company as The Arnold Group.

Our Founding Principles: George and Marion’s vision was clear: to deliver top-notch HR, recruiting and staffing solutions tailored to the Wichita business community and beyond. Their approach was grounded in their experience, entrepreneurial spirit, and a core belief in “putting the customers first and developing long-term relationships with them.”

A Commitment to Excellence: Over the years, our commitment to these founding principles, along with significant investments in people and technology, has established The Arnold Group as one of the Midwest’s most respected recruiting and HR firms. Unlike large national companies, we are an independent, third-generation, family-owned business. Our focus on integrity, quality, and client-first relationships sets us apart.

Our Legacy and Future: With over 45 years of service, we’ve built a solid reputation for superior service and unwavering commitment to our clients and associates. Our Mission and Values reflect our dedication to maintaining these high standards, evolving from a singular service to a comprehensive provider of workforce solutions.

Recruiting and Staffing: We specialize in sourcing and evaluating individuals for employment with a keen focus on skill level, talent, and motivation. Our team is dedicated to matching the right people with the right roles, ensuring a perfect fit for both the candidates and the organizations they join. By understanding the unique needs of our clients and the strengths of our candidates, we deliver effective staffing solutions that drive success and growth.

Executive Search and Talent Acquisition: Our executive search and talent acquisition services are designed to align highly qualified candidates with reputable companies. We utilize a meticulous process to identify and engage top-tier talent for leadership and key positions. By leveraging our extensive network and industry expertise, we help companies find leaders who will drive strategic initiatives and contribute to long-term success.

Workforce Solutions: We offer customized, strategic, and innovative human resource solutions tailored to address the specific challenges faced by our clients. Our approach involves assessing the unique needs of each organization and providing comprehensive solutions that enhance efficiency, productivity, and overall workforce effectiveness. From strategic planning to implementation, we ensure our solutions are designed to meet the evolving demands of the modern workforce.

Our Mission:

TAG’s purpose and passion is to create a valuable impact by providing solutions for recruiting and retention challenges.

Our Values:

- Building Meaningful Relationships
- Positive Attitude
- Intuitive, Transparent Communication
- Passion for Making an Impact
- Integrity in Everything

PROPOSED SOLUTIONS

When working with the City of Fort Atkinson (**THE CITY**), The Arnold Group is committed to delivering a successful project of impactful deliverables with the highest quality of professional service throughout this endeavor. We bring a lot to the table—experience, resources, fresh ideas, a strong focus on your needs, and emphasis delivering a **Comprehensive**, **Competitive**, and **Compliant** solution tailored specifically to your organization.

Our goal with this study is to design and deliver a **C3 Compensation Blueprint** and related tools that accurately reflect job roles and responsibilities, builds a flexible organizational system and structure to support THE CITY’s growth, and aligns with its bigger goals and strategies. To help meet THE CITY’s needs, The Arnold Group is providing the following background and technical details for your review.

WHY THE ARNOLD GROUP?

Overall, we develop a **C3 Compensation Blueprint** specifically *for and with you* knowing that it can and will impact every stage of the employment lifecycle for your organization, from attracting the right people to keeping them happy and engaged, all while aligning with business goals and legal requirements:

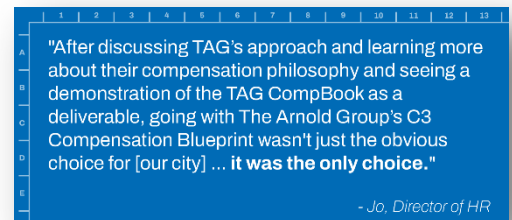
- **Attracting Talent:** A well-structured compensation system helps an organization stay competitive in the job market. It ensures salaries, benefits, etc. are attractive, which can draw in top talent. Job seekers often evaluate compensation as one of the key factors when considering a position.
- **Onboarding:** When new employees join the organization, having a clear and fair compensation structure helps set expectations right from the start. It establishes trust and transparency, making the transition smoother and promoting a sense of security in their role.
- **Performance & Development:** A solid compensation system ties employee performance to rewards. Whether through raises, bonuses, or promotions, it motivates employees to perform at their best and offers clear pathways for career growth. It also enables the company to reward and retain high performers.
- **Employee Retention:** Competitive and fair compensation ensures employees feel valued, which is a huge factor in their decision to stay with the organization long-term. Regular reviews and adjustments based on market trends or performance can reduce turnover and the costs associated with hiring and training new staff.
- **Engagement & Satisfaction:** A compensation system shows employees that their contributions are recognized and compensated appropriately. This boosts morale, engagement, and overall job satisfaction, leading to a more productive and positive work environment.
- **Compliance & Risk Management:** A comprehensive compensation system helps ensure the organization complies with laws and regulations, like minimum wage, overtime pay, and equity standards. It also reduces the risk of legal issues, like wage disputes, by clearly defining pay structures and policies.



Really, What Makes TAG Unique and Stand Apart?

We are an independent, third-generation, family-owned and operated company committed to integrity, quality, and building lasting business relationships. Our focus is always on putting the client first and delivering practical, effective solutions at every level.

- **We understand the challenges you face:**
 - Having worked both with and within the public sector, we truly understand your perspective and approach the process from your viewpoint.
 - We recognize the delicate balance between managing employees (heartstrings), budget constraints (purse strings), and the political realities that affect recruitment, retention, and morale—while working with finite taxpayer funding.
 - We provide tailored solutions for unique challenges, particularly for first responders and other hard-to-fill or specialized roles such as:
 - Law Enforcement: Sworn Professionals, Corrections Staff, and Communications/Dispatch
 - Fire & EMS
 - Public Works & Utilities
 - Specialized: IT & Legal/Attorney
- **We offer a unique benefit with a long-term return on investment (ROI):**
 - City of Fort Atkinson will receive much more than just a static report or timestamped recommendations for change.
 - All the compensation tools utilized during the project will be provided to THE CITY at no additional cost, enabling THE CITY to manage its compensation administration independently moving forward.
 - The **C3 Compensation Blueprint** has a variety of resources and financial planning tools to assist with budget forecasting. With just a few simple steps, you can easily run financial analyses and enhancements, including:
 - Pay Compression Analysis
 - Pay Equity Audits and Employee Pay Alignment
 - Perform Pay Scale Maintenance for COLA adjustments and resulting Grade & Step impacts
- **Eliminate the need for costly, formal studies every 5-10 years:**
 - City of Fort Atkinson will own its **C3 Compensation Blueprint**, a dynamic, responsive, and user-friendly CompBook that allows full control over its compensation strategy.
 - TAG remains just a phone call or email away for ongoing support and assistance.
- We emphasize a balanced approach, ensuring fairness in internal equity, competitiveness with external markets, and compliance mitigation.



OUR C3 COMP PROJECT ARCHITECTS

Phillip M Hayes, Vice President



Phil is one of the principal owners and a driving force at TAG. He works closely with clients to enhance their HR programs by delivering customized workforce solutions, most notably having developed the **C3 Compensation Blueprint**. With a background in HR Management and a Master's in Management Information Systems, combined with over 25 years of experience, Phil has been honored as both Wichita and Kansas HR Professional of the Year.

Phil stays active in shaping state HR policies, especially in unemployment matters. He's been appointed to several key boards and councils, including the Kansas Employment Security Board of Review and the Kansas Unemployment Compensation Modernization & Improvement Council. Recently, he received the Father Becker Award at the 2023 UWC National Unemployment Insurance Conference for his significant contributions to unemployment insurance research and impact in Kansas.

Heather Poorman, Senior HR Business Partner



Heather is our trusted HR advisor, working closely with clients to address workforce challenges with efficiency. She provides expert guidance that helps clients save time, reduce legal costs, ensure compliance, and minimize risks. With a Business Management degree, a Master's in Conflict Resolution & Dispute Management, a Mini Master's in Public Administration, and over 25 years of experience in HR across both public and private sectors, Heather brings a deep well of knowledge and expertise to every project.

Hayley Howe, HR Business Partner



Hayley is a versatile professional, serving as a PRN dental hygienist while also playing a key role as an HR Business Partner. In her HR role, she assists with compensation projects and helps craft clear, effective job descriptions to ensure alignment with organizational goals. With her unique blend of healthcare experience and HR expertise, Hayley brings a well-rounded perspective to her work. Her ability to seamlessly balance these roles makes her an invaluable asset to any team.

Amy Hayes, HR Business Partner



Amy is an essential part of our Workforce Solutions Team, providing expert support and advice on various processes with great attention to detail. With years of experience, Amy excels at streamlining payroll operations and analyzing workforce data to offer insightful, data-driven recommendations that enhance results for our clients.

Brett Staats, HR Business Partner



Brett is a key member of our Workforce Solutions Team, ensuring projects run smoothly and accurately. With a strong background in accounting, payroll, and data management, he brings a financial lens to workforce operations, helping businesses stay compliant and efficient while keeping costs in check.

RECENT PROJECT EXPERIENCE

- Allen County Community College – KS
- Bergkamp, Inc. – KS
- Berry Companies – KS
- [City of Andover, KS](#)
- City of Ark City, KS
- [City El Dorado, KS](#)
- [City of Emporia, KS](#)
- City of McPherson, KS
- City of St. Mary's, KS
- City of Winfield, KS
- Crawford County, KS
- Dickinson County, KS
- Ellis County, KS
- Finney County Committee on Aging – KS
- Finney County, KS
- Geary County, KS
- GLMV Architecture – KS
- Heartspring-KS
- Kan-Okla Networks-KS & OK
- County Community College– KS
- Lincoln County, KS
- Miami County, KS
- Midwest Public Risk – MO
- Montgomery County, KS
- Neosho County, KS
- Ottawa County, KS
- Pottawatomie County, KS
- Professional Body Works – KS
- Reno County, KS
- Riley County Police Department – KS
- Saline County, KS
- Seward County, KS
- South Central Kansas Area Agency on Aging – KS
- USD 443, Dodge City Public School District – KS
- USD 457, Garden City Public School District - KS
- Vermillion, Inc. – KS
- West Texas Rehabilitation Center – TX
- WSU Tech - Wichita State University – KS

CLIENT REFERENCES

We are proud to have worked with a diverse group of clients, each benefiting from our tailored compensation solutions and expertise. Below are three recent examples of our successful collaborations:

1. [City of El Dorado, KS](#)
David Dillner, City Manager
316-321-9100 | ddillner@eldoks.com
2. [City of Andover, KS](#)
Jennifer McCausland, City Administrator
316-733-1303, ext. 412 | jmccausland@andoverks.com
3. [City of Emporia, KS](#)
Trey Cocking, City Manager
620-343-4250 | tcocking@emporiaks.gov

Additional client references available upon request.

SCOPE OF WORK / METHODOLOGY

The City of Fort Atkinson has recognized the need to complete a classification and compensation study resulting in a comprehensive, competitive and compliant compensation strategy and plan. The Arnold Group understands that compensation is a key factor in how effectively a business strategy is executed. A well-designed compensation system not only motivates employees but also helps control costs, ensures both internal and external equity, and allocates financial resources efficiently.

Our approach focuses on three core elements of compensation: employees, organizational capabilities, and core competencies. By examining these areas in depth, we lay the groundwork for how we begin the compensation review process, ensuring that all aspects are aligned at the conclusion of the project.

Job Descriptions

Job descriptions are a crucial foundational component for the success of this project and influence all phases of the employment lifecycle. All employers, regardless of size, should have accurate and well-written job descriptions for every position within the organization to:

- Support the creation of job advertisements and the development of job-related selection tests and evaluations
- Assist in analyzing staffing needs and managing compensation budgets

- Identify essential duties as required by the Americans w/ Disabilities Act (ADA) and help accommodate employees w/ disabilities
- Specify physical requirements, such as the ability to lift and/or move 25 pounds
- Help protect the organization from discrimination claims in hiring practices by ensuring consistent application of job duties across all roles, without bias based on gender, race, religion, or nationality
- Support performance evaluations based on job requirements
- Align job responsibilities with appropriate compensation levels
- Assist in determining exempt/non-exempt status in compliance with the Fair Labor Standards Act (FLSA)

Project Note

- Job Descriptions provided by the City of Fort Atkinson will be utilized for this project
- If no job descriptions exist, TAG can create them for you for an additional cost (included in the cost section of this proposal)

Project Approach

TAG applies the following compensation plan fundamentals to every new and ongoing **C3 Compensation Blueprint** project:

- **Market competitiveness:** Research market trends and salary benchmarks to set competitive pay.
- **Goal alignment:** Ensure that compensation plans align with company values and goals.
- **Pay mix structure:** Determine pay grades and salary ranges based on market data and internal analysis.
- **Transparency and communication:** Involve employees in the planning process and communicate the plan clearly.
- **Regular reviews and updates:** Stay informed about market trends and salary benchmarks to ensure pay structures remain relevant.
- **Data-driven decision-making:** Base compensation decisions on data and objective metrics.

The Arnold Group's approach is consultative, outlined as follows:

Project Orientation

At the start of each project, we develop a communication plan to ensure TAG can provide regular progress updates and address any issues that may cause delays or challenges. TAG coordinates meetings, manages data sharing, and ensures the project follows the established work plan to meet the deliverables within the agreed-upon scope and timeline.

We customize each project to align with the unique needs, structure, and culture of your organization, while emphasizing collaboration, communication, and transparency. We create a clear work plan with defined deliverables to guide the process and project success.

Kickoff call with your organization will include:

- Providing a list of required documents and data to start the project
- Discussing project expectations and milestones
- Developing a communication plan
- Scheduling initial meetings

Clearly Define and Understand the Need

Before any business challenge can be fully addressed, it is crucial to understand how the issue is affecting each stakeholder—and how any potential solutions could impact them as well. We believe in engaging directly with management and administration to identify challenges and concerns with the current system, as well as future needs, so we can develop applicable recommendations that effectively address those needs.

Understand Your Business Environment

This involves assessing both internal and external factors affecting your organization. Analyze your organization within the broader business context, including comparisons to competitors in both the private and public sectors. Engage with stakeholders to gather feedback and review progress on milestones and outcomes.

TAG will meet with organizational leaders, department directors, and managers to:

- Review your organization's current org charts, budgets, personnel policies, comp and benefits system, and your compensation philosophy/strategy.
- Collect information from each department, including unique position responsibilities/requirements, strengths and weaknesses of the current system, and any challenges related to employee recruitment and retention.
- Review any provided documents and data for clarifications and thorough understanding.
- Identify any potential future needs.

Make Change Sustainable

To ensure lasting change, it is essential to continue evaluating its effectiveness; therefore, we recommend Investment Option 1, which includes 3 years of support following the delivery of your **C3 Compensation Blueprint** CompBook and related tools.

- We focus on communication that builds transparency, encourages involvement, and supports long-term success.

Classification, Salary Survey & Compensation Plan

Compensation plays a vital role in human resources strategy, helping to attract, retain, and motivate employees. Because compensation is both visible and important to employees, a well-designed compensation program that aligns with strategic goals not only helps employees understand these goals but also motivates them to achieve them. Additionally, when compensation is clearly linked to other HR efforts—such as performance management, recruiting, and career development—it ensures these initiatives are better understood and more effective.

Formal pay scales offer several benefits, including helping control costs, setting minimum starting wages for positions, and providing a legally defensible position against potential pay discrimination complaints. Organizations with established pay scales and a formal compensation policy are less likely to face legal challenges in this area.

The Arnold Group takes pride in offering tailored compensation solutions for our clients. TAG evaluates market survey data, job documentation, and the overall compensation plan by analyzing pay ranges, grades, differentials, overtime practices, pay progression, and other aspects of the pay structure.

The Arnold Group's Recommendations:

- **Conduct a Point Factor Analysis (PFA)** of current job descriptions to objectively assess internal and external wage equity. The PFA process evaluates compensable factors like knowledge, supervisory control, complexity, scope, physical demands, and work environment to distinguish jobs and determine their value across the organization.
 - Internal equity refers to how jobs are valued relative to each other within the organization.
 - External equity is achieved by staying informed on market trends through wage and salary surveys and strategically adjusting pay ranges where necessary.
- **Establish pay grades and clearly define non-exempt, exempt, and executive pay grades:**
 - Grades 10-15: Operations/Industrial/Clerical/Office (generally non-exempt)
 - Grades 30-35: Management/Administrative/Professional/Creative/Sales (generally exempt)
 - Grades 40-42: Executive (exempt)
- **Establish benchmark salaries** for the lowest-paying non-exempt and exempt positions to use as the foundation for building pay scales aligned with your goals.
 - Calculate pay spread within each grade to determine minimums, mid-points and maximums, allowing for appropriate growth while meeting organization goals and financial constraints.
 - Define and build pay scales that objectively balance the organizational purse strings with the employee heart and head strings (employee lifecycle).
 - Ensure pay range minimums comply with the Fair Labor Standards Act (FLSA) requirements.
 - New hires typically start at the minimum pay rate due to limited experience. Ideally, the minimum should be high enough to attract qualified candidates.
 - Identify “green-circled” employees (those earning below the pay grade minimum) and “red-circled” employees (those earning above the pay grade maximum) so THE CITY can plan appropriate communication and actions.
- **Analyze overall employee impact** in consideration of each employee's full employment journey.
 - TAG's approaches each project with the understanding that every organization faces unique challenges to include specific position pain points. We offer in-depth analysis and tailored solutions that address both immediate issues and provide long-term benefits. Our data-driven method helps organizations see the direct impact of their investment and make adjustments to optimize results.
- **Generate alternative implementation options** for consideration in the adoption of the compensation plan, which will include addressing any pay compression.
 - This process will involve identifying different strategies for implementing the new compensation structure to ensure a smooth transition while meeting current and ongoing organizational goals.
 - Each option is designed to achieve a balance between equity, budget constraints, and the need to retain and motivate talent.
 - Options may include phased implementation plans, across-the-board adjustments, targeted pay increases, or adjustments to specific pay grades.
 - Options will consider both short-term adjustments to alleviate immediate compression issues and long-term solutions to prevent further pay compression from occurring.
 - The final recommendation will provide a clear roadmap ensuring the adopted compensation plan is both fair and sustainable.

- We will partner with you to develop and execute a tailored communication plan to ensure the compensation study is communicated effectively, helping to foster understanding, trust, and alignment across all levels of your organization.
- **Develop or revise the organization's compensation and wage policy** to establish clear, comprehensive guidelines for key aspects of compensation management, including promotions, transfers, job analysis, job evaluation, job classification, and the schedule for wage scale reviews and methods of evaluation.
 - Provides the organization with a structured, fair, and transparent compensation system that supports both employee satisfaction and organizational goals.

TAG's Bottom-Up Compensation Project Approach Summarized:



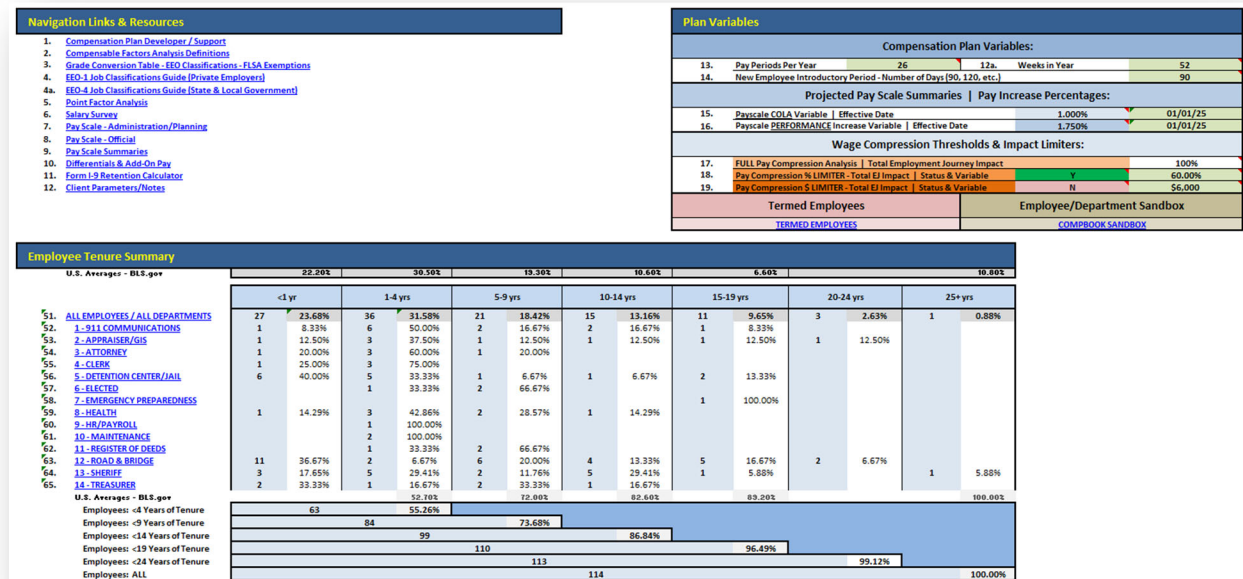
PROJECT SCHEDULE

At The Arnold Group, we take pride in our ability to meet multiple time commitments while delivering exceptional customer service. We assign dedicated staff to your project, ensuring your organization's needs are our top priority. For your project, we will create a customized timeline that aligns with your priorities.

Typically, our project completion timeframe is **8-12 weeks**, assuming we receive all required information and documents from the City of Fort Atkinson in a timely manner. As long as all the necessary materials are provided promptly, we are confident we can complete the project on time and within budget.

WORK SAMPLES | TAG COMPBOOK DASHBOARD

Following is screenshot from TAG's **C3 Compensation Blueprint** CompBook Dashboard:



We are happy to provide you and your team a **demonstration of TAG's C3 Compensation Blueprint**, the primary tool that the City of Fort Atkinson will receive upon completion of this project.

LEGAL

The Arnold Group is not aware of any current, pending, or potential disciplinary actions, complaints, or similar proceedings, including claims in arbitration, mediation, or litigation, against the firm or any of its partners or associates. The Arnold Group is also unaware of any actual or potential conflicts of interest with the City of Fort Atkinson.

We will adhere to the requirement to maintain strict confidentiality and data ownership regarding all aspects of this project. Additionally, The Arnold Group will not enter into any partnerships with subcontractors for this project.

CERTIFICATE OF INSURANCE

The Arnold Group will provide a Certificate of Insurance that meets your specifications upon request.

TRAVEL COSTS

Should any unforeseen circumstances arise that require travel outside the expected scope, we will treat the travel cost as a pass-through expense based on office location and distance. These costs will be communicated and require your approval in advance, ensuring transparency and cost-effectiveness throughout the project lifecycle.

THANK YOU

Thank you for considering The Arnold Group as your partner in shaping a modern, more competitive compensation strategy. Our team and services are well-aligned with THE CITY's goals, and we would be honored to work with the City of Fort Atkinson and earn your trust through this RFP submission.

We look forward to collaborating with you and advancing the next steps in this process. Please contact us to schedule a meeting or request any additional information.

COST SUMMARY

The Arnold Group's rate structure for the City of Fort Atkinson's project is determined by the estimated time and expertise required to complete the project.

Comprehensive Classification and Compensation Study

Investment Option 1: \$25,960

Investment Option 2: \$22,465

- **Primary project variables**
 - 100 employees | 14 departments | 30+ unique positions
- **Review organizational documents**
 - Review of organizational charts and personnel policies/rules
 - Review, clarification, interviews, and updates for position descriptions
- **Review and create a recommended classification structure for all City of Fort Atkinson positions**
 - Build a consistent, consolidated structure that enables department/division/organization-wide analysis
- **Conduct a Point Factor Analysis (PFA) of compensable factors for current job descriptions**
 - Knowledge, guidelines, and complexity
 - Supervisory control, job scope and impact
 - Personal contacts and purpose of contacts
 - Physical demands and work environment
- **Establish comprehensive pay scales for the organization**
 - Establish pay grades and differentiate between non-exempt, exempt, and executive pay grades
 - Establish benchmark salaries for base job grades
 - Recommend grade progression and pay spreads for each pay grade
 - Recommend pay differentials as well as position considerations for mixed market multipliers
 - Create pay scale summaries/guidelines to assist HR with new employee hiring rates based on relevant and defined criteria
 - Ensure pay range minimums comply with FLSA requirements
- **Conduct and present employee compensation analysis with recommendations**
 - Final written report and presentation of the plan to relevant parties
 - Methodologies, findings, conclusions, and recommendations
- **Provide the following deliverables (digital/electronic copies):**
 - Finalized **C3 Compensation Blueprint** CompBook with training
 - Workforce Planning Dashboard
 - Workforce summaries (gender, tenure, age, race/ethnicity)
 - Organizational/departmental financial summaries
 - Compensable factors, Point Factor Analysis (PFA) summary, and job grade conversion table
 - Formal pay scales
 - Employee pay/wage analysis
 - Employee compa-ratio and wage penetration impact
 - Current pay alignment
 - Green/red-circled employee analysis
 - Pay equity and employee pay compression analysis
 - Labor cost/budget analysis and projections
 - Written wage and salary administration policy and related forms:
 - Revise or develop written compensation and wage policy/objectives
 - Methodology and procedures
 - Pay scale maintenance related to COLA and Grade & Step adjustments
 - Guidance regarding market pay adjustments, promotions, demotions, transfers, reclassifications, etc.
 - Payroll change and salary adjustment forms

Optional: Job Description Review, Update and Creation

Optional Investment: \$7,088

INVESTMENT OPTION SUMMARIES

Investment Option 1:	Not to exceed \$25,960
Payment Terms: All Payments Due within 3 Years	
• Project kickoff: 40% due	\$10,384
• Year 2: 30% due	\$7,788
• Year 3: 30% due	\$7,778
<u>Three Years Annual Support Included</u>	\$0
• TAG offers follow up, maintenance, support and analysis for three (3) years following the CompBook delivery date ○ Point Factor Analysis (PFA) for new and/or updated position descriptions ○ Update salary survey data points	

Investment Option 2:	Not to exceed \$22,465
Payment Terms: All Payments Due within 1 Year	
• Project kickoff: 50% due	\$11,232
• Project completion: 50% due	\$11,232
<u>One-Year Annual Support Included</u>	\$0
• TAG offers follow up, maintenance, support and analysis for one (1) year following the CompBook delivery date ○ Point Factor Analysis (PFA) review/calculation for new and/or updated position descriptions ○ Update salary survey data points • <i>Subsequent annual support:</i> \$2,496/per year	

Optional Investment: Job Description Review, Update and Creation	Not to exceed \$7,088
Payment Terms: Payment Due Upon Delivery of Job Descriptions	
• Develop clear, detailed, and updated job descriptions that accurately reflect each role’s responsibilities, qualifications, and expectations within the organization. • Ensure consistency across all job descriptions by utilizing industry best practices and standardized formats that enhance readability and clarity. • Incorporate relevant competencies, skills, certifications and key performance indicators (KPIs) to better align job descriptions with organizational goals and employee performance expectations. • Review and revise existing job descriptions to ensure they are current, reflecting any changes in responsibilities, qualifications, or organizational structure. • Provide a comprehensive set of job descriptions that will serve as foundational tools for recruitment, performance evaluations, and career development planning.	

Proposal for: Classification and Compensation Study

Prepared for: City of Fort Atkinson



April 18, 2025



Presented by:
Yeo & Yeo HR Advisory Solutions (Amy Cell Talent)

Thank you for the opportunity to submit this proposal to assist the City of Fort Atkinson with their Classification and Compensation Study. As you read through this proposal, you will find our firm's extensive experience with Classification and Compensation Studies makes us a great partner for the City of Atkinson. We bring the following attributes to our partnership and project success:

Human Resources Expertise - Our high caliber team is experienced in all areas of human resources including compensation, benefits, payroll, compliance, recruiting, union relations, employee engagement, leadership development, succession planning, performance management, training, and organization development. We are passionate about attracting, retaining and developing talent, and understand the cultural and structural aspects of high performing organizations.

Municipal Experience - We have partnered with many municipalities and have provided a variety of HR services. We understand the very unique challenges facing municipalities.

Our Team - We have a team of 24 highly qualified and diverse human resources and talent professionals.

Passion for Community Service - Our team has worked for government, economic development and community development organizations. We are passionate about supporting municipal communities!

We have supported hundreds of employers, communities and job seekers with customized HR and recruiting services. Our team of seasoned professionals brings expertise and knowledge in municipal recruiting, human resources, economic development, marketing and project management. We would be honored to work with the City of Fort Atkinson.

In response to the City of Fort Atkinson's Request for Proposals for a Classification and Compensation Study, we are pleased to submit our proposal. We have read the solicitation, understand its contents, and agree to the outlined terms and conditions. All conditions contained in the attached proposal are valid for at least 90 days from the date of the proposal opening, as stated in the RFP.

Please feel free to contact me with any questions. Thank you very much for the opportunity to share our interest in this engagement.

Best regards,



Amy Cell
President Yeo & Yeo HR Solutions
734-657-0370
amy.cell@yeoandyeo.com

215 W. Michigan Ave., Ypsilanti, MI 48197
Phone: 734-657-0370 E-Mail: amy.cell@yeoandyeo.com

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A. Qualifications/Experience

About Our Firm

Yeo & Yeo HR Advisory Solutions delivers comprehensive recruiting, operations, training, and HR planning services to businesses, nonprofits, municipalities, and individuals across the U.S. We believe that the success of any organization begins with its people. Guided by this understanding and a shared purpose with our clients, we provide guidance to help you navigate the dynamic world of HR. Whether addressing immediate needs, planning for the future, or tackling unforeseen challenges, our team is committed to empowering you to thrive.

Our team consists of twenty four talent professionals with deep expertise and knowledge in the areas of human resources, Industrial/Organizational psychology, project management, startups, communications, and business strategy. We are highly educated and diverse - half our team has master's degrees in business, human resources or a related field, and we come from a variety of backgrounds, national origins, and perspectives. Our team is passionate about recruiting, training, compensation, employee handbooks and more.

Established on January 1, 2025, Yeo & Yeo HR Advisory Solutions builds on the legacy of Amy Cell Talent. Led by Amy Cell, our team brings a wealth of experience and a track record of excellence, underscored by accolades such as the Ann Arbor Spark Fasttrack Award and inclusion among Michigan's Small Business 50 Companies to Watch. Dedicated to meeting clients' evolving needs, Yeo & Yeo provides solutions through its now five interconnected businesses: Yeo & Yeo HR Advisory Solutions (Amy Cell Talent), Yeo & Yeo CPAs & Advisors, Yeo & Yeo Technology, Yeo & Yeo Medical Billing & Consulting, and Yeo & Yeo Wealth Management. Learn more about Yeo & Yeo by visiting yeoandyeo.com. Together, we can foster greater collaboration and knowledge sharing, enhancing our collective expertise.

Firm's Capabilities and Experience

As part of every compensation study we have performed, we engage in various levels of job evaluation, job analysis, job classification, and assessing market competitive compensation based on the client's project scope and needs. We have experience with this type of work for a variety of public and private organizations of varying size, industry, and job classifications. We have bench strength for project success and our firm understands the City of Fort Atkinson's RFP and appreciates the level of background detail provided by the City in the Scope of Services. We take pride in our "superpowers" of integrity, overcommunication, customer focus, teamwork and initiative and apply them to every client partnership.

Key Personnel

Our experienced and high-caliber team will include:

Amy Cell, President

Amy will be assigned project tasks and will oversee the engagement, analysis of the performance management system, and present findings. Amy has been working in compensation planning for 20 years. She has led projects that have included job analysis, market research, compensation structure development, executive compensation recommendations, compensation communications and the development of innovative approaches to align compensation with behaviors. She has worked on compensation projects in the following industries: Non-profit, municipal, manufacturing, healthcare, technology, hospitality. Her largest project included 153 unique positions, a market study, development of a new structure and communication plan.

Sonja Parkinson, Vice President

Sonja will be assigned project tasks and will have project management responsibilities, will be a department liaison, run compensation reports, and lead the final report writing. Sonja has worked in HR and compensation planning for the last 10 years. She has led a wide range of compensation projects, including designing executive compensation frameworks, job analysis, and position market pricing. She has also designed and managed the deployment of salary surveys and co-authored white papers on compensation issues. Sonja's compensation work focuses on the Municipal and Non-profit sectors. Ms. Parkinson is a Senior Certified Professional in Human Resources and has a Master of Science degree in HR and Organizational Development.

Kim Robinson, Vice President

Kim will be assigned project tasks and will be a department liaison, run compensation reports and support the final report writing. Kim has worked in various aspects of compensation planning throughout her decade plus career in the private and public sectors, union and non-union environments. She has led projects in this area that have included job analysis, market research, survey development, compensation structure development, salary banding, and communicating about compensation. Kim's compensation projects are in the following industries: non-profit, municipal, and manufacturing with the largest organization over 153 unique positions. She holds an MBA in addition to her Bachelor's in Business as well as a Senior Professional in Human Resources certification.

David Johnson, Operations Director

David will be responsible for project tasks and will oversee the data analysis and visualization for the project. David has been working in various aspects of analytical consulting since 2013 in both the public and private sectors with organizations of varying sizes from large multinational corporations and federal agencies to local municipalities and companies employing fewer than 10 people. He has led projects that include job analyses, leadership development, cultural assessment and transformation, as well as VOC analytics, general survey development and compensation. The largest compensation project David has worked on encompassed 153 unique positions, a market

study, development of a new structure and communication plan. David holds a Master's Degree in Industrial and Organizational Psychology from Wayne State University. While he was a student at Wayne State, David held the position of President of the Wayne State University student chapter of SHRM.

Andrea Walz, Senior HR Consultant

Andrea will be responsible for project tasks. She will review job descriptions and be a department liaison. Andrea has worked in compensation planning over the last 5 years in both the private and public sectors. She has assisted with projects in areas that have included job analysis, market research, job description review, compensation structure development, salary banding, and communicating about compensation. Her expertise as part of the YYHR team have involved compensation projects in the following industries: municipal, and manufacturing with the largest organization over 153 unique positions. Andrea holds a Bachelor's Degree in Psychology from University of Michigan - Flint as well as a Professional in Human Resources (PHR) certificate.

Statement of Understanding

City of Fort Atkinson seeks to:

- Review, and revise, its salary structure and update policies, and procedures through the lens of the City of Fort Atkinson mission, vision, goals, and compensation philosophy.
- Attract and retain diverse qualified employees, provide salaries commensurate with assigned duties, and maintain a competitive position with surrounding businesses.

When working on projects involving compensation analysis, we ensure that our final recommendations are:

- Aligned with your current (or proposed) compensation strategy and philosophy
- Supportive of your mission, and vision
- Emphasize internal pay equity, and ensure employees are paid fairly in relation to their colleagues with similar experience and equal work contributions
- Designed to meet the needs of the City of Fort Atkinson
- Efficient to administer and communicate to staff

B. References

Below is a list of organizations for which we have provided Job Classification and Salary Study

215 W. Michigan Ave., Ypsilanti, MI 48197
Phone: 734-657-0370 E-Mail: amy.cell@yeoandyeo.com

services within the last 5 years. The City of Atkinson may contact all submitted references to obtain information regarding our performance. The scope and complexity has varied with each of the client references listed. We use the same approach for all of our wage and market study projects.

Firm/Agency Name Address Website	Project Title Scope Cost	Contact Person
Isabella County 200 N. Main Street Mt Pleasant, MI 48858 https://www.isabellacounty.org/	Comprehensive Job Evaluation, Analysis, Classification and Compensation Scope: 155 unique job classifications \$36,975	Nicole F. Frost Former Administrator/Controller nicole.frost@michiganforests.org
City of Rochester Hills 1000 Rochester Hills Dr. Rochester Hills, MI 48309 rochesterhills.org	Compensation Study Scope: 170 Unique positions City Union: 81 City Part-time: 22 City Manager Union: 11 City Non-Union: 56 \$25,000	Leslie Turnbull HR Analyst (248) 841-2520 turnbulll@rochesterhills.org
City of Farmington Hills 31555 W. Eleven Mile Rd Farmington Hills, MI 48336 https://fhgov.com/	Compensation Study Scope: 113 positions \$35,000	Lori Brown Director of Human Resources 248-871-2494 lbrown@fhgov.com

C. Compensation

Our not-to-exceed cost to complete the activities outlined in the project plan phases for this job classification and salary study project is: \$32,800. This does not include time or expenses for travel or FOIA fees, as outlined below. We would obtain permission before incurring either of these costs and consider them reimbursable by the City.

- This proposal will remain valid for at least ninety (90) days after the date of the proposal opening.

- 25% of payment will be invoiced upon contract signing.
- 25% of payment will be invoiced two months after contract signing
- 25% of payment will be invoiced four months after contract signing
- 25% of payment will be invoiced upon draft report delivery.
- Net 30 day terms are kindly requested.

Reimbursable Expenses

- Travel expenses are not included in the pricing as this project will be executed remotely, however, if travel is required, time and mileage will be considered reimbursable by the City of Fort Atkinson.
- Fees generated by Freedom of Information Act (FOIA) requests are not included in this proposal and shall be considered reimbursable by the City.

Post Project Additional Consultation Costs

As referenced in the scope of services, post project consulting will be at a fee of \$150/hour. Future job classification and/or reclassification requests can be reviewed and we would estimate to be at a cost of \$750 per job classification and/or reclassification requests. These post project and additional consultation costs are separate and not included in the \$32,800 cost proposal amount listed above.

D. Schedule/Timeline

We estimate that this project will take 12 weeks from kickoff, assuming a scope of approximately 32 unique job classifications. This timeline is based upon an award date no later than 05/12/2025 in order to be completed by 8/29/2025 as outlined in the RFP. Our proposed schedule can be modified in any way that best meets the needs of the City.

Phase	Activities	City's Involvement & Communication Method
Week 1 Project Kick-Off	We'll introduce the City of Fort Atkinson key stakeholders to the Yeo & Yeo HR Advisory Solutions service team, clarify timelines and collect key information, including but not limited to: - Current organization charts - List of comparable organizations	Provide requested information. Information to be provided electronically. Availability for questions and meetings. Review and approve

Phase	Activities	City's Involvement & Communication Method
	- Staffing plans (any future changes to be discussed) - All relevant current job descriptions - A current census for incumbents including compensation information, job classification, years of experience, education, credentials, and demographic information (if available) - Current compensation plan, annual compensation pay practices (COLA, merit, bonuses, etc.), current compensation philosophy, hiring pay practices, administrative guides, etc. - Relevant municipality survey data that should be included in our analysis - Annual compensation survey participation information including survey results - Employee handbook or any other documentation that has references to compensation pay practices We will schedule monthly touch base meetings for the duration of the project.	list of comparable organizations.
Week 2 Organizational Review	Our team will review the current organization chart, staffing plans, and current job descriptions to understand job design, departmentation, delegation, span of control, and chain of command. Review of current salary structure, career progressions, and current procedures for ensuring external equality and ongoing salary structure movement. Review of benefits provided as aligned by position and applicable union contract. Audit census list to job descriptions.	Availability for questions via emails and telephone. Provide supplemental information, as requested.

Phase	Activities	City's Involvement & Communication Method
Week 2-3 Department intake meetings Job Description and Job Classification Review	Our team will complete a detailed review of all current job descriptions and also meet with department directors to gain clarity on the roles, scope, authority, responsibilities, education, and other factors necessary for accurate classification and job matching. During our department leader meetings, we will also discuss the job description update process, organizations that are talent inflows or outflows, and obtain a list of positions that should be benchmark priorities. Our team will review the current jobs classification (job families, functions, levels, jobs, and roles). Classify newly created /unclassified /misclassified jobs. Review current career progressions, as it relates to compensation and recommend a process for other job families. Develop written criteria and guidelines for future job changes and reclassifications, promotions, interim positions, new job creation and classifications.	Provide contact information for leaders, scheduling assistance and ensuring leader availability for position discussions, as needed. Availability for questions via emails and telephone.
Week 3 - 7 Collect and Analyze Market Data, Job Matching, and Benchmarking	Collect and analyze market data (including data that is for public and private sector) We have access to compensation research surveys, including CompAnalyst and ERI. Preliminary verification of positions will ensure alignment between the City's job titles and comparable titles available for benchmarking in the marketplace. Job descriptions will be used to ensure appropriate matches are selected Our team will provide a multi-source market pricing research and analysis for base compensation.	Confirmation of comparable organizations. Availability for questions via emails, and telephone. Review and provide timely feedback. Assistance in getting contact information for comparable organizations.

Phase	Activities	City's Involvement & Communication Method
Week 8-9 Compensation Structure Development	After compensation benchmarking is completed, our compensation team will develop a recommended adjusted salary structure based on widely-accepted compensation management principles. This includes salary grades or bands as well as ranges outlining market minimums, medians and maximums that allows for career growth and progression. We will discuss our recommended salary range spread with you for review and feedback. We will also develop a process for the movement of employees from the old salary structure to the revised structure and assist in the development of employee communication regarding such movement. We will develop written criteria for ongoing salary structure movement. Draft compensation structure and position placement will be reviewed with a compensation committee and/or department leaders. Department leader draft placement to be reviewed and updated by an appropriate body.	Availability for questions via emails and telephone.
Week 10-12 Preliminary Report and Final reports Post project support	Produce comprehensive draft reports that outlines the methodology and documents the results of the preceding steps including market results and recommendations on how to administer the structure for the next 3 years. Presentation to leadership to discuss preliminary compensation study findings. We will provide 10 office hours during a two week period to answer questions and to support the communication/change management process. Two weeks after the draft report and office hours,	Availability for questions and discussion of preliminary report and change management process.

Phase	Activities	City's Involvement & Communication Method
	we will present the final report. Post final report, we are available to provide additional support at a rate of \$150 per hour.	

Thank you for allowing us this opportunity to submit this proposal.



Amy Cell
President Yeo & Yeo HR Solutions
734-657-0370
amy.cell@yeoandyeo.com

Professional Proposal Prepared for

The City of Fort Atkinson, Wisconsin



Classification and Compensation Study

Submitted By:
McGrath Human Resources Group

Corporate Office
PO Box 865
Jamestown, TN 38556

Wisconsin Office
Chippewa Falls, WI 54729

Dr. Victoria McGrath, CEO
victoriaphd@mcgrathconsulting.com
815.728.9111



April 18, 2025
5:00 P.M. CDT

April 18, 2025



Rebecca Houseman
City Manager
101 N Main Street
Fort Atkinson WI 53538

Dear Rebecca Houseman:

Thank you for the opportunity to submit our qualifications to become your compensation business partner to provide Classification and Compensation Services for the City of Fort Atkinson, Wisconsin.

Developing and maintaining a competitive compensation and classification plan in today's current environment is extremely challenging, yet essential to attract, motivate, engage, and retain a qualified workforce. McGrath Human Resources Group understands the issues public sector entities are facing as our firm provides human resources consulting services primarily for the public sector, with emphasis on compensation. We offer a transparent, engaging, and collaborative approach to develop a compensation solution built specifically for each client, which aligns with your compensation philosophy and strategy to attract and retain competent professionals, conform to all legal requirements, and fit within the City's fiscal reality.

Our process is built on communication and transparency. We start by working with City leadership and department heads to understand current compensation practices, challenges, and future needs. Our Firm utilizes Best Practices throughout the process, which includes real-time salary data from the identified comparables. Data analysis is then utilized to put this information into a meaningful summary format which is shared with the City. Based upon this market analysis and position analysis, we make recommendations that align with the City's desired compensation strategy. Once finalized, we prepare comprehensive reports with methodology, summary findings, and implementation strategies, followed by presentations to City leaders and employees. Our team remains available to support implementation, ensuring a smooth transition to the updated system.

Detailed information regarding our firm, consulting team, scope of work, work plan, methodology and process, proposed work schedule, project fees, and other required information are presented within this proposal. All conditions contained in the attached proposal are valid for a minimum of 90 days from April 18, 2025. I am the authorized individual to contractually bind the Firm and principal contact for this project.

As you review the proposal, if you have any questions or require additional information, please do not hesitate to ask. We look forward to the opportunity to work with the City of Fort Atkinson and its employees on this important project.

Sincerely,

A handwritten signature in blue ink that reads "Victoria J. McGrath".

Victoria J. McGrath, Ph.D., CEO

PO Box 365 Jamestown, TN 38556
815.728.9111 (office)

931.214.2262 (direct)

victoriaphd@mcgrathconsulting.com



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Firm Introduction

McGrath Consulting Group, Inc. was started in 2000, specializing in public sector consulting in the fields of human resource management and public safety (fire, EMS, police, and communications). Our Firm has over 20 professional consultants who are assigned to projects based upon their professional background and skill-set they bring to each client.

McGrath Human Resources Group is the Human Resources Division overseen by Dr. Victoria McGrath. Since 2000, McGrath has conducted hundreds of comprehensive compensation and classification studies nationwide, including Wisconsin. The Human Resources consulting team is comprised of experienced human resources practitioners from both the private sector and local city and county government.

Company Name	McGrath Human Resources Group
Parent Organization	McGrath Consulting Group, Inc.
Established	May 1, 2000
Years of Service	25
Type of Firm	Private Corporation
Company Mailing Address	P.O. Box 865 Jamestown, TN 38556
Responsible Party	Dr. Victoria McGrath, Ph.D., SPHR CEO
Email Address	victoriaphd@mcgrathconsulting.com
Phone Number	(815) 728-9111
Insurance	Erie Insurance: Auto and General Liability AmTrust: Workers Compensation Mount Vernon: Professional Liability Chubb: Cyber Security Liability
Office Locations	Chippewa Falls, WI Columbia, MO Jamestown, TN Junction City, KS Katy, TX Strongsville, OH

We do not offer an off-the-shelf work product, but rather, we approach each client with the goal to understand your organization, culture, current and future needs, and fiscal reality to develop total compensation solutions that are developed uniquely for you, align with your compensation philosophy and strategy, while using a collaborative and transparent process.

Our Firm also provides related human resources consulting which includes but is not limited to benefit analysis, job description development, HR Audits, performance management program development, Fair Labor Standards Act (FLSA) exemption reviews, training, policy development, operational studies, and staffing studies. Our Human Resources team is also involved in organizational and staffing studies related to public safety.

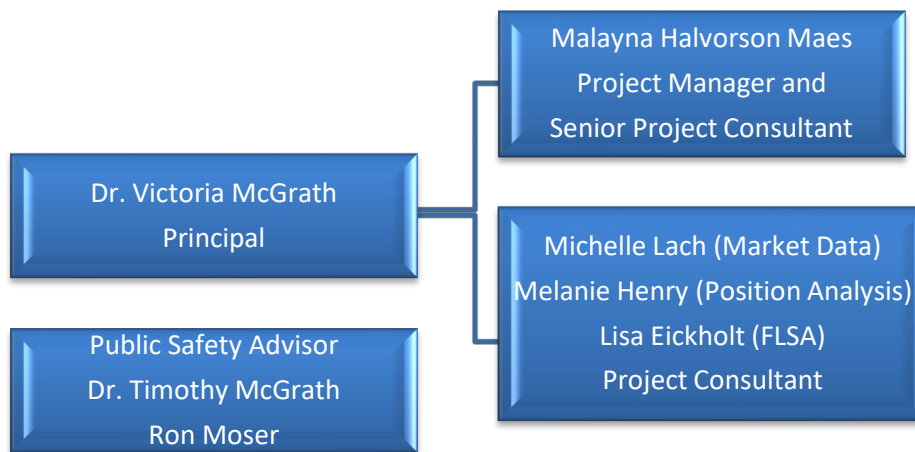


Qualifications of Staff

All consultants are McGrath consultants, and there is no subcontracting. There are no investigations, disciplinary actions, or pending complaints against any personnel by any national or state regulatory body of any nature.

The Consultants were selected for this project based upon their areas of expertise, specialties, related project experience. We operate under the philosophy of total team involvement and each team member has experience in all facets of project work and will work together to meet the goals of your project.

Further, we have the flexibility to involve other consultants with our organization to bring their unique perspective and expertise as needed. Primary members of the team and an overview of their project responsibilities are provided.



Principal: A principal of the company is actively involved in every project and is accountable for the project. This position will have authority over the contract and to bind the Firm.

Project Manager: This role has project oversight, will coordinate all work with the consulting team, will have direct routine communication with the City's project designee, and will be hands on in all aspects of the project's activities, leading the consulting team on targeted project activities, and performs primary duties of a project consultant.

Project Consultant: This role works on various project activities, which will include communication documents/tools, interviews, position questionnaire analysis, job description review, classification system development, market data collection and analysis, pay plan review, compensation system development, costing, and drafting reports.

Advisor: This role has specific subject matter expertise that may be called upon for additional consultation for the consulting team for public safety positions, as needed.



Victoria McGrath, Ph.D., SPHR
Chief Executive Officer and Principal

Dr. Victoria McGrath has an extensive background in the field of human resources, predominately in the public sector; but she also has a number of years in the private sector having worked in health care, banking, and education. She brings over 19 years as an HR practitioner in all phases of human resources prior to her years as a consultant.

Her professional experience includes the City of Brookfield, WI, which had over 500 employees, including five (5) labor unions; the Elmbrook School District, WI – the 2nd largest school district in Wisconsin, also with 5 labor unions; and Citicorp Banks. She has dealt with labor/employee relations; policy, procedure and labor compliance; benefits and compensation; recruitment and staff development. Dr. McGrath's local government experience touched all local services including police/sheriff, fire, public works/highway, engineering, library, health department, administration, courts, jail, and more.

Dr. McGrath has provided management assistance to more than 200 local government clients on a variety of management issues. In addition to working with government, she has been a speaker for a number of professional organizations and worked with two (2) organizations in developing courses in human resource management to current and upcoming supervisors. Further, she is an adjunct professor – teaching in areas such as human resources, organizational development, management, and research – at Northwestern University (Master's in Public Policy Administration Program).

Dr. McGrath's doctoral dissertation dealt with Government as a Learning Organization. Her research dealt with government efficiency in providing services and how governmental services can become more effective.

YEARS WITH FIRM: 25

EDUCATION

- ♦ Ph.D. – Municipal Government as a Learning Organization, University of Wisconsin – Milwaukee, WI
- ♦ Master of Science – Management, Cardinal Stritch College, WI
- ♦ Bachelor of Science – Industrial Relations & Finance, University of Wisconsin – Milwaukee, WI

PROFESSIONAL AFFILIATIONS

- ♦ Society for Human Resources Management
- ♦ Illinois Public Employer Labor Relations Association
- ♦ National Public Employer Labor Relations Association
- ♦ International City/County Manager Association



Malayna Halvorson Maes
Senior Consultant & Project Manager

Malayna Halvorson Maes has served as a human resource professional in both the private and public sectors for over 20 years. She worked previously in health care human resources, then as the Human Resources Director and senior advisor for a large county in northwestern Wisconsin. Thus, she has direct experience with the many challenges facing municipal employers.

During her time in county government, Ms. Maes advised the organization through the significant changes at the State level (referred to as Act-10) that resulted in a reduction from five (5) collective bargaining units to one (1) unit, due to reduced legal authority of organized labor in the public sector. As a change agent, she facilitated the development of significant policy changes for the organization. This included conducting a complete evaluation of the compensation system for the county which included implementation of a pay for performance evaluation system. This system was created through the work of a combined employee – manager committee and included the implementation of a performance management software system to streamline the 360-evaluation process. She brings a practical understanding to the development and implementation of complex compensation systems.

As a former Wisconsin Human Resources Director, she is knowledgeable of all facets of local government, including police, public works, engineering, health services, and more. She has been active in a number of professional organizations including SHRM, Chippewa Valley Society of Human Resource Management; WIPFLI Senior HR Forum; Wisconsin Association of County Personnel Directors, and the National Public Employer Labor Relations Association. In addition, she served on the WACPD training Committee, Chair of the Legislative Affairs Committee, a Board of Director member as well as a member of the Services Committee for WPELRA; thus, she takes an active role in defining the profession.

YEARS WITH FIRM: 12

EDUCATION

- ♦ Bachelor of Arts– Psychology, Luther College, Decorah, IA

PROFESSIONAL AFFILIATIONS

- ♦ Society for Human Resources Management
- ♦ National Public Employer Labor Relations Association
- ♦ World at Work, Total Rewards Association

CERTIFICATION

- ♦ Certified Compensation Professional (in process)



Michelle Lach
Project Consultant – Data

Ms. Lach provides critical research and analytical skills to our compensation and benefits studies. Ms. Lach had ten (10) years of professional human resources experience prior to her time with the Firm in the private sector as an HR Director for a manufacturing company and a pharmaceutical company. Her professional experience with the Firm includes the development of employee handbooks and job descriptions, but now works exclusively with compensation and benefit survey designs and execution, and market research. These critical responsibilities include obtaining, compiling, and analyzing complex data and other information for projects, and supporting the project manager as needed.

YEARS WITH FIRM: 20

EDUCATION

- ♦ Bachelor of Arts– Communication and Organizational Development
Bowling Green State University, Bowling Green, OH
- ♦ Human Resources Program Certification – Baldwin Wallace College, Berea, OH

Melanie Henry
Project Consultant – Position Analysis

Melanie Henry has served as a human resource professional in both the non-profit and public sectors for over 25 years. She worked as the Human Resources Manager for a stand-alone public library in mid Missouri for the majority of her time prior to joining McGrath in 2023.

During her time in local government, Ms. Henry advised the organization through evaluations and implementations of defined benefit retirement benefits, paid leave conversion, timekeeping audit and systems, Library Board liaison for Executive Director recruitment and annual performance evaluation, classification and compensation plan, policy development and employee development program. She also provided guidance during a unionization effort and negotiations of the collective bargaining agreement.

She has been active in a number of professional organizations including SHRM and Human Resource Association of Central Missouri (SHRM chapter). In addition, she served on a local City Personnel Advisory Board, and the Human Resources Association of Central Missouri Board.

YEARS WITH FIRM: 3

EDUCATION

- ♦ Bachelor of Arts– Psychology, University of Missouri - Columbia
- ♦ Human Resource Management Certificate – University of Missouri – St. Louis

PROFESSIONAL AFFILIATIONS

- ♦ Society for Human Resources Management
- ♦ Human Resources Association of Central Missouri (HRACMO)
- ♦ World at Work, Total Rewards Association



Lisa Eickholt, SCP
Project Consultant - FLSA

Lisa Eickholt brings over 30 years of local and state governmental Human Resource and management experience. Most recently, she served as a county Human Resource Director for over 18 years. She not only brings current human resource methodologies, but also knowledge of county government. In her county, she not only served as the director of human resources but was also relied upon by the County Board to function in an assistant county administrator role. Thus, she brings not only personnel, but overall county operations knowledge and experience to the project.

Ms. Eickholt was responsible for developing and eventually was hired as the County's first human resource professional. In the position, she had responsibility for developing all the County's personnel practices and policies, as well as compensation systems.

Due to her 25 plus years of experience in local government, Ms. Eickholt has been a presenter at workshops and seminars on various HR and Leadership topics to county and city leaders and employees with the Kansas Association of Counties; Kansas County Commissioners Association, as well as Wichita State University to name a few.

Ms. Eickholt was a co-founding member and charter president of the Kansas County Human Resource Association; co-founding member and charter secretary for the IPMA-HR – Kansas Chapter; and, is a (retired) member of National and Kansas IPMA-HR chapters, and National and Kansas SHRM Chapters. Ms. Eickholt has completed all the necessary work and testing for Senior Certified Professional certification from both IPMA-HR and SHRM.

EDUCATION

- ♦ Bachelor of Science – Business Management, Kansas State University

YEARS WITH FIRM: 14

PUBLIC SAFETY ADVISOR

McGrath Human Resources will partner with the parent company – McGrath Consulting Group in the areas of public safety, as needed.

- Dr. Tim McGrath has over 30 years of experience in fire, EMS, communications and emergency management and currently heads the Fire Division, performing operational studies throughout the United States. He served as Chief of fire departments in Gurnee, Illinois and Brookfield, Wisconsin. Dr. McGrath has been an independent consultant since 1997 and is a speaker well-known for his motivational presentations in the United States and internationally. He earned a doctorate in management, a dual master's degree in public administration and management, a bachelor's degree in industrial education, and an associate degree in fire science management.
- Ron Moser has over 30 years of experience in law enforcement serving six municipalities in three states. Serving as Chief for departments within a metropolitan area. Mr. Moser also served as Director of Emergency Management and Village Manager for Hanover Park, Illinois, a municipality of Cook County. He currently heads the law enforcement division performing operational studies throughout the United States. Mr. Moser has two master's degrees in Criminal Justice and Corrections and Law Enforcement Administration.



Consulting Team Wisconsin Work History

McGrath primarily works with public-sector organizations including counties, cities, villages, townships, districts, and even State agencies. The following is a list of compensation and classification projects this consulting team is currently working or has worked on in the State of Wisconsin over the last five (5) years. **For brevity, projects in other states were not included, but can be provided.**

Barron County, WI	Green County, WI
Burnett County, WI	Juneau County, WI
Chippewa County, WI	LE Phillips Memorial Public Library, WI
City of Beloit, WI	Marathon County, WI
City of Bloomer, WI	Monroe County, WI
City of Chetek, WI	Oconto County, WI (in process)
City of Chippewa Falls, WI	Outagamie County, WI
City of De Pere, WI	Polk County, WI
City of Eau Claire, WI	Portage County, WI
City of La Crosse, WI	Racine County, WI (in process)
City of Lake Geneva, WI	Rock County, WI
City of Marshfield, WI	Sauk County, WI
City of Monroe, WI	Sheboygan County, WI
City of New Berlin, WI	Somerset School District, WI
City of Plymouth, WI	St. Croix County, WI
City of River Falls, WI	Vernon County, WI
City of Watertown, WI	Village of Grafton, WI (in process)
City of West Bend, WI	Village of Mount Pleasant, WI
Columbia County, WI	Village of Rib Mountain, WI
Dodge County, WI	Winnebago County, WI
Douglas County, WI	Wisconsin Employee Trust Funds, WI
Eau Claire County, WI	Wood County, WI
Everett Roehl Marshfield Public Library, WI	

As requested, more detailed information on the size and scope of some of these projects can be found in the References section of the proposal.

References

McGrath Consulting is proud to list over 620 client projects. Below are a few compensation studies either within the region and/or are similar to your project. ***Additional client names, projects and locations are viewable on our website at www.mcgrathhumanresources.com and their contact information will be provided upon request.***



Client Name	Description
City of Watertown, WI Lisa Schwartz Human Resources Coordinator 920-262-4058 LSchwartz@watertownwi.gov	Developed a new compensation and classification system for all non-union positions in the city in 2025. Benefits were also included in the project. Implementation is planned for 2026
City of Plymouth, WI Tim Blakeslee City Administrator/Utilities Manager 920-893-3745 TBlakeslee@plymouthwi.gov	Developed a new compensation and classification system for the city in 2025 that included general employees, public works, and electric utility. Benefits were also included in the project.
City of Monroe, WI Brittney Rindy City Administrator 608-329-2527 brindy@cityofmonroe.org	Developed a new compensation and classification system for the city in 2023. Benefits and job description redevelopment were also included in the project. Union data collection was included for negotiation purposes.
City of Marshfield, WI Sarah Dresel Human Resources Director 715-486-2004 Sarah.dresel@ci.marshfield.wi.us	Comprehensive compensation study in 2018 for non-union employees, and compensation recommendations for Police and Fire (union) for collective bargaining purposes. Conducted a Compensation Study for the City Library in 2019 to align with the general City Compensation System in the future. Conducted a market update in 2023, which was implemented in summer 2024. The compensation model was also restructured with this most recent update. Ongoing services for new position or position changes occur as needed.
Village of Mount Pleasant, WI Mary Cole Human Resources Director 262-664-7837 mcole@mtpleasantwi.gov	Comprehensive compensation schedule was updated in 2019 based upon market updates and organizational restructuring resulting in significant position adjustments. Job Descriptions were also developed in 2019. Market update in 2022 and 2024
City of West Bend, WI Michelle Hoey HR Director 262-335-5107 hoeym@ci.west-bend.wi.us	Comprehensive compensation schedule was developed in 2022. Ongoing services.
Columbia County, WI Jodi Burmania Human Resources Manager 608-742-9669 jodi.burmania@columbiacountywi.gov	A comprehensive classification and compensation schedule was completed in 4 th quarter 2024 for all classifications. Implementation started in January 2025.
Dodge County, WI Tonia Mindemann Human Resources Director 920-386-3691 tmindemann@co.dodge.wi.us	Comprehensive classification and compensation schedule was developed with benefit recommendations for 250+ non-union job classifications, inclusive of a skilled nursing facility. Implementation occurred in 2021 due to COVID delays. Project also included job description updates and performance evaluation process. Services are ongoing to conduct market reviews in job categories



	as needed, in addition to advising county board on annual adjustment strategies.
Sauk County, WI Anna Cooke Human Resources Director 608-355-3271 anna.cooke@saukcountywi.org	Comprehensive classification and compensation schedule was developed in 2023 for non-union job classifications, inclusive of a skilled nursing facility. Implementation occurred January 2024.
Monroe County, WI Ed Smudde Human Resources Director 608-269-8719 ed.smudde@co.monroe.wi.us	Comprehensive classification and compensation schedule was developed in 2022 with benefit recommendations for non-union job classifications, inclusive of a skilled nursing facility. Project also included job description updates. Ongoing services for new position or position changes occur as needed collaboratively with Human Resources.
Green County, WI Delores Merrick Human Resources Director 608-328-9655 dmerrick@greencountywi.org	Comprehensive classification and compensation schedule was completed in May 2024 for non-union classifications with a July 2024 implementation. Benefits review against the market was also included. Union data collection was included for negotiation purposes.
Juneau County, WI Mechelle Thompson Human Resources Director 608-847-9344 mthompson@juneaucountywi.gov	Comprehensive classification and compensation schedule was completed in March 2024 for non-union classifications. Implementation is scheduled for July 2024.
Burnett County, WI Nathan Ehalt County Administrator 715-349-2181 nehalt@burnettcounty.org	Comprehensive compensation schedule was updated in 2019 based upon market updates and implemented new internal comparability indicators into existing Schedule. Adoption of updates occurred in 2020. A Market update occurred in 2022. Ongoing services for new position or position changes occur as needed collaboratively in addition to advising Administration on compensation strategies based upon their comparable market and available fiscal resources.
Marathon County, WI Molly Adzic Human Resources Director 715-261-1406 molly.adzic@marathon.wi.us	Comprehensive classification and compensation schedule was developed in 2022 for non-union job classifications, inclusive of regionalized IT and ADRC departments. Services ongoing.
Barron County, WI Rachel Richie Human Resources Director 715-537-6825 rachael.richie@co.barron.wi.us	Conducted Performance Evaluation training for supervisors in 2016. Rehired in 2017 to develop new compensation system for approximately 300 job titles. Rehired in 2019 to complete job description updates and develop point factoring process. Compression analysis occurred in 2021. Market update in 2024.

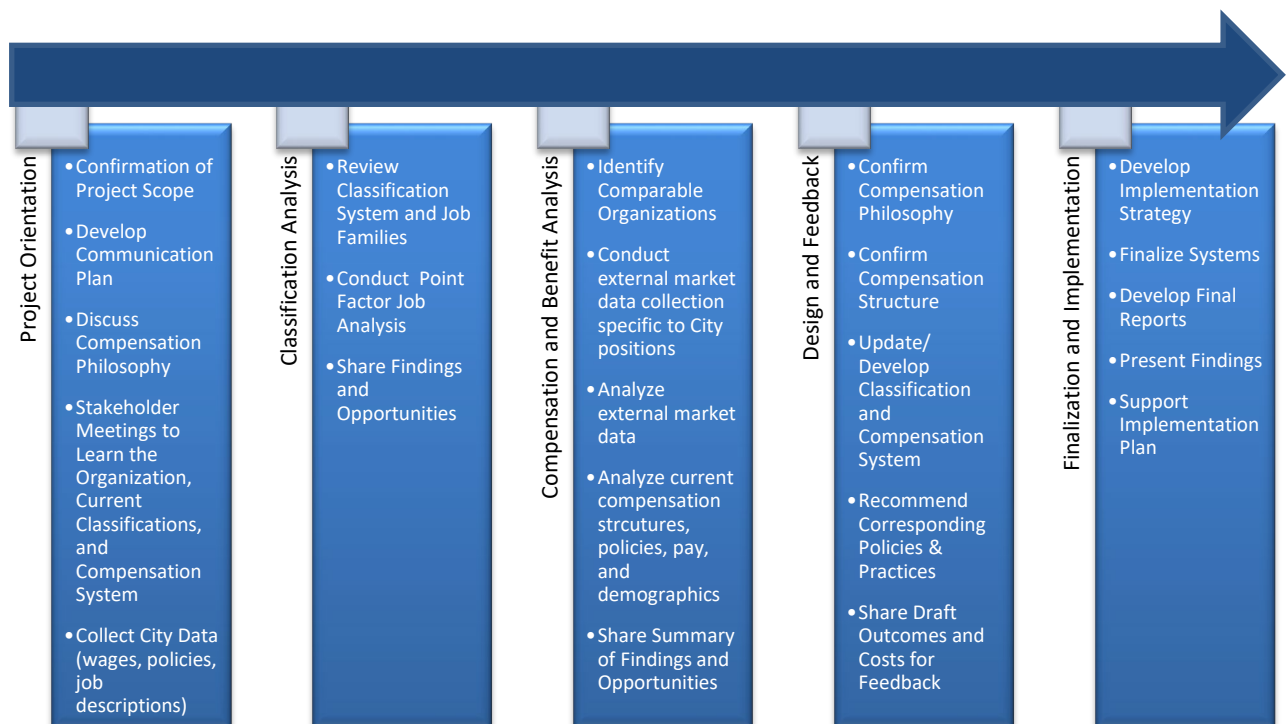


Methodology and Approach

In any governmental organization, salaries and benefits are typically the largest budget item. An investment in your employee's compensation plan is an investment in your community, and we recognize the investment you are making is with tax dollars. We also understand a competitive compensation system is an important element for the City's ability to hire, cultivate, and retain employees who provide service and value to all City stakeholders, regardless of the organization's size.

Similarly, internal equity, proper classification, career opportunities and addressing of any compression issues serves to enhance the employee's feeling of value and willingness to actively engage in their work for the organization. Therefore, it is important for the City to have a system that promotes the active engagement of employees, is non-discriminatory, is legally defensible, is efficient to manage, and can accommodate organizational growth and change. Thus, we tailor our services to meet the needs and unique structure and culture of the City.

Our methodology and approach are characterized by a systematic, logical series of tasks aimed at assuring thoroughness, consistency, and objectivity. After conducting a needs assessment with the City, confirming the City's compensation philosophy with City leaders, and analyzing the current System in place, our Firm utilizes Best Practices throughout the process, which includes salary data and job content data from multiple City sources and its mutually identified comparables. Data analysis is then utilized to put this information into a meaningful summary format which is shared with the City. A visual summary of the project plan is provided below with the detailed methodology and work plan following.



We will tailor our projects to meet the needs and unique structure and culture of your organization, with the principles of collaboration, communication and transparency in mind while developing a sound work plan with identified deliverables. The following proposal steps can be discussed and adjusted to meet the projects needs for the City.



1. Project Orientation

- ❖ Communicate with the City's project designee to:
 - Provide a list of documents and data needed to begin the project.
 - Discuss project expectations and milestones.
 - Begin developing a communication plan.
 - Schedule initial meetings.

Our philosophy is to tailor each project to meet the needs, unique structure, and culture of your organization, with the principles of collaboration, communication and transparency in mind while developing a sound work plan with identified deliverables.

We develop a communication plan at the onset of the project so the Firm can provide routine updates on progress as well as discuss any issues that may result in a delay or a challenge within the project. Our Project Manager coordinates meetings, data sharing, and ensures the work plan is progressing according to the designed work plan so the deliverables are met within the scope and timeline of the project.

2. Project Initiation and Assessment

The consultants will conduct introductory meetings to meet with City leaders, Compensation Project Team, and all Department Directors/Managers to:

- ❖ Explore your organization's current compensation system, compensation philosophy and strategy.
- ❖ Gain an understanding of the goals, values and structure of the overall organization.
- ❖ Gather information for each individual department including any unique responsibilities associated with positions, strengths and weaknesses of the current system, or issues with recruitment/retention.
- ❖ Identify future needs.
- ❖ Review provided documents and data.
- ❖ Finalize project communication expectations and strategies, project timeline, and identifiable milestones.

Our philosophy is to have direct conversations with management and administration to identify challenges and concerns with the current system and future needs; so, we may develop comprehensive recommendations to best address those needs.

Other Introductory communications are recommended:

- ❖ Conduct introductory meetings with elected officials to discuss elements of compensation philosophy and expectations.
- ❖ Introductory employee communications and/or meetings to explain the process of a compensation study, introduce the consulting team, expected assistance, describe the general outcome of the Study, and other related topics as desired by the City. This can be done in-person or virtually.

Communication with elected officials and/or employees during the project allows engagement and offers factual information.

From first site visit, the consulting team will identify:

- ❖ The strengths of the current compensation system.
- ❖ Areas that need to be addressed or are concerns to the current programs.
- ❖ Current compensation program success and challenges.

It is our belief that identifying and establishing a compensation philosophy allows for the development of strategic recommendations, such as placement in the market



- ❖ Other characteristics about the City which may impact compensation.

An analysis of this data as well as external data collection will be the basis of developing a compensation philosophy that will guide the design and complexity of the City's compensation program. A consistent philosophy will provide a strong foundation for the City. Without a philosophy, leaders often find themselves unsure what to offer as a total compensation package.

3. Classification Analysis (Job Analysis)

Visit our link online to watch a brief video of our PQ process:

<https://youtu.be/OuTcURwtl0o>

A **job analysis** objectively evaluates the duties, responsibilities, tasks, and authority level of each City position and identifies hierarchy, career progression opportunities, **and internal equity**.

*Our philosophy is that job analysis is critical not only for internal equity, but also the establishment of a standardized classification system which will be used to establish **pay equity** between positions.*

The job analysis would include completion of a Position Questionnaire (PQ), which is a standardized tool used to analyze each position on identified factors. The **McGrath 360Comp™** PQ has been developed **specifically for use in public sector** organizations. This Questionnaire is recommended to be completed on all job titles for purposes of:

- ❖ Expounding upon information provided in job descriptions.
- ❖ Evaluating position responsibilities regarding necessary competencies, experience, education, finances, judgement, decision-making and other expectations which provide value to the City.
- ❖ Clarifying instances where statements in the existing job descriptions are vague or absent.
- ❖ Updating and aligning classification changes.
- ❖ Identifying career progression opportunities.
- ❖ **FLSA Designation.**
- ❖ **Job description updates.**

The **McGrath 360Comp™** point factor process used to complete the job analysis goes beyond the typical "Knowledge, Skills and Abilities" (KSA's) and explores factors that are unique to public sector positions including the following aspects of a job:

- ❖ Records, Reports and Programs
- ❖ Impact of Decisions and Consequents of Errors
- ❖ Contact with Others (both inside and outside the organization)
- ❖ Equipment, Machines and Tools
- ❖ Budget, Financial, and Cash Handling
- ❖ Education, Experience, Licensure/Certifications
- ❖ Complexity and Judgment
- ❖ Confidential Data
- ❖ Stress (degree of mental or emotional fatigue or stress inherent to the job)
- ❖ Technology
- ❖ Leadership and Supervisory Responsibilities
- ❖ Work Environment and Physical Requirements

Supervisory Review/Verification. Each incumbent's supervisor or Department Director will be given time to review the completed PQ for content and accuracy, and to comment in a designated area of the



document. They will sign off on their review prior to submission to the Consultants. If needed, the consulting team may speak with Department Directors, Supervisors, and Human Resources for additional position clarification.

Outcomes. From this process, the current classification system will be updated, as needed.

The point factor system for job analysis is teachable, so our clients can continue to use this methodology on their own should they choose. Compensation systems are more likely to be kept up-to-date and relevant which extends the lifecycle of a plan with this tool.

Job Description Document Updates/Development

The Position Questionnaire process will identify job description updates that may be needed. If desired by the City, the Firm can either update the current job descriptions in their current format, or the Firm can completely rewrite all job descriptions with a tailored yet standardized and compliant format to meet the needs and desires of your organization. The template is developed cooperatively between the City and McGrath. Any documents developed will be submitted in draft form and one edit is included in the price before being turned over to the organization as final. The cost for updating your current job descriptions is included in the project costs.

4. Compensation Analysis

A Compensation analysis determines the organization's relative position in the comparable labor market. This analysis allows City leaders to understand the organization's compensation as a whole and by position, allowing them to make sound compensation decisions. Compensation Analysis will consist of the following:

A market survey is developed specific to the City's positions. We believe that collecting fresh market data establishes a more accurate look of the current market. We do not utilize third-party market surveys unless requested or discussed with the client in advance.

- ❖ ***The City and consulting team will cooperatively identify Comparable Organizations as the labor market.*** The City will have input into the list and must approve the list of comparables prior to starting the external market survey.
- ❖ McGrath consultants will ***collect external market data*** in real-time specific to the City's positions
- ❖ The consultants will ***analyze salary data***. The data collected includes minimum, midpoint, maximum, and incumbent salary information for each benchmark position; and other data points as needed. A statistical analysis is conducted on each dataset to ensure consistent and objective analysis. The outcome is then calculated into a ratio between the market and the City to measure the City's alignment against the market.
- ❖ The consultants will examine the status of your current compensation systems including ***structural analysis, special pay analysis, compression analysis, and incumbent pay analysis*** to give guidance to the consultants for compensation and implementation recommendations and will also ***provide information to the City regarding overtime, promotional and retention opportunities, and internal equity***.
- ❖ The consultants will ***review your compensation-related policies*** for compliance and best practices. We will make recommendations for policy updates or considerations that impact the City.



The consultants will also gather and analyze external and internal demographic data and workforce metrics to define:

- Employee's tenure within the organization as well as tenure in current position.
- Turnover rate for the organization.
- Local geographic and economic factors impacting the attraction and retention of employees.

Understanding your employee demographics and external challenges allows for the development of strategic recommendations.

The outcome of this portion of the project is very important because it identifies current trends and future predictors. This information guides the consulting team in developing strategy options and recommendations for the City's current and future needs.

5. McGrath 360Comp™ Integration

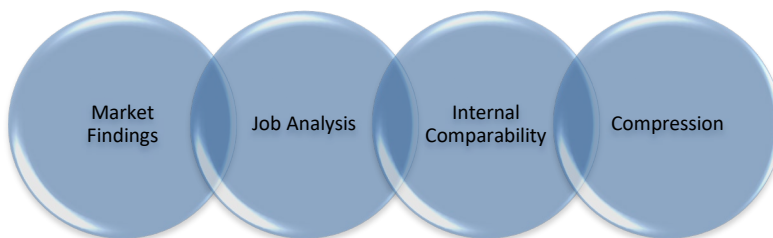
Upon completion of the compensation analysis and job analysis, etc. the consultants will engage the City to:

- ❖ Confirm the recommended compensation philosophy.
- ❖ Discuss the data obtained and share summary findings and trends found in the analysis as it compares to the current Compensation System.
- ❖ Discuss the tie between the compensation system, performance, and tenure, and provide recommendations to strengthen the City's desired compensation model.

Our philosophy is to help the City understand the full picture between the job analysis, compensation analysis, and summary market findings, which allows the City and consulting team to have a meaningful dialogue to confirm the desired place in the market, desired compensation system model, and other compensation solutions identified.

6. Classification and Compensation Systems Update and Review

The Compensation System(s) will be updated with the following information:



Allowing City leaders and department directors the opportunity to review our recommendations in advance of finalization provides an opportunity for dialogue and sound quality control.

the fiscal needs, culture, and compensation strategy of the City. While some entities can fully implement the compensation systems immediately, some clients have utilized a phased approach. **Compression relief may also be a factor in this process.** We will work with the City to ensure that any phased approach fits with best practices and your fiscal realities. The proposed price includes up to three (3) costing iterations.

The consultants will develop a **detailed fiscal impact** of the Compensation Systems and will present **implementation strategy options** that fit

Once the System is updated, the consultants will meet with appropriate City personnel to **review the draft**



Compensation System(s). This visit will include meetings with the City’s project designee and each Department Director to review placements to identify any concerns prior to finalization. This provides an opportunity to discuss any concerns in placement in the current system and/or ensure proper placement if the System(s) are redesigned.

7. Finalization

Up to two (2) Reports will be developed based on the needs of the project. This could include the following:

The City will receive the Compensation and Classification documents and cost estimates in editable format for the City to maintain/integrate.

A **Compensation Policy/Procedure Manual.** This report details:

- a. Study methodology and summary findings.
- b. Recommended compensation structure modifications.
- c. Recommended position title, classification specification, or career progression changes.
- d. Fiscal impact and implementation strategies.
- e. Policies and procedure modifications or to adopt to administer and maintain the system in-house going forward.

A **Final Report.** This report details:

- a. Executive Summary of methodology and visual summary finding graphs.
- b. Recommended compensation structure modifications.
- c. Recommended position title, classification specification, or career progression changes.
- d. Fiscal impact and implementation strategies.
- e. Policies and procedure modifications or to adopt to administer and maintain the system in-house going forward.

These reports will first be provided to City Administration in draft form to allow for feedback before the reports are placed into final form and provided electronically.

8. Presentation and Communication

The Study includes a **presentation to the City Council and employees.**

We stand behind our methodology and process, and recommendations. We are available to present findings.

The consulting team will also be available to introduce the recommendations to employee groups to the depth, and in the manner, you prefer and offer suggestions and recommendations on how to best communicate this information. We prepare correspondence and notices tailored to our client, whether for written, verbal or electronic presentation.

9. Ongoing Support and Training

McGrath Human Resources Consultants will continue to work with your organization to **support implementation** of the compensation system at no additional cost.

We will continue to assist the City through implementation and beyond.

The City may also consider its future needs as follows:

- ❖ McGrath Human Resources believes in providing our clients with the tools to be able to manage their Compensation System independently, if the client desires.



- ❖ Alternatively, some clients prefer that McGrath Human Resources set current and future pay grade placements, position changes, and job description development rather than completing that in-house. This can be done for a nominal fee depending upon the time involved in the placement.

Proposal Timeline

Based on the size and scope of the project, this is typically a 4-5 month process, which is close to the City's expected project timeline. The completion date of the project will be heavily driven by the date the City starts the project among other factors. Starting May 7, 2025, is highly recommended. Task numbers are associated to the project plan outlined numerically above. We recommend the following:

Activity	May				June				July				August			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Task 1 – Project orientation/scheduling and planning																
Task 2 - Project Kickoff meetings with identified stakeholders for information meetings																
Task 3 –Position Questionnaire and Job Analysis																
Task 4 - Market Data collection and analysis																
Task 5 - Review Findings with City																
Task 6 – Update Compensation and Classification Systems																
Task 6 - Review Recommendations and Cost with City;																
Task 7 - Finalize changes. Provide Draft Reports for City review. Finalize Reports.																
Task 8 – Presentations	Determined by the City															
Job Description Updates	Following Classification Determinations															

Project Progress Communication

Since we work closely with our clients, open communication and collaboration between the consulting team and project designee is critical for the project to be most successful. Because of that, we will develop a communication plan at the onset of the project so the Firm can provide routine updates on progress as well as discuss any issues that may result in a delay or a challenge within the project. Our designated project manager coordinates meetings, data sharing, and ensures the work plan is progressing according to the designed work plan so the deliverables are met within the scope and timeline of the project.



Cost of Services

McGrath Human Resources sets project fees based on the total project, which ensures the project comes in at the budgeted amount. Therefore, the fees listed below include all consulting professional fees, and administrative costs, excluding travel.

Classification and Compensation Study for an estimated 60 titles with Job Description updates (utilizing your existing descriptions and format)	\$39,075
Travel - Not to exceed based upon actual expenses*	\$ 3,000
Project Not to Exceed Amount	<u>\$42,075</u>

*Travel: In-person site visits may not be needed nor desired. Travel expenses will be billed only if incurred and based on actual expenses, not to exceed the price listed. This would be limited to airfare, mileage/car rental, hotel and dinner for the consulting team. All in person site visits will be determined with the City in advance and based upon the needs of the project.

Terms of Payment

Payment for the Project will be made in four (4) installments (\$39,075):

\$ 5,000 upon completion of the signed contract;
\$ 19,075 upon submission of the draft salary schedule;
\$ 11,000 upon submission of the draft report; and
\$ 4,000 plus actual travel (not to exceed \$3,000) upon submission of the final report.

All invoices are due within 30 days of receipt. Proposal cost is good for a minimum of 90 days from April 18, 2025. Dr. Victoria McGrath is the individual with the authority to negotiate and contractually bind McGrath Human Resources in any type of negotiations and contracts.

Optional Services

In most compensation studies, there are areas that must be addressed that are not planned for. In the 25 years McGrath Consulting Group, Inc., has been in business, it has never increased the agreed upon price and will address these areas. In the event the work is so beyond the scope of the original project, the Consultant will work with the City to either bill the service at an hourly rate, plus travel fees; or determine a fixed price. However, no work will begin until an agreement with the City has been approved.



Bolton

Classification and Compensation Study

For Bolton:
Dan Ripberger
President, Bolton Rewards
3825 Edwards Road, Suite 103
Cincinnati, OH 45209
(513) 290-1770
djripberger@boltonusa.com



Proposed Consulting Services

April 18, 2025

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I. Introduction

Background

The City of Fort Atkinson, Wisconsin (Fort Atkinson, the City) is a city located in Jefferson County, Wisconsin. Fort Atkinson is a vibrant and growing community located along the Rock River, a few miles upstream from Lake Koshkonong. As of the 2020 census, the City's population was 12,570, and is the largest City located entirely in Jefferson County. The City developed at the former site of Fort Koshkonong which was used during the 1832 Black Hawk War.

Fort Atkinson offers a full complement of total compensation programs designed to attract, retain and engage the type and caliber of staff required to provide services and meet the expectations of the community. Its human resources staff actively manage the total compensation program to ensure its alignment with City needs.

Fort Atkinson is currently seeking proposals from qualified consultants to conduct classification and compensation study services. As experts with specialized knowledge of public sector compensation systems across the United States, Bolton submits this proposal describing our approach, planned team, and expected timing and fees to complete the desired study.

Objectives

The primary engagement objective is to review and, if needed, recommend changes to Fort Atkinson's classification and compensation program. Based on our current understanding and expertise in organization development, classification, and total compensation, meeting this objective will require the review of specific elements:

- Reward philosophy;
- Job documentation and evaluation;
- Market compensation benchmarking and analysis;
- Base pay structure(s) with grade and ranges;
- Job classification and grading; and
- Base pay delivery policies (market adjustments, merit adjustments, etc.).

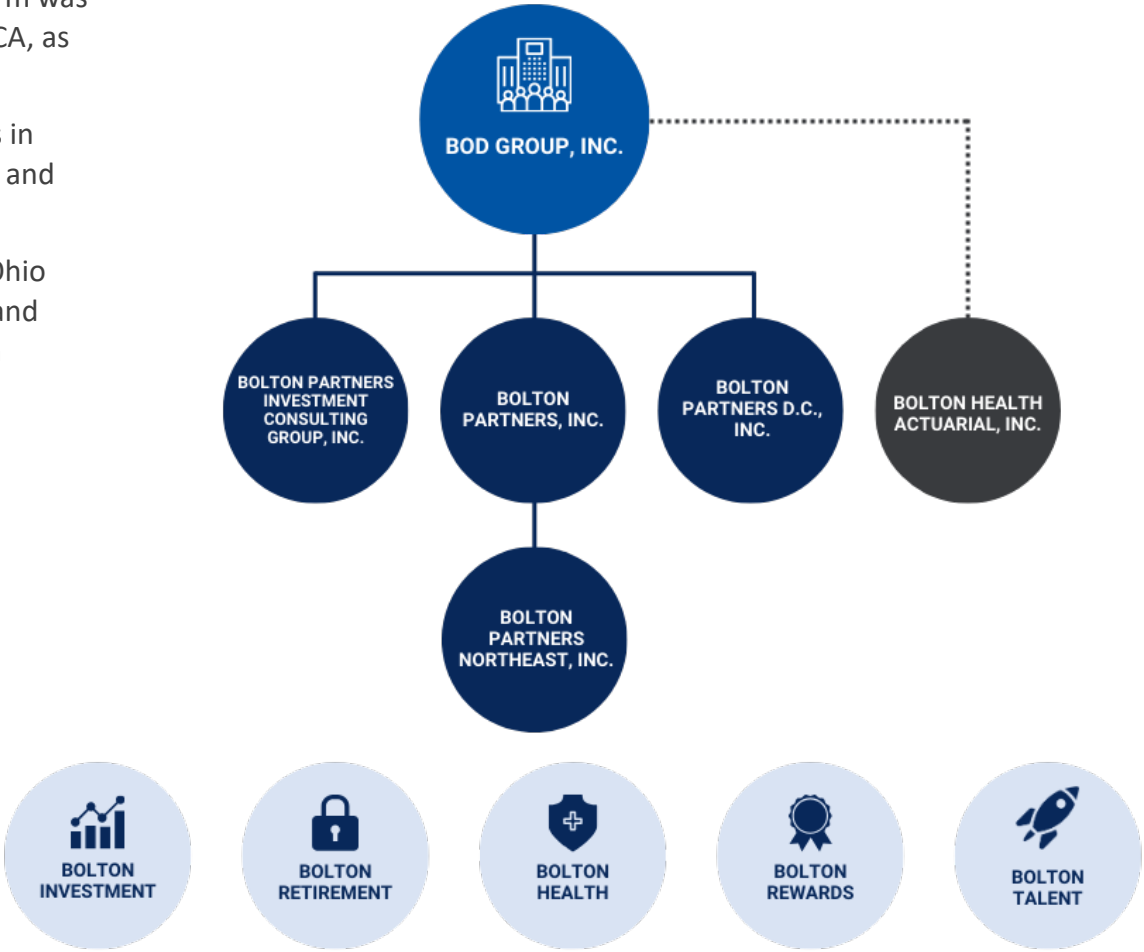
II. About Bolton

Bolton Partners, Inc., or Bolton, is a national full-service consulting firm with over 40 years of experience providing consulting services to clients in the public and corporate sectors, nonprofit organizations, as well as for the Federal Government. The firm was founded in 1981 by Mr. Robert G. Bolton, FSA, EA, MAAA, FCA, as an independent actuarial and employee benefits firm.

Headquartered in Baltimore, Maryland, we also have offices in Colorado, New Jersey, Virginia, Georgia, Ohio, Pennsylvania, and Virginia.

Our project with Fort Atkinson will be managed out of our Ohio office in Cincinnati. The person authorized to bind the firm and answer questions, as well as manage the engagement when selected, is specified below.

Dan Ripberger
President, Bolton Rewards
Bolton Partners, Inc.
3825 Edwards Road, Suite 103
Cincinnati, OH 45209



II. About Bolton

More About Bolton Rewards

Bolton Rewards is the reward strategy and compensation consulting and services practice of Bolton. Our team of reward experts has provided reward strategy and compensation consulting services for over 30 years and maintains specific expertise and experience in:

- Total Reward Strategy;
- Organization Performance and Design;
- Classification and Compensation Programs;
- Performance Management; and
- Market Surveys and Research.

We help our clients build and optimize their people.

- Organizational and staffing assessments;
- Climate studies and engagement surveys;
- Employment value proposition definition and communication;
- Performance management systems and training;
- Top executive performance management and pay administration services;
- Goal-setting training and communication; and
- Co-sourcing services.

A Bit More on Selected Rewards Services

Organizational and Employee Performance

- We help agencies improve service delivery in a number of areas, including finance and purchasing, human resources, risk management, and records management.
- Our services include organizational assessments, staffing analysis, engagement surveys, performance management, compliance audits, process improvement, and strategic planning.

Top Executive Pay and Performance

- We provide board members and elected officials with a logical and straightforward path to making objective decisions and achieving results.

Pay Program Management Co-Sourcing

- Tailored to the needs of individual organizations, our services meet a variety of needs our clients encounter each year. We help with regular and ad hoc market benchmarking and competitive assessments, pay program management – structure adjustments and job evaluation/grading changes, and budget preparation.

Value Definition and Communication

- We help clients create, communicate and socialize their value proposition to current and potential employees so they can recruit top talent and build true engagement.
- Our reward strategy process identifies value-added factors, helps prioritize human resource investment, explains different components of the employment relationship, and helps align rewards and organization performance.

III. Team Organization, Qualifications, and Experience

Our People Resources

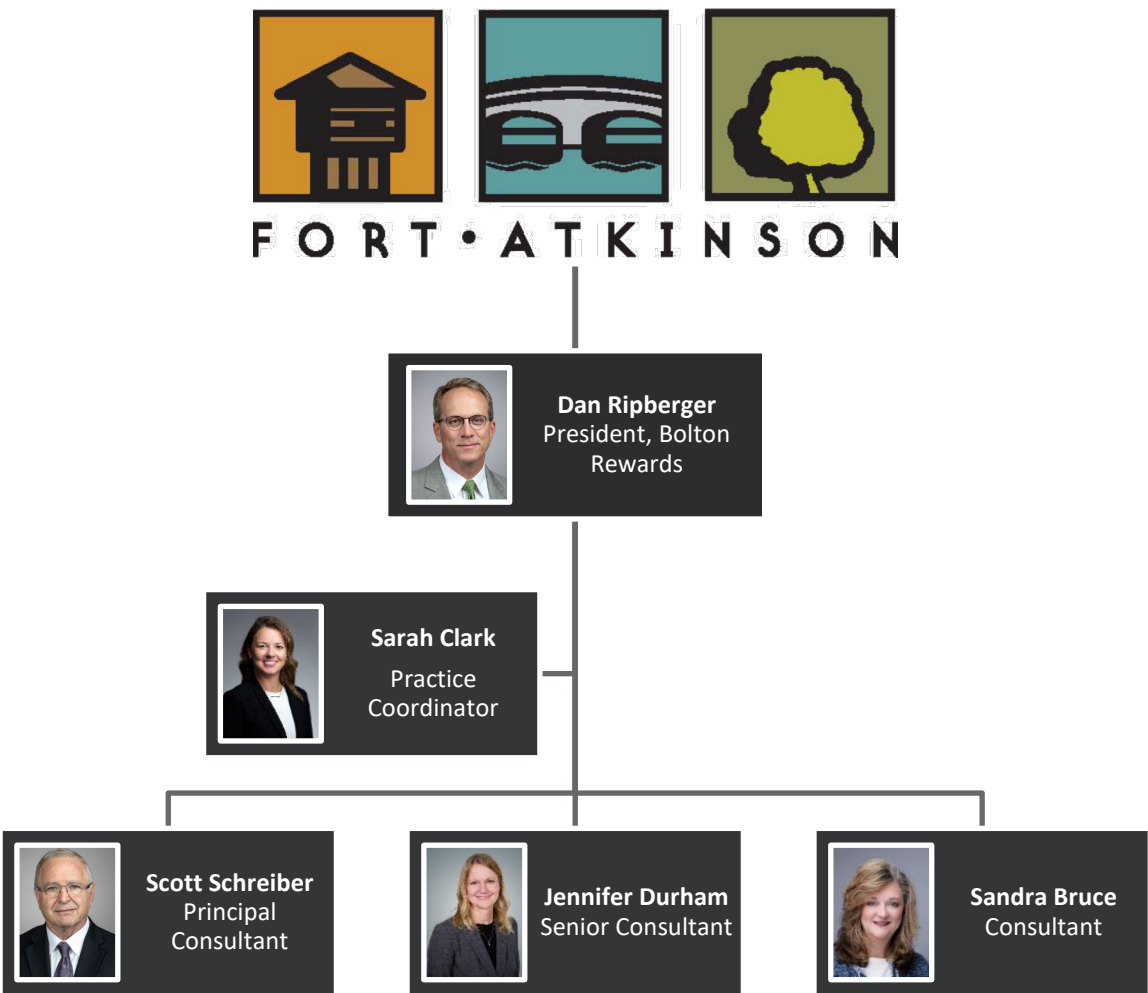
We envision an interactive relationship with Fort Atkinson management and project teams – working together, we deliver more creative and thorough solutions and work products.

Our team is built on a legacy of true expertise in total rewards stemming from some of the world’s largest consultancies and technical experts.

Fort Atkinson will be the ultimate owner of our engagement and we have assembled an engagement team of highly experienced consultants that understand Fort Atkinson, the type of talent it needs, and the markets in which it competes.

Assurance of Capacity

Our planned project team members have the resources available to fully meet the requirements of this project and will perform the services outlined in the RFP within the committed timeframe. As further assurance, Bolton Rewards maintains additional compensation consulting team members beyond the named project team and Bolton maintains a total staff compliment of over 125.



III. Team Organization, Qualifications, and Experience

Dan Ripberger, Engagement Manager

With 30 years of experience, Dan has a long history of maintaining successful client relationships and providing sound and effective compensation advice. Along with his expertise in job architecture, classification, and compensation, Dan is particularly adept in:

- Change management counsel and direction – Dan is an astute advisor regarding the change management implications of organization-wide compensation projects and helps clients predict and prepare for the financial and employee relations effects of process decisions and plan change decisions.
- Integrating total rewards – an early contributor to the concept of total rewards, Dan helps clients rationalize the value of their total compensation programs (health benefits, paid time off, retirement, etc.) to help guide the design of pay programs and communicate the value proposition to employees and managers.
- Securing the support of elected and employee leadership – by demonstrating an understanding of the viewpoints of various stakeholders, Dan effectively communicates the purpose of plan changes and the benefit of changes to the organization.

Over his career, Dan has advised clients of most types and sizes and has developed specialized knowledge of the mission-focused and public sector markets. He began his consulting career with Towers Perrin and Aon/Radford Associates. He went on to help found PRM Consulting and managed the consulting practices for MPI Consulting. Dan joined Bolton as a result of their acquisition of RSC Advisory Group, a niche compensation and total rewards consulting he helped found in Washington, D.C., and the Midwest.

He earned a bachelor's degree with concentrations in Economics and Human Resources from Xavier University. He maintains professional certifications from both WorldatWork and the Society for Human Resource Management.

III. Team Organization, Qualifications, and Experience

Scott Schreiber, Principal Consultant

Scott will serve as a consultant and technical advisor. With 30 years of experience, Scott Schreiber has a long history of maintaining successful client relationships and providing sound and effective compensation advice. Along with his expertise in job architecture, classification, and compensation, Scott specializes in:

- Job Evaluation systems across a wide variety of organizations.
- Developing alternative approaches to Classification Systems, Point Factor plans, Scored Questionnaires, as well as Market-Based Job Evaluation.
- Tailoring Bolton's job evaluation system to each client's needs.

Scott's public sector client assignments have been in a number of specific markets, including airports, counties, community colleges, municipalities, social service agencies, and utilities.

Previously, Scott served as the Midwest Compensation Practice Leader for Watson Wyatt out of their Cleveland office. Prior to that, Scott was a Principal and Practice Leader for William M. Mercer's Inc.'s Reward and Talent Management practice, President of a small industrial manufacturer, Senior Vice President of Human Resources of a large insurance company, and several other corporate and consulting roles.

Scott earned an MBA from Xavier University and a Bachelor of Arts from the University of Cincinnati.

Jennifer Durham, Senior Consultant

Jennifer Durham will serve as a consultant and project manager on our engagement. She is a seasoned professional with 25 years of collective corporate and consulting total rewards and human resources management experience.

Her most recent experience includes market pricing and analysis, job classification, job evaluation, custom surveys, and structure development. Jennifer is the lead administrator for Bolton's market surveys, such as our TRDx client-specific surveys.

Jennifer's public sector client assignments have been in a number of specific markets, including airports, counties, public safety agencies, municipalities, schools, social service agencies, and utilities.

Prior to joining Bolton, Jennifer was a senior analyst with RSC Advisory Group with a focus on market pricing and analysis, custom survey administration, and executive compensation. Prior to consulting, she served as Director, Human Resources for Sekisui XenoTech.

She has a Bachelor's degrees in both Accounting and Marketing from Kansas State University and holds senior professional certification through HRCI (SPHR).

III. Team Organization, Qualifications, and Experience

Sandra Bruce, Consultant

Sandra will serve as a consultant and classification specialist. With over 30 years of experience in consulting and public sector human resources, Sandra Bruce is a Consultant with Bolton specializing in public sector job analysis and classification.

Prior to her role at Bolton, Sandra served as a Senior Human Resources Consultant for the Georgia Department of Labor, focusing on classification and compensation reviews, COVID protocols, and strategic recruitment efforts. Prior to that, Sandra was the Human Resources Director for the Georgia Department of Defense, the state agency responsible for oversight and support of the Georgia Army and Air National Guard.

Sandra earned a Master of Public Administration and Bachelors of Arts degrees in Political Science and English. She has held her PHR certification since 2000.

Sarah Clark, Practice Coordinator

Sarah Clark is the Rewards Practice Coordinator where she works with project leaders and clients to meet project demands and complete important supportive projects and tasks.

Prior to joining Bolton, Sarah served as a Corporate Recruiter for a Logistics and Transportation Company where she sourced, selected and developed talent nationally. She also spent time as a Recruiter and Quality Assurance Specialist at a Candy and Gifting company.

She has a Bachelor's degree in Urban Studies within the College of Design, Art, Architecture, and Planning at the University of Cincinnati.

III. Team Organization, Qualifications, and Experience

Recent Client Examples

- Baltimore County, Maryland
 - Researched, analyzed and advised on total compensation and compensation and practices of eight collective bargaining units across 7 counties and the State of Maryland over a six-month period.
- City of Ada, Oklahoma
 - Reviewed and redesigned the City's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies. Reviewed and redesigned the City's performance system.
- City of Albany, Georgia
 - Reviewed and redesigned the City's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
- City of Dunedin, Florida
 - Reviewed and redesigned the City's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
- City of Fredericksburg, Virginia
 - Reviewed and redesigned the City's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
- City of Lakeland, Florida
 - Reviewed and redesigned job descriptions, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and establishing new pay ranges, classification grading and effective pay management policies.
- City of Laramie, Wyoming
 - Reviewed and redesigned the City's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
- City of Maitland, Florida
 - Reviewed and redesigned Maitland's job description, job evaluation, classification, and performance management plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.

III. Team Organization, Qualifications, and Experience

- City of Middletown, Ohio
 - Reviewed the City's job description, job evaluation, and classification plans. Conducted original market research of selected Cities and established new pay ranges to achieve desired external competitiveness.
- City of Port St. Lucie, Florida
 - Supported the City's contract negotiations with sworn public safety unions by conducting independent original market research of peer organizations.
- City of Riverdale Park, Maryland
 - Reviewed the City's job description, job evaluation, and classification plans. Conducted original market research of selected Cities and established new pay ranges to achieve desired external competitiveness.
- City of Suwanee, Georgia
 - Reviewed and redesigned the City's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
- City of Winter Park, Florida
 - Reviewed and redesigned the City's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
- City of Tacoma Park, Maryland
 - Conducted original market research of selected counties and municipalities and reviewed the market alignment of classifications, pay ranges and actual employee pay over a 5-month period.
- City of Wytheville, Virginia
 - Reviewed and redesigned the City's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
- Clay County Government, Florida
 - Reviewed and redesigned this 600-employee County's job description, job evaluation, and classification plans. Conducting original market research of selected cities and municipalities and establishing new pay ranges, classification grading and effective pay policies.
- Clay County Sheriff's Office, Florida
 - Reviewed and redesigned this 600-employee Sheriff's Office job description, job evaluation, and classification plans. Conducting original market research of selected cities and municipalities and establishing new pay ranges, classification grading and effective pay management policies.

III. Team Organization, Qualifications, and Experience

- Fond Du Lac County, Wisconsin
 - Reviewed and redesigned the County's job description, job evaluation, and classification plans. Conducted original market research of selected counties and established new pay ranges, classification grading and effective pay management policies.
- James City County, Virginia
 - Reviewed and redesigned the County's job description, job evaluation, and classification plans. Conducted original market research of selected counties and established new pay ranges, classification grading and effective pay management policies.
- Kenton County Airport/CVG, Kentucky
 - Reviewed KCAB/CVG's job description, job evaluation, and classification plans. Conducted original market research and established new pay ranges, classification grading and effective pay management policies. Reviewed and redesigned Police and ARFF roles into new Step pay structures.
- Northampton County, Pennsylvania
 - Reviewed and redesigned the County's job description, job evaluation, and classification plans. Conducting original market research of selected counties and municipalities and establishing new pay ranges, classification grading and effective pay management policies.
- Orange County Sheriff's Office, Florida
 - Reviewed and redesigned the Agency's job description, job evaluation, and classification plans for non-sworn personnel. Conducted original market research of selected peer organizations and established new pay ranges, classification grading and effective pay management policies.
- Prince George's Community College, Maryland
 - Reviewed the college's job description, job evaluation, and classification plans. Conduct market research of selected peer organizations to update pay ranges to achieve desired external competitiveness.
- Regional Income Tax Agency, Ohio
 - Reviewed and redesigned the Agency's job description, job evaluation, and classification plans. Conducted original market research of selected peer organizations and established new pay ranges, classification grading and effective pay management policies.
- Riverside Board of DD, Ohio
 - Conducted original market research of peer organizations as well as geographic companies to update base pay structure for desired market alignment.
- State of Maryland, Department of Legislative Services
 - Reviewed the Agency's job description, job evaluation, and classification plans. Conducted original market research of selected agencies and established new pay ranges to achieve desired external competitiveness

III. Team Organization, Qualifications, and Experience

- State of Maryland, Maryland Environmental Services
 - Reviewed and redesigned the Agency's job description, job evaluation, and classification plans. Conducted original market research of selected agencies and counties and established new pay ranges, classification grading and effective pay management policies.
- State of North Carolina
 - Conducted an extensive 6 month total compensation survey and market assessment of the State's LME/Managed Care organizations. Analyzed findings and prepared and presented recommendations to the state legislature.
- Wicomico County, Maryland
 - Reviewed and redesigned the County's job description, job evaluation, and classification plans over a 9-month period. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
- Wor-Wic Community College, Maryland
 - Reviewed the College's job description, job evaluation, and classification plans. Conducted original market research of selected colleges and communities and established new pay ranges to achieve desired competitive philosophy.

Current/Ongoing Projects

- City of Charlotte (Charlotte Douglas International Airport)
- City of Charlotte, North Carolina (Charlotte Water)
- City of Cleveland, Ohio (Cleveland Metroparks)
- City of Fort Myers, Florida
- City of Newark, Delaware
- City of Rockville, Maryland
- City of Westminster, Colorado
- Clay County Utility Authority, Florida
- Delaware County, Pennsylvania
- Delaware Municipal Electric Corporation
- Gloucester County, Virginia
- Laramie County Community College, Wyoming
- Santa Fe Community College, New Mexico
- Schoharie County, New York
- St. Joseph County, Michigan
- Stafford County, VA Public Schools
- State of Georgia, State Road and Tollway Authority
- Wicomico County, Maryland

III. Team Organization, Qualifications, and Experience

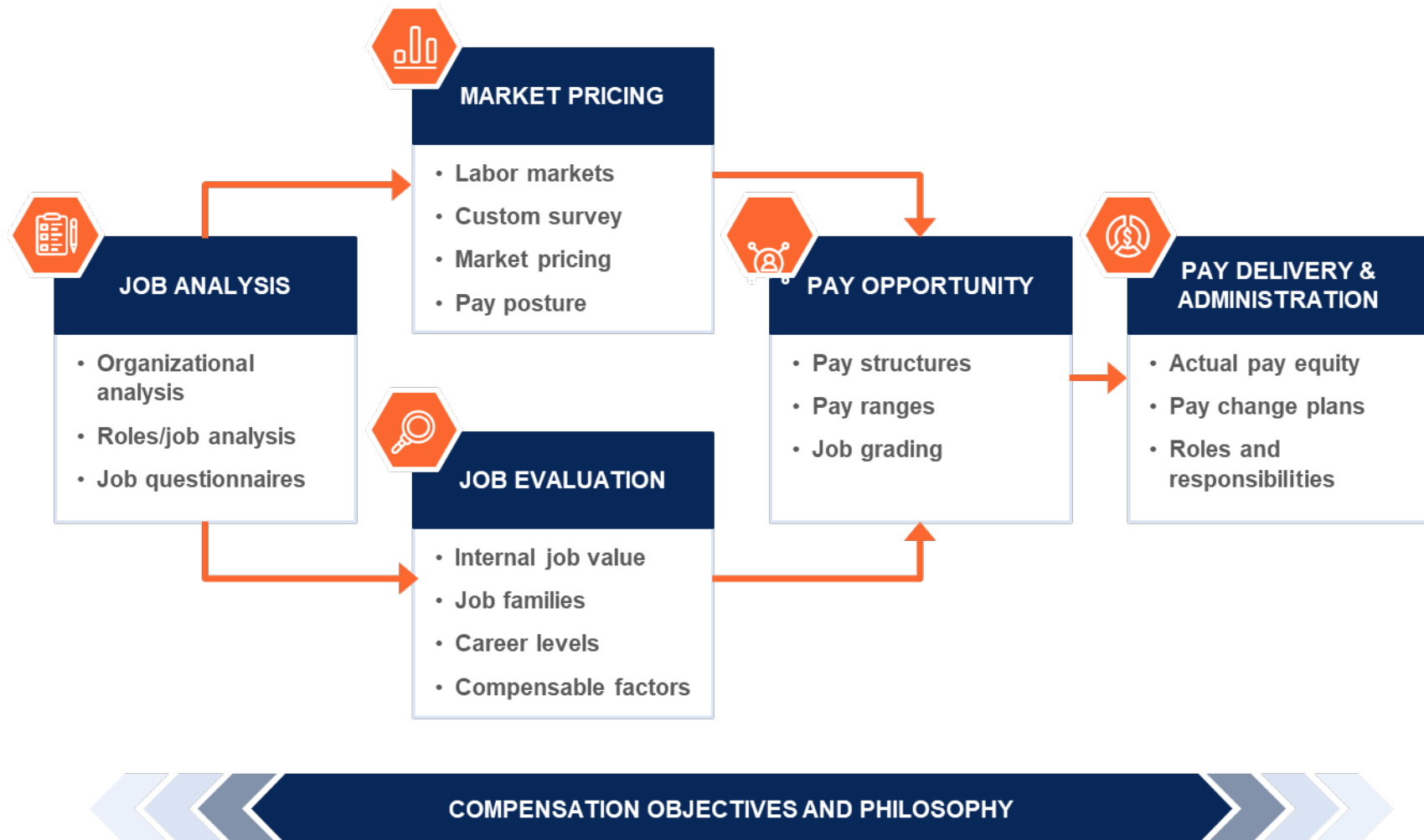
Selected References

Client	Project
City of Ada, Oklahoma Carl Turner Finance Director (580) 436-3600 carl.turner@adaok.com	Reviewed and redesigned the City's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies. Reviewed and redesigned the City's performance system.
City of Laramie, Wyoming Patti Russell Director, Human Resources (307) 721-5229 PRussell@cityoflaramie.org	Reviewed and redesigned the City's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
Fond du Lac County, WI Erin E. Gerred Director of Administration (920) 929-3156 Erin.gerred@fdlco.wi.gov	Review and redesign the County's job description, job evaluation, and classification plans. Conducted original market research of selected counties and established new pay ranges, classification grading and effective pay management policies.

IV. Project Approach and Preliminary Workplan

Assessment Approach and Process

We plan to employ our time-tested and systematic approach to review and, if needed, recommend changes to the City's classification and total compensation program.



III. Methodology and Study Implementation Plan

Phase 1: Project Planning and Discovery

Step 1: Project Planning

- We will kick off the project with a meeting among the Fort Atkinson and Bolton project teams to finalize engagement goals and scope and establish data needs, time milestones, and deliverables. Bolton will prepare data requests and assist with data collection, as needed, and will prepare a working project plan.

Step 2: Current Program Review

- Bolton will collect and internally review the organizational plan and policy documents, as well as previous assessments and analyses that describe the current compensation and benefits programs and their administration.
- We will meet with the HR team to ensure our full understanding of the current program.

Step 3: Communication Planning

- Should the City desire assistance communicating the study within the organization, we will help develop a communication plan. Our communication plan will help define key messages, specific audiences, the best media to use, and appropriate timing and milestones.
- We will provide template memo text/talking points for employee communication and can conduct an electronic project briefing session that can be recorded for ongoing use.

Step 4: Leadership Briefing

- Bolton will work with the City to brief leadership - elected officials, executives, and department heads on the project and desired outcomes.

Phase 2: Job Analysis and Evaluation

Step 1: Position Information Form Distribution (Optional)

- We will tailor our employee-completed Position Information Form (PIF) to gather position content data directly from employees. This questionnaire allows employees to effectively provide the detail necessary for us to conduct a professional review and determine further actions.
- We will prepare the PIF and work with the City to finalize its format – questions as well as media types, such as Microsoft Word form or online form. We will collaborate with the City to distribute and collect PIFs in the most efficient fashion.

Step 2: Job Description Review

- We plan to work with the City to collect existing job descriptions and review job content data (duties, responsibilities, and requirements) on all covered jobs.
- We will review both the format and the general language and text used within existing job descriptions.

Step 3: Functional Management Interviews

- We will interview department heads and other management to better understand the work of the City, how it is organized, and intended job results, to learn more about special talent considerations and labor market challenges, and to gather perceptions of the current program's effectiveness.
- Prior to and in preparation for our interviews, we will work with the City to request department heads complete our Functional Discovery Survey either online or via our tailored Microsoft Word form.

III. Methodology and Study Implementation Plan

Step 4: Job Title and System Review

- We also plan to review the use of job and position titles for internal consistency and market commonality.
- Typically, effective job titles have three components that are consistently applied:
 - Family or technical identification, such as Accounting, Construction, Equipment Maintenance, Planning, Recreation, or Water Treatment.
 - Name of the type of work completed, such as Analyst, Clerk, Coordinator, Manager, Engineer, Operator, Representative, Specialist, or Technician.
 - A designation for the level of work completed as part of a progression, if such a progression exists. The titles are sometimes indicated by numbers or letters or by specific labels, such as Associate, Entry, Staff, Senior, Principal, etc.

Step 5: Job Design and Evaluation

- We will first organize jobs into our Career Stream families. A family is a group of jobs having the same nature of work but requiring different levels of skill, effort, responsibility, or working conditions. Families are the first grouping to establish progressions of skill, knowledge, and responsibility across jobs and are essential to ensuring organizational consistency and equity.
- Career Stream levels are clearly differentiated levels within a family. The levels for each family are defined in terms of a “whole job” approach (i.e., all job dimensions are evaluated in the aggregate rather than on an individual basis).
- Bolton will review the City’s current system and job classification structure to assess its effectiveness in helping manage internal and external equity across the organization.

Step 6: FLSA and Other Legal Review

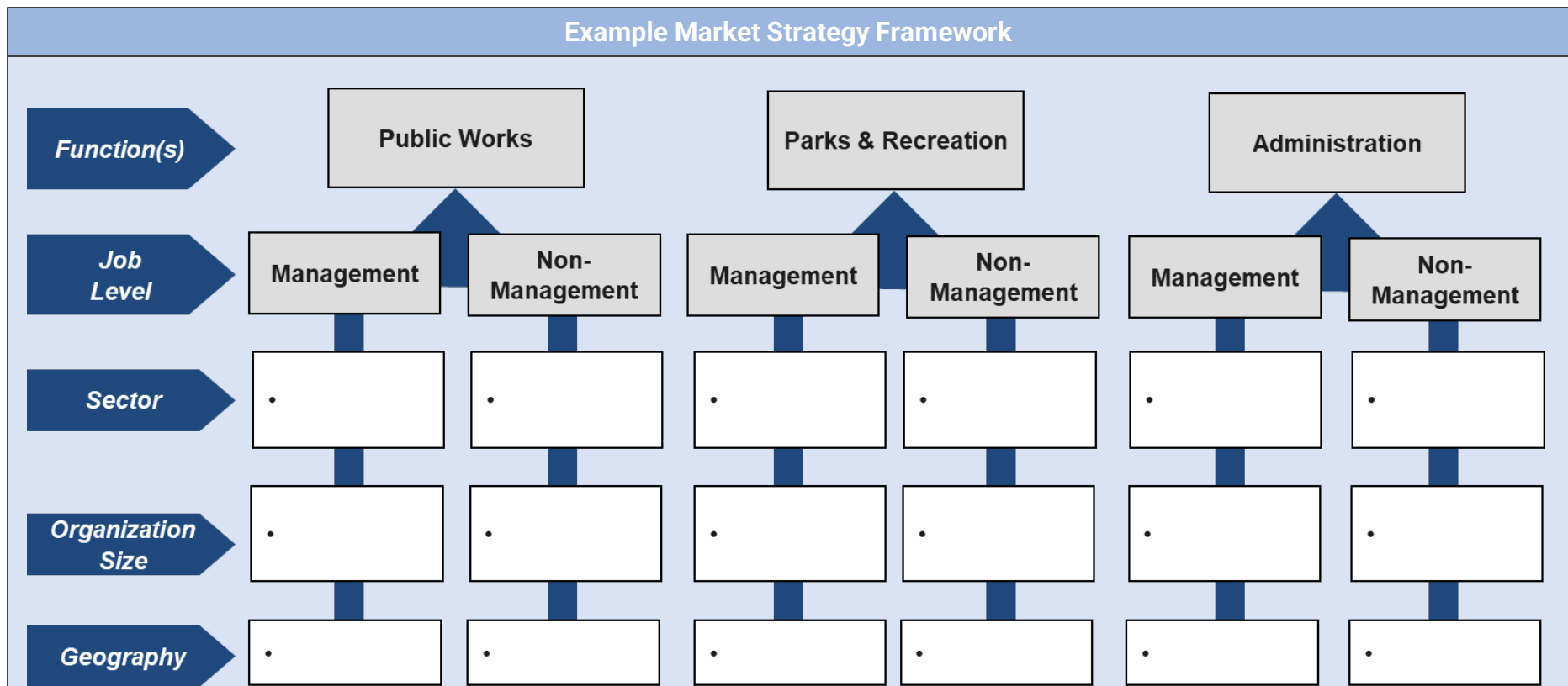
- Bolton will further review the City’s jobs to provide an opinion and guidance on classifications status with respect to the FLSA and EEO regulations.
- Specifically, we will apply Executive, Administrative, Professional, and or Computer exemption tests to determine exemption status on relevant jobs.

III. Methodology and Study Implementation Plan

Phase 3: Market Benchmarking

Step 1: Market Strategy

- Collaborate with the City to finalize the competitive labor market(s) that aligns with the feedback received from leadership and management, including specific peer organizations.
- The market strategy will identify sectors – public sector employers as well as private sector employers – with whom the City wants to compete for talent.
- It will also identify competitive differences based on the size of employers and their geographic location.



III. Methodology and Study Implementation Plan

Step 2: Custom Survey/Original Research

- Using our TRDx platform, we will conduct a custom survey of total compensation levels and practices survey of identified peers.
- Guided by Fort Atkinson's market strategy, we anticipate researching cities and counties in the region as well as private employers, if appropriate.
- We will work with Fort Atkinson to define the most appropriate contacts at each peer and a communication plan designed to gain maximum participation.
- The custom survey will require the completion of several distinct tasks:
 - Prepare survey package for review and approval;
 - Make initial contact with potential participants to generate interest;
 - Electronically distribute the questionnaire to the invitee list and monitor survey returns and follow-up;
 - Collect and review returned surveys, following up with questions or verification of reported data;
 - Aggregate and summarize reported data for use in our analyses; and
 - Produce and distribute a summary report for participants.

Step 3: Published Survey Analysis

- In addition, Bolton maintains an extensive library of published surveys and research that covers a wide array of market sectors, geographies, and job types. Our CompManager database has over 500,000 records of base and total cash compensation data.
- We will incorporate these data into our analyses, if needed, to represent desired labor markets.
- The results of our survey and supplemental market research will be summarized and presented as part of our subsequent gap analysis.

III. Methodology and Study Implementation Plan

Phase 4: Program Review Recommendations

Step 1: Gap Analysis

- After our analysis of background data, the strategy discussions with senior leadership, and interviews with department heads, Bolton will assess if/where gaps may exist between the City's objectives and the design and/or administration of its compensation system.
- Bolton will develop a series of conceptual recommendations to discuss and develop an overarching approach to subsequent work steps as well as the program design backdrop.
- After discussion with the City team, we will then finalize our review findings and recommendations.

Step 2: Job Title and Documentation Recommendations

- We will provide our recommendations resulting from our job analysis to include system tools and basic job-by-job editorial comments.
- During this step, Bolton will recommend changes to the job description and other document formats as well as develop a job title system.

Step 3: Structure and Classification Plan

- Bolton will employ the market data to develop base pay structures and ranges which are market competitive and aligned with the City's compensation philosophy and objectives.
- We will integrate the job evaluation results with the market data to develop and implement a job classification system that aligns internal equity with market competitiveness.
- Our recommendations will include guidelines for future structure adjustments and how the adjustments impact employee pay.
- These guidelines will allow the City to maintain its structures in a competitive position relative to the market over time.

Step 4: Employee Pay Equity and Delivery Analysis

- Once the revised structure(s) is/are in place and jobs have been classified and assigned to grades, Bolton will assess the competitiveness and equity of actual employee pay.
- We will use compa-ratios, range penetration, or other market alignment measures to assess the overall competitive alignment of employees' actual pay.
- Working with the City, we will also address wherein the pay range an employee should be paid relative to their performance over time in their specific job so that we can assess actual pay competitiveness and broader statistical trends or issues, such as career pay and pay compression.

III. Methodology and Study Implementation Plan

Step 5: Base Pay Increase/Total Pay Delivery Plan

- Total pay plan design/policy recommendations that align how employee pay gets changed over time with what the organization values. Typical adjustments include merit increases or promotional increases and we will expand our recommendations as requested by the City to include:
 - Premium pay policies (e.g., Acting Pay; Extra Duty Pay; Shift Differential, etc.);
 - Position Changes - Reclassification Increase;
 - New hiring rates and salary offer guidelines;
 - Promotions (percentages and timing of pay changes); and
 - Demotions and voluntary reassignments.

Step 6: Draft Reporting, Costing and Planning

- We will prepare a comprehensive draft report of our methodology, review findings, and recommendations for discussion with Fort Atkinson Administration and Human Resources.
- We will work with the City to determine appropriate implementation approaches, including strategies for fixing any pay inequities that arise from the study, the new structures, and how jobs are graded.

Phase 5: Reporting and Implementation

Step 1: Final Reporting, Approval, and Policy Updates

- Based on discussions with the City, we will incorporate agreed-upon changes and prepare a final report targeted for public disclosure.
- Should it be desired by the City, Bolton will present the study report or a summarized version to leadership and/or elected officials.

Step 2: Implementation and Communication

- We will also work with the City to determine appropriate implementation approaches, including strategies for fixing any pay inequities that arise from the study, the new structures, and how jobs are graded.
- Major tasks we expect to complete include reviewing, editing, and finalizing policies; developing an implementation and communication plan for Fort Atkinson use; working with HR to orient managers to the new systems; and transferring tools and resources to HR and provide training on their ongoing use.

Ongoing Administrative Support

- Once all changes have been implemented and the policies and tools turned over to the City, Bolton will provide cost-effective ongoing administrative services.
- Services that are commonly provided include:
 - Annual budgeting and structure updates;
 - Group or individual job reorganization and classification;
 - Special surveys of peer pay level and/or practices; and
 - Tailored trend and practice updates.

V. Timing and Fees

Projected Timing

We are prepared to begin immediately upon receiving formal authorization to proceed. We estimate it will take 12 to 16 weeks from the project initiation meeting to review and update the City's classification and compensation program. This assumes that the City will provide us with the requested background materials in a timely manner, schedule meetings reasonably, and make approval decisions within the timing of the engagement.

Fees and Billing

We will charge an all-inclusive flat fee of \$35,000 to complete all objectives outlined in our proposal. This fee includes all labor, materials, travel-related expenses, and all related costs based on the defined project scope.

Major pricing assumptions:

- The study will all employees in approximately 45 unique job titles.
- We plan to work with leadership and HR to define a market strategy and develop and list of survey peers.
- We will interview department heads to engage on cultural competencies and the unique aspects and needs of the City. We will also ensure work process understanding and gather their input on jobs and the compensation program.
- We will utilize existing job descriptions to gather required job content data. The use of employee-completed questionnaires is optional.
- The market survey will cover total compensation levels and practices using Bolton's TRDx from up to 20 survey invitees identified by the City and Bolton. We will also develop rates at the 25th, 50th, and 75th percentiles from our library of published data sources on as many jobs as possible.
- We typical bill monthly as work tasks are completed but are open to working with the City to conform to their billing policies and procedures.
- Our pricing is good for 120 days from the date of the proposal.

Bolton

Classification and Compensation Study



Proposed Consulting Services

Appendix

April 18, 2025

Appendix: Bolton Public Sector Clients

Anne Arundel Community College, MD
Anne Arundel County, MD Government
Anne Arundel County, MD Public Library
Baltimore County, MD Government
Baltimore County, MD Public Schools
Baltimore County, MD Revenue Authority
Bedford County, VA
Bedford County, VA Public Schools
Bedford Regional Water Authority
Broward County, FL
Buffalo, NY Public Schools
Calvert County, MD
Calvert County, MD Public Schools
Caroline County, MD Board of Education
Caroline County, MD Government
Caroline County, MD Public Schools
Carroll County Community College, MD
Carroll County, MD
Carroll County, MD Public Schools
Cattaraugus County, NY
Cecil County, MD Commissioners
Cecil County, MD Government
Cecil County, MD Public Schools
Charles County, MD Government
Charles County, MD Public Schools
Charles County, MD Sheriff's Office
Charlotte-Mecklenburg, NC Schools
Chatham County, GA
Cherokee County, GA
Chesapeake, VA Public Schools
Chicago Regional Transportation Authority
City of Ada, OK
City of Austin, TX
City of Albany, GA
City of Baltimore, MD
City of Boca Raton, FL
City of Bowie, MD
City of Cambridge, MD
City of Cape Coral, FL
City of Chesapeake, VA
City of Cocoa, FL
City of Doral, FL
City of Dover, DE
City of Dunedin, FL

City of El Paso, TX
City of Flagler Beach, FL
City of Fond du Lac, WI
City of Fort Myers Shores, FL
City of Frederick, MD
City of Fredericksburg, VA
City of Gaithersburg, MD
City of Greenbelt, MD
City of Griffin, GA
City of Hialeah Gardens, FL
City of Hollywood, FL
City of Hyattsville, MD
City of Lake Mary, FL
City of Lakeland, FL
City of Laramie, WY
City of Laurel, MD
City of Lexington, VA
City of Maitland, FL
City of Manassas, VA
City of Manassas, VA Public Schools
City of Melbourne, FL
City of Miami Gardens, FL
City of Middletown, OH
City of Miramar, FL
City of New Smyrna Beach, FL
City of New York, NY
City of Newark, DE
City of North Fort Myers, FL
City of Norwich, CT
City of Orlando, FL
City of Palm Beach Gardens, FL
City of Pittsburgh, PA
City of Plainfield, NJ
City of Pocomoke, MD
City of Pompano Beach, FL
City of Providence, RI
City of Reading, PA
City of Riviera Beach, FL
City of Rockville, MD
City of Salisbury, MD
City of Sanford, FL
City of Sarasota, FL
City of Takoma Park, MD
City of West Palm Beach, FL

City of Westminster, MD
City of Wilmington, DE
City of Winchester, VA
City of Winter Park, FL
Clay County Board of Commissioners, FL
Clay County Sheriff's Office, FL
Clay County, TX
Columbia County, FL
College of Southern Maryland
Colorado Department of Health Care
Community College of Baltimore County
County of Albemarle, VA
County of Culpeper, VA
County of Hawaii, HI
County of Lancaster, PA
Coweta County, GA
Culpeper County, VA Schools
Dawson County, GA School System
Delaware River & Bay Authority
Delaware Transit Corporation
Department of Justice
Dinwiddie County, VA
Dinwiddie County, VA School Board
District of Columbia Retirement Board
Dorchester County, MD
Dorchester County, MD Board of Education
Eastern Iowa Airport (CID)
Eastern Shore of Maryland
Emerald Coast, FL Utilities
Employees Retirement System of Texas
Fauquier County, VA
Florida Department of Financial Services
Fond du Lac County, WI
Fort Myers Shore Fire, FL
Frederick Community College, MD
Frederick County, MD Government
Frederick County, MD Public Schools
Frederick County, VA Government
Frederick County, VA Public Schools
Garrett County, MD Government
Garrett County, MD Public Schools
Gloucester County, VA
Hallandale Beach, FL
Hampton Roads, VA Sanitation

Appendix: Bolton Public Sector Clients

Hanover County, VA Government
Harford Community College, MD
Harford County, MD
Harford County, MD Public Library
Harford County, MD Public Schools
Harford County Sheriff's Office, MD
Hazleton City, PA Pension Board
Higher Ground Education
Highlands County, FL
Housing Authority of Baltimore City, MD
Howard Community College
Howard County, MD Government
Howard County, MD Library
Howard County, MD Public School System
Indian Trail Improvement District
Inter-University Council of Ohio
Ithaca City, NY School District
Jacksonville, FL Transportation Authority
James City County, VA
Kent County, MD Government
Kent County, MD Levy Court
Kent County, MD Public Schools
Kenton County Airport Board (CVG)
King George County & Schools, VA
King William County, VA
Lake Worth, FL Drainage District
Lehigh Acres, FL Fire Control
Loudoun County, VA Public Schools
Loudoun County, VA Sanitation Authority
Lower Merion Township, PA
Macon-Bibb County, GA
Manassas Park, VA City Schools
Manatee County, FL
Maryland Dept of Legislative Services
Maryland State Retirement Agency
Metropolitan Water Reclamation
Milwaukee County, WI
Monroe County, FL
Montgomery County, MD Council
Montgomery County, MD Government
Montgomery County, MD Public Schools
New Hampshire Public Employees
New Horizons Regional Education Center
New Jersey Transit Corporation

New Kent County, VA Public Schools
New York Power Authority
New York State Thruway
Newport News, VA Public Schools
Niagara Frontier Transportation Authority
Northampton County, PA
North Fort Myers, FL Fire District
Ocean County, NJ Utilities Authority
Oneida County, NY
Orange County, VA
Oswego City, NY School District
Palm Harbor, FL Fire Rescue
Pennsylvania State Education
Philadelphia, PA Parking Authority
Port LaBelle, FL
Postal Regulatory Commission
Prince George's Community College MD
Prince George's County, MD Government
Prince George's County, MD Schools
Prince William County, VA Schools
Prince William County, VA
Queen Anne's County, MD Board of Education
Queen Anne's County, MD Government
Queen Anne's County, MD Public Schools
Rappahannock County, VA
Rappahannock County, VA Public Schools
Regional Income Tax Agency
Roanoke County, VA
Roanoke County, VA Public Schools
Rockingham County, VA Government
Rockingham County, VA Public Schools
San Jose Police Officers Association, CA
San Luis Obispo County, CA Pension Trust
Santa Rosa County, FL
School District of Philadelphia, PA
Shenandoah Valley Juvenile Center
Somerset County, NJ Board of Education
South Central Wastewater
South Florida Conservancy District
Spotsylvania County, VA Government
Spotsylvania County, VA Public Schools
St. Lucie County, FL Fire District
St. Mary's County, MD Government
St. Mary's County, MD Library

St. Mary's County, MD Public Schools
St. Mary's County, MD Sheriff's Office
Stafford County, VA Government
Stafford County, VA Public Schools
State of Alaska
State of Maine
State of Maryland
State of Montana
State of Oregon
State of West Virginia
State of Wisconsin
Stevenson University
Suffolk County Community College, NY
Talbot County, MD
Talbot County, MD Board of Education
Thomas County, GA School District
Town of Centerville, MD
Town of Chestertown, MD
Town of Colmar Manor, MD
Town of Cutler Bay, FL
Town of Davie, FL
Town of Edison, NJ
Town of Elkton, MD
Town of Juno Beach, FL
Town of Kilmarnock, VA
Town of Leesburg, VA
Town of Mount Airy, MD
Town of Ocean City, MD
Town of Orange, VA
Town of Riverdale Park, MD
Town of Sykesville, MD
Town of Thurmont, MD
Town of University Park, MD
Town of Wytheville, VA
Upper Occoquan Service Authority
Vernon-Verona Sherrill Central Schools, NY
Village of Oak Park, IL
Village of Royal Palm Beach, FL
Washington County, FL
Washington County, MD
Washington County, MD Public Schools
Washington Suburban Sanitary Comm
West Virginia Municipal Pension Oversight Board
West Virginia State Police

Appendix: Bolton Public Sector Clients

Wicomico County, MD Board of Education
Wicomico County, MD Government
Williamsburg-James City, VA Schools
Worcester County, MD Board of Education
Wor-Wic Community College, MD

Again Proposal for Classification and Compensation Study/Plan for the City of Fort Atkinson



Prepared by
Public Administration Associates, LLC

April 16, 2025



Public Administration Associates, LLC



Public Administration Associates

April 16, 2025

Re: Proposal for Classification and Compensation Study (City of Fort Atkinson Positions)

Sarah Weihert
Public Relations Executive Assistant
City of Fort Atkinson
Municipal Building
101 N. Main Street
Fort Atkinson, WI 53538

Dear Ms. Weihert:

On behalf of Public Administration Associates, LLC (PAA), I am pleased to submit the following proposal for the City of Fort Atkinson's consideration that addresses your desire for an updated wage and compensation study/plan to include 32 separate municipal position classifications (a total of approximately 68 full-time employees).

As you may be aware, PAA has specialized in working with smaller municipalities in Wisconsin on organizational audits/management reviews, executive recruitment, and human resource-related studies since its founding in 1998. We are currently working on classification/compensation studies for the cities of Berlin and Sturgeon Bay, as well as the Village of Somers, however, we are completing several of these studies in the next few weeks and can take on additional work. We have a track record of success, and we encourage you to contact any of the 200-plus Wisconsin cities, counties, villages, and towns that we have served.

PAA would be extremely privileged and honored to work with the City of Fort Atkinson. We know that our PAA partners and associates who will work with the City on this project can provide significant value to your organization based on their extensive municipal experience and expertise.

Sincerely,

Kevin M. Brunner

Kevin M. Brunner
President

cc-David Tebo, PAA Associate
Emily McFarland, PAA Associate
Karl Frantz, PAA Associate

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 their clients, and the efficient use of client time and resources. PAA has built a sterling reputation earned from 27-plus years of municipal consulting and a combined 300+ years of public management experience.

A New 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 2019, Kevin Brunner was joined by David Bretl and Christopher Swartz as partners of the firm. In early 2025, Swartz became a Senior Associate of the firm, and Susan McDade and Shawn Murphy became new partners with Brunner and Bretl. Brunner currently serves as the firm's president, while Bretl serves as CEO/General Counsel, with McDade serving as vice-president and Murphy serving as Secretary/Treasurer.



Kevin Brunner-President/Partner

Kevin Brunner has over forty 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 recently stepped down after a six-year stint as chair of the Geneva Lake Conservancy, one of Wisconsin's largest land trusts. Brunner has been actively consulting with PAA since 2014.



David Bretl- Interim CEO/Legal Counsel

David Bretl has served local governments in Wisconsin for the past thirty-five years. He retired in early 2020 from his position as County Administrator and Corporation Counsel for Walworth County, a combined position that he had held since 2003. He 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.



Sue McDade – Vice President

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 parkland. 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.



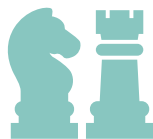
Shawn Murphy – Secretary/Treasurer

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's Degree in Business Administration from the University of Wisconsin-Eau Claire in 1986 and his 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.

Mr. Murphy works on interim management assignments and executive recruitment projects for PAA.

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 in establishing and implementing economic development projects and programs, including downtown revitalization initiatives, redevelopment, 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 the development of boundary agreements and cooperative plans.

I. Proposed Methodology and Scope of Work

PAA is aware that the City of Fort Atkinson has solicited proposals for the preparation of an updated Classification and Compensation Study that will evaluate current salaries and fringe benefits for 32 City positions. In addition, current job descriptions are to be updated, and recommendations are to be made regarding Fair Labor Standards Act (FLSA) exempt/non-exempt status to be made as part of the Study.

It is PAA's understanding that the represented members of the Fort Atkinson Fire and Police Departments will not be part of the scope of this Study. Further, it is understood that a review of current fringe benefits is not a part of the expected work.

The purpose of the study is to ensure the City maintains a competitive standing with other similar government employers with a compensation system that is attractive, equitable, and effective. In addition, potential pay compression issues will be identified, with alternative solutions to be provided.

The general scope of work for the proposed study would consist generally of the steps listed below and can be fine-tuned and refined after meeting with City representatives at the initiation of the project:

A. Review and analyze relevant organizational values and concerns. Determine current organizational needs concerning the updating of the current Fort Atkinson wage and compensation system.

PAA takes very seriously the importance of understanding current organizational values, needs, and concerns. PAA has found in its studies that each organization has a different set of values and concerns affecting the design of the classification and compensation system. Organizational information will be obtained through discussions with the City Manager, staff, and/or City Council members if needed. Other important historical background materials will be reviewed that may have a bearing on an updated wage comp study, such as upcoming referendums, budgets, personnel policies, past plans, etc. After discussion with the City Manager and other key staff to determine what issues might have arisen in the past, PAA will provide recommendations and options for ways the City could move forward.

B. Engage employees in the process through a written explanation of steps for the Classification and Compensation Study and an Employee Job Questionnaire. Allow for individual input and communication with project consultants.

We are sensitive to the fact that classification and compensation plans require buy-in from employees. Important information for PAA's evaluation of internal equity between positions is gained through the Employee Job Questionnaire and conversations with employees.

C. Review and recommend revisions to position descriptions.

PAA will review each position description and verify with each employee that the position description accurately and completely describes the current work being done and the requirements for the position. We utilize a survey form conforming to established human resource information standards to be completed by each employee. All discrepancies listed by employees are noted and any proposed changes will be documented for the City. It is expected that many of the position descriptions may need substantial updating and that cost is reflected

in our proposal. PAA, as part of its final report, will provide updated job descriptions for all 32 positions to be studied.

D. Rank all positions using a point factor approach to determine internal position evaluation.

The internal position evaluation consists of eight factors that are weighted: knowledge/education (20%), experience (20%), job complexity (20%), supervision exercised (10%), supervision received (10%), consequences of decisions (10%), interaction with other sets of people (5%), and work environment (5%). The internal evaluation is based upon a thorough review of position descriptions and responses to the Employee Job Questionnaire.

E. Establish an external peer group of 12-16 communities from which to obtain salary and benefit information for all designated positions.

PAA develops the market peer group of communities and comparability factors in consultation with the City. Factors typically compared include regional proximity, municipality size, organizational complexity, number of FTE's, equalized value, and per capita spending. Where appropriate private market data are available, they will also be used. PAA will create a survey instrument for City approval that will capture the wage and benefit data they feel is most important to compare positions equitably across peer municipalities.

F. Develop a wage range midpoint for each benchmark position surveyed and optional wage ranges for consideration by the City at .8-1.20, .85-1.15, and .9-1.10 of the midpoint.

One of the challenges confronting consultants in external compensation surveys is dealing with peer municipalities that have salary ranges and those that have single-point salaries without ranges. PAA uses a special methodology to capture both kinds of data, enabling the calculation of what is termed the **external midpoint**. We then establish a **working range**, consisting, for example, of 80% to 120% of the external midpoint. This is a commonly used range for municipalities. The actual range that is used depends on decisions by the community. PAA will calculate several working ranges using different minimum to maximum spreads.

G. Identify various pay plan options. Discuss with community leadership the issue of pay progression with appropriate consideration for both length of service and performance. Make recommendations based on the identified pay philosophy, feasibility, and affordability.

We believe that the performance evaluation of every employee should be conducted by a municipality. However, we recognize that there are different perspectives on the relationship of performance evaluation and salary/wage adjustments. Systems range from what we describe as loosely linked evaluation to salary approaches to tight pay for performance approaches. If desired by the City, we will offer options for how they might structure a compensation plan moving forward.

H. Recommend final pay ranges for the requested 32 positions that are consistent with the municipality's pay policy, internal equity scores, and reflect appropriate pay and benefit compensation practices for employees at these levels.

I. Prepare a written report for the City outlining the findings of the compensation survey and an implementation plan for proposed changes;

- J. Conduct compensation appeals following the adoption of a new updated Plan by the City. Appeals must be submitted within 30 days of plan adoption.*

II. Schedule for Comprehensive Wage/Compensation Analysis

Public Administration Associates, LLC can begin this project in early May, 2025. Based on the time-sensitive nature of compiling the wage and compensation data and to coordinate with the current PAA project workload, we recommend a two-phase approach.

Phase 1: (Estimated Completion Date- July 1)

Early May-July 1: Meet with City Manager (and other appropriate City officials) to prepare information about potential peer communities, establish criteria for comparisons, prepare wage and benefit surveys for approval, send out to peer communities, and follow up to ensure adequate participation and accurate comparisons. Collect and input data. Compute wage medians and prepare potential updated wage ranges for City review. Identify potential pay compression issues and provide alternative solutions.

Phase 2: (Estimated Completion Date-September 1)

July 1-September 1: Meet with employees to discuss the purpose of a wage/comp study and review job questionnaires. Receive job questionnaires from employees. Conduct employee interviews where necessary. Create job descriptions if requested and included in the scope of our work. Review data with City Manager and get agreement on approach for final study presentation. Finalize data, write report, and prepare for study presentation to City Manager, City Council, and affected City Staff. Present findings in final report to the Fort Atkinson Finance Committee and City Council.

III. Employee Involvement

PAA may request information from Fort Atkinson as we research background materials and historical documents related to the Classification/Comp Study. We will need employees to prepare a job description questionnaire and to participate in requested information sessions. Department heads may be involved in reviewing position description information. All external data and all analysis of internal and external data will be the responsibility of the PAA consultants.

IV. Meetings and Presentations (In-Person or Zoom if Needed)

PAA agrees to work closely with the City Manager and other City officials (including the Finance Committee) and keep them updated on study progress. There will be a minimum of three official visits (in-person or zoom) by our consultants to Fort Atkinson: (1) An initial visit which would include-Meeting with the City Manager, and any other requested participants to formally initiate the Fort Atkinson Classification/Comp study project; (2) A second visit to include a meeting with all employees to discuss the purpose of the study and review job questionnaires; 3) A third visit for a formal presentation to the Finance Committee and/or full City Council, City Manager and City staff members once the plan is completed to answer any questions about final study recommendations.

V. Proposed Fee Structure for Services

Phase 1: (Estimated Completion Date- July 1)

Meet with the City Manager (and appropriate City Finance Committee if desired) to prepare information about potential peer communities, establish criteria for comparisons, prepare wage and benefit surveys for approval, send out to peer communities, and follow up to ensure adequate participation and accurate comparable municipalities. Collect and input data. Compute wage medians and prepare potential updated wage ranges for City review.

Estimated Cost for Phase 1 = 100 hours x Consultant Fees of Avg. \$105.00/hr. = \$10,500.00

Phase 2: (Estimated Completion Date- September 1)

Meet with employees to discuss the purpose of a wage/comp study and review job questionnaires. Receive job questionnaires from employees. Conduct employee interviews where requested or necessary. Update all job descriptions based on job questionnaires and employee interviews conducted. Review data with City Manager and get agreement on approach for final study presentation. Finalize data, write report, and prepare for study presentation to Mayor, City Council, City Manager, and City Staff.

Estimated Cost for Phase 2 = 125 hours x Consultant Fees of Avg. \$105.00/hr. = \$13,125.00

Allowance for Consultant Travel/Project Expenses-\$900

Total Not-to-Exceed Cost for Complete Study and Compensation Step Plan (including travel/mileage) = \$24,525.00

Quote good until May 1, 2025

Relevant Experience

Public Administration Associates, LLC, specializes in organizational and administrative studies for smaller municipalities in Wisconsin as well as municipal executive recruitment and strategic planning.

Organization and Management Studies Performed by PAA for Wisconsin Municipalities (Last Five-Year Period)

- Classification/Compensation Study, Village/Town of Somers, 2025
- Classification/Compensation Study, City of Sturgeon Bay, 2025
- Classification/Compensation Study, City of Berlin, 2025
- Municipal Consolidation Study, Village and Town of Stockbridge, 2025
- Fire Consolidation Negotiations, City of Waupun and Towns of Chester and Waupun, 2025
- Fire/EMS Consolidation Study, City of Hurley & Northern Iron County Towns, 2025
- Fire/EMS Consolidation Study, Town and Village of Sharon, 2025

- Fire/EMS Consolidation Study, City of Rhinelander & Town of Crescent, 2025
- Classification/Compensation Study, Village of Union Grove, 2024
- Fire/EMS Consolidation Study, Town of Troy/Village of East Troy, 2024-2025
- Municipal Governance Workshop, City of Burlington, 2024
- Fire/EMS Consolidation Study, Town of Linn/City of Lake Geneva, 2024
- Fire/EMS Staffing Study, City of Menomonie, 2024
- Fire/EMS Organizational Study, City of Ripon, 2024
- Classification/Compensation Study, Town of Freedom, 2024
- Fire/Organizational Study, Village of Fontana, 2024
- Fire/EMS Organizational Study, City of Waupun, 2024
- Organization/Governance Study, Village of Maple Bluff, 2024
- Organizational Audit/Staffing Study, Town of Rome, 2024
- Railroad ROW Study, Village of Germantown, 2024
- Classification/Compensation Study, Village of Campbellsport, 2023
- Classification/Compensation Study, Village of Weston, 2023
- Classification/Compensation Study, Village of Dane, 2023
- Fire/Organizational Study, Village of Williams Bay, 2023
- Wage/Compensation Study, Village of Belleville, 2023
- Fire/EMS Organizational Study, City of Lake Geneva, 2023
- Fire/EMS Organizational Study, Town of Linn, 2023
- Classification/Compensation Study, Village of Shorewood Hills, 2022
- Classification/Compensation Study, Walworth County Metropolitan Sewerage District 2022/
Update 2024
- Fire/EMS Organizational Study, City of Park Falls, 2021
- Fire Department Organizational Study, Village and Town of Cottage Grove, 2021
- EMS Operational Study, Deer Grove EMS District, 2021
- DPW Organizational/Staffing Study, City of Columbus, 2021
- DPW Organizational and Planning Study, Village of Kronenwetter, 2021
- DPW Organizational Analysis; Village of Waunakee, 2020-21
- Organizational Study, Town of Little Suamico, 2021
- Organizational Audit/Staffing Study, Village of Hortonville, 2020
- Classification/Compensation Study Update, City of Mauston, 2020
- Fire Department Organizational Study/Space Needs Analysis, City of Platteville, 2020
- County Administration Study, Sauk County, 2020
- Fire/EMS Organizational Study, Village of Little Chute, 2019-2020
- DPW Organizational Analysis/Staffing Study, Village of Germantown, 2020
- Classification/Compensation Study, City of Park Falls, 2020
- Organizational Audit/Staffing Study and Employee Personnel Policies, City of Park Falls, 2020
- City of Marinette Legal Services Study/Reorganization, 2020
- Organizational Audit/Staffing Study, Village of Port Edwards, 2020
- Organizational Audit/Staffing Study and Employee Personnel Policies, Village of Merton,

2019

- Organizational Audit/Staffing Study, Town of Osceola, 2019
- Organizational Audit/Feasibility Study for Creation of City Administrator Position, City of Mineral Point, 2019
- Streetlighting Fee Feasibility Study, City of Oak Creek, 2019
- Classification/Compensation Study, City of Sturgeon Bay, 2019
- Organizational Audit/Feasibility Study for Creation of City Administrator Position, City of Park Falls, 2019
- Organizational Audit and Classification Study, Town and Village of Somers, 2019
- Lodi Fire/EMS District Organization and New Station Location Study, 2019
- Employee Personnel Manual Development, Village of Williams Bay, 2019
- Community Collaboration Planning Project- Cities of Marinette and Menominee, MI, 2019

References from Recent Comparable Municipal Consulting Projects

Jessi Balcom, Administrator, City of Berlin, 920-361-5400, Classification/Compensation Study, Current 2025 (June Completion)

Justin Carlson, Administrator, Town of Freedom, 920-788-4548, Wage and Compensation Study, Completed May 2024

Jami Gebert, Administrator, Village of Weston, 715-359-6114 (Ext. 2610), Wage and Compensation Study, Completed October 2023

Teresa Hughey Groves, Clerk-Treasurer, Village of Dane, 608-849-5422, Wage and Compensation Study, Completed September 2023

John Imes, President, Village of Shorewood Hills, 608-800-9920, Wage and Compensation Study, Completed June 2022

Neal Kolb, Administrator, Walworth County Metropolitan Sewerage District, 262-728-4140, Wage and Compensation Study, Completed, July 2022/Update April, 2024

Charlie Kudy, Administrator, Village of Campbellsport, 920-533-8321, Wage and Compensation Study, Completed September, 2023

Connor LaPointe, Administrator, Village of Union Grove, 262-878-1818, Classification/Compensation Study/Plan; Completed November, 2024

Jason Peters, Administrator, Village and Town of Somers, 262-859-2822, Classification/Compensation Plan, Completed January 2020, Current 2025 Update July Completion)

Josh Van Lieshout, Administrator, City of Sturgeon Bay, 920-746-2900 (O) Wage and Compensation Study, Completed December 2019/2021/2025 Update

Qualifications of PAA Consulting Team for City of Fort Atkinson Classification/Compensation Study

PAA will assign an interdisciplinary team to work with the City on this consulting assignment. Kevin Brunner will serve as Lead PAA Partner, and Dave Tebo will be the Project Leader. In addition, PAA Associates Emily McFarland and Karl Frantz will work as Principal Consultants on the Fort Atkinson project.

Lead PAA Partner



Kevin Brunner-President/Partner

Kevin Brunner has over forty 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. Brunner has worked on over 25 local government classification/compensation projects for PAA.

Project Leader



Dave Tebo – Associate

Dave Tebo served as a Municipal Administrator in Wisconsin for over 30 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 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.

Dave works on interim management assignments, executive recruitment, and classification/compensation studies for PAA. He has completed approximately 20 classification/compensation projects with PAA.

Project Consultant



Emily McFarland- Associate

Emily McFarland has worked in government for the last 18 years. Throughout her career, she has worked at every level of government. Her career experiences have allowed Emily to have a unique understanding and practice in maneuvering through federal, state, county, and local government. Throughout her career, Emily worked for the United States House of Representatives, the Green Lake County Health and Human Services Department, the State of Wisconsin Department of Administration, the State of Wisconsin Department of Children and Families, and she served six years as the full-time Mayor of Watertown. Before she was elected Mayor, she served as a Watertown Alderperson for five years. Emily served as the President of the Wisconsin Urban Alliance and as a Board Member for the Wisconsin League of Municipalities. Emily holds a bachelor's degree in Political Science from Carthage College and a master's degree in Public Administration from UW-Oshkosh.

Emily works on a variety of municipal consulting projects for PAA.

Project Consultant



Karl Frantz-Associate

Karl Frantz has over 35 years of municipal management experience, including 30 years as an administrator in the state of Wisconsin. Frantz obtained his bachelor's degree in Political Science from the University of Minnesota and a master's degree in Public Administration from the University of Washington's Daniel Evans School of Public Affairs. He began his career as a Management Assistant for the City of Mercer Island, WA, before serving as the City Administrator for Renville, WA; Jefferson, WI, and Baraboo, WI. He retired in 2021 after 17 years of service as the Village Administrator of Shorewood Hills, WI.

Frantz has extensive experience in economic development and redevelopment, formation and administration of tax increment districts, zoning administration, long and short-term

financial management/budgeting, human resources, and implementation of organizational change. Kark works on interim management assignments, human resources consulting and classification/compensation projects with PAA. He has worked on five recent municipal classification/compensation studies.

Understanding

Public Administration Associates, LLC will commit whatever time and effort is necessary to fully complete all tasks described in this proposal for the specified costs. PAA will invoice 33% of the total at contract acceptance, 33% on July 1, 2025, and 33% at project completion (presentation and acceptance of the Fort Atkinson Updated Classification/Compensation Study by the Fort Atkinson City Council).

**If PAA believes a specific task requested by the City is beyond the agreed-upon scope of work, it will negotiate any potential extra charges with the municipality.

Approval:

Offered by:	<u>Kevin M. Brunner</u>	<u>4/16/2025</u>
Public Administration Associates, LLC		Date
Accepted by:	<u></u>	<u></u>
City of Fort Atkinson		Date

City of Fort Atkinson, WI

Classification and Compensation Study

April 18, 2025

Mr. Erik Smetana, MBA, SPHR, SHRM-SCP, SWP
Managing Director & Operations Leader | Public Sector & Higher Education
314.494.4849 | Erik_HenrySmetana@ajg.com

Gallagher Benefit Services, Inc. | ajg.com



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Cover Letter

April 18, 2025

Rebecca Houseman, City Manager
Sarah Weihert, Public Relations Executive Assistant,
City of Fort Atkinson
City Manager's Office
101 N. Main Street
Fort Atkinson, WI 53538

We appreciate the opportunity to present this proposal regarding services Gallagher's Human Resources & Compensation Consulting practice is able to offer the City of Fort Atkinson (the City). Gallagher is highly capable and qualified to work with the City based on our extensive experience with public sector organizations across the country. We would consider it a privilege to serve the City in this capacity.

The City is seeking a consultant to conduct a comprehensive classification and compensation study for its non-represented positions. The last study was completed in 2013, and the current system was implemented in 2014 based on those recommendations. The consultant will be responsible for thoroughly analyzing the City's current classification and compensation system, along with related components. The goal of the new study is to ensure the City remains competitive in attracting and retaining qualified individuals, while maintaining fiscal responsibility and internal equity across positions.

We believe we will provide the City with the most diversely experienced project team of any consulting practice in the country, which enhances the solutions and recommendations we will provide on this engagement. The questions and perspective provided by our team ensure we anticipate any issues the City may face throughout this project, as well as the ongoing management of the updated classification and compensation system.

We have prepared the following proposal in response to your request. We appreciate having the opportunity to submit this proposal and look forward to assisting the City in this engagement.

Sincerely,



Erik Smetana, MBA, SPHR, SHRM-SCP, SWP
Managing Director & Operations Leader
314.494.4849 | Erik_HenrySmetana@ajg.com

Contractor Statement of Qualifications/Experience

Responses to this proposal should include a brief introduction of the company or firm and a summary of the firm's history and experience in conducting classification and compensation studies and formulating pay plans with similar entities. Include a discussion of any methodologies used or approaches taken to compensation studies.

Value Proposition:

The ability to deliver comprehensively structured human capital solutions to clients is Gallagher's signature in the marketplace. At Gallagher, we want to know what makes your organization unique. We listen intently to learn about your culture and priorities and delve deeply into all the details that matter when balancing human capital needs with your bottom line. This single-minded focus on excellence — characterized by innovation and creativity — is the driving force behind every Gallagher engagement.

Company History:

Arthur J. Gallagher & Co. opened its doors for business in 1927 and is still "growing strong" because of a practiced ability to help clients think ahead. Founded by its namesake who was previously the leading producer for Chicago's largest insurance brokerage, Gallagher is now one of the world's largest human capital, insurance brokerage and risk management services firms. We have operations in 33 countries and extend our client-service capabilities to more than 90 countries through a global network of correspondent brokers and consultants. Since 1961, we've been helping clients overcome business barriers and create new opportunities to cost-effectively attract, retain and productively engage the best performers in their field. Gallagher started trading on the NYSE under the symbol AJG in 1984.



Company Culture & Philosophy:

The ideals, principles and values embodied by the founder whose name still appears on our door are part of our corporate DNA. Gallagher's approach to business, cultivated through three generations of family leadership, has always centered on creating relationship value as true partners to our clients. Gallagher's interactions with you will be straightforward and candid. By earning the trust of our clients, we've sustained a reputation for ethics and a commitment to transparency that continue to contribute to our growth.

The high standards of conduct we've set for our external professional relationships are the same rules we follow internally. The Gallagher Way, a one-page document that outlines our 25 shared values, was written in 1984 but is just as culturally relevant today. It speaks to the value of relationships and several tenets set guidelines for ethical behavior. Gallagher combines innovative solutions, thoughtful advice and honest business practices to minimize risk and help fuel your success.



We push for professional excellence.

The Gallagher Way. Since 1927.

Human Resource and Compensation Consulting Practice:

Gallagher's Human Resources & Compensation Consulting practice empowers clients to **attract talent, manage staff, develop leaders, and reward success**—leveraging the power of Gallagher and wisdom of experience to produce an engaged and productive workforce. Tapping into expertise that spans the spectrum of human resources at every level, we can assemble flexible compensation and consulting solutions that improve efficiency and build bottom lines. Our practice is a combination of some of the most respected names in human resources and compensation consulting. Bringing together experts from compensation, performance, search, survey, and leadership fields, Gallagher empowers clients with tools for the entire lifecycle of employment management.

With an experienced team of consultants located in offices across the United States and Canada, our services include:

Compensation & Total Rewards • Job classification and compensation studies • Pay equity audits • Paid time off policy development and implementation • Employee recognition • Executive compensation • Board of directors compensation	Engagement Solutions • Workforce engagement surveys • Customer surveys • Post-survey action plan development and execution • Leading-edge capabilities for measuring loyalty and retention drivers	Human Resources Policy & Strategy • HR assessment and optimization • Employee policy creation and review • HR compliance support • Diversity, equity and inclusion • Gallagher HRnow Program
Leadership Development & Organizational Strategy • Data-driven leadership performance and effectiveness assessments • Organizational design • Succession planning • Leadership development through coaching and training programs	Executive Search • Executive through director-level candidate search • Interim leadership placements • Executive onboarding • Diverse candidate search	Data & Research • Conducts largest survey of employee benefit programs in the U.S. • Produces 25+ national (U.S.) compensation benchmarking surveys annually

Public Sector Consulting Practice:

Gallagher's public sector & higher education consulting practice includes extensive experience in developing and communicating a compensation philosophy, designing and implementing market-aligned pay structures, and developing job evaluation methods to maintain internal equity. We conduct benchmark analyses, including conducting custom tailored salary surveys (if needed), and recommend appropriate administrative and procedural guidelines to maintain the compensation system. We ensure that our clients comply with applicable laws and regulations, such as the Fair Labor Standards Act (FLSA), the Americans with Disabilities Act (ADA), and Equal Employment Opportunity (EEO) standards and have pay systems that are appropriate for their organization and market strategy. We serve clients across an array of strategic and value-adding HR services with **classification and compensation as a core specialty**.

We have a strategic alliance with the Public Sector Human Resources Association (PSHRA), the National Public Employers Labor Relations Association (NPELRA), and the Colleges and Universities Professional Association for Human Resources (CUPA - HR) and have conducted a series of training seminars/workshops on compensation, classification, job evaluation, and employee benefits management throughout the nation in conjunction with these organizations. Gallagher Benefit Services also focuses on the higher education market. Our consultants have demonstrated leadership in the compensation and strategic HR fields by completing training and certifications from WorldatWork, ERI, HRCI, Human Capital Institute, SHRM, and others in addition to serving as instructors and presenters for ICMA, CUPA-HR, NAPO, WorldatWork, NACO, NPELRA, PSHRA and other regional and national associations.

Provide a description of the firm's organization and the qualifications of staff who will perform the work, including experience in similar work, and relevant education.

Project Staffing:

Gallagher fosters a commitment of excellence, professionalism, integrity, collaboration, and urgency to each of our clients. With each unique client, Gallagher combines these principles to deliver client services customized, specifically to meet your needs. Your Gallagher consulting team has years of experience consulting to public sector clients, including public employers, with a significantly diverse employee workforce.

Our team of specialists brings a proven track record of designing and executing comprehensive compensation strategies, performing complex classification analyses, evaluating pay equity to ensure fair, competitive structures, and delivering high-value HR strategy advisory services. Many of our professionals have served as practitioners within the very sectors we support, granting us unique insight into real-world operational challenges. We combine rigorous data analytics, industry best practices, and innovative thinking to craft customized, forward-looking solutions aligned with each organization's strategic HR goals. By drawing from hands-on experience and leveraging an in-depth understanding of market trends, we help our clients both meet current standards and proactively prepare for an ever-evolving talent landscape.

Each member of Gallagher's public sector compensation consulting practice has achieved one or more of the following certifications and/or degrees:

- Certified Compensation Professional from WorldatWork
- IPMA-SCP from the Public Sector Human Resources Association
- PHR and SPHR from the Human Resources Certification Institute
- SHRM-CP and SCP from the Society for Human Resource Management
- SWP and HCS from the Human Capital Institute
- Master's degree or above, in Human Resources, Business Administration, and/or Organizational Psychology

PROJECT LEADERSHIP & LEADERSHIP SUPPORT

ERIK SMETANA, Managing Director, Practice Leader, & Project Advisor – 25+ years of experience

Erik manages operations for Gallagher's public sector & higher education Human Resources & Compensation Consulting practice. Erik's 20-plus-year work history has led him to serve in various diverse roles across human resource management, particularly in compensation and benefits, talent management and organizational development, people analytics, and employee relations and policy development. Erik has extensive experience in private and public sectors, working with an eclectic mix of dynamic organizations, including Fortune 500 companies across multiple industries, international not-for-profit organizations, membership associations, media outlets (e.g., NPR and NBC affiliates), institutions of higher education and research, and others. Before joining Gallagher, he served as the enterprise-wide Deputy CHRO with the University of Missouri System and Vanderbilt University as the Executive Director of People & Engagement, leading, designing, and implementing compensation and people-focused programs and initiatives.

SHARI FALLON, PHR, SHRM-CP, Senior Consultant & Project Manager – 25+ years of experience

Prior to joining Gallagher, Shari worked for Cornell University as a Senior Compensation & Workforce Analytics Consultant for 24 years. In her role at Cornell University, Shari was responsible for providing expertise and consultation to campus constituents and resolving conflicts among functional areas to support best practice standards. She developed and designed the institutional foundation for assessing, delivering, and applying workforce planning analytics, advancing HR interests and shared responsibility in the consistency of practice across recruiting, compensation, staffing patterns, performance management, training, and transaction processing. Prior to Cornell, she worked in Human Resources for Retail and Health organizations. Shari has a bachelor's degree in political science/history from the College of St. Rose in Albany, NY, and is certified as a Professional in Human Resources from the Society of Human Resource Management.

LARRY ROBERTSON, Senior Consultant & Project Manager – 25+ years of experience

Larry's 29-plus-year work history includes a variety of roles including compensation, human resources information systems, and recruiting as well as serving in a primary leadership role as acting vice president for human resources for several months. Larry has experience in both private and public sectors, working in a manufacturing environment before moving to higher education for the 21 years prior to coming to Gallagher. He has previously earned professional certifications with the Human Resources Certification Institute (PHR and SPHR). He has been actively involved in CUPA-HR on chapter, regional, and national boards and is a 2022 CUPA-HR Distinguished Service Award Recipient.

ZAK SHTULBERG, Senior Consultant & Project Operations Leader – 13+ years of experience

Since starting as an HR consulting intern at Buck (now Gallagher) in 2012, Zak has been mission-driven and passionate about collaboration with clients and partners on transformative people, compensation, and other HR initiatives that improve the lives of employees and their communities. Projects have spanned a broad spectrum, including compensation strategy design, change management and communications, workforce planning, project management, analytics and technology enablement, and organization design, among many others. With both internal and external partners, he is recognized for blending strategic and technical advice with innovative analytics and technology and grown as a trusted partner and subject matter expert in HR and compensation. Prior to starting his career, he earned a Bachelor of Science in Industrial and Labor Relations from Cornell University. As Project Operations Leader, Zak ensures client-facing deliverables, and projects overall, exceed expectations and are on time.

DEREK SMITH, PhD, Senior Consultant & Project Manager – 25+ years of experience

Before joining Gallagher, Derek served as the National Executive Director of the Higher Education Recruitment Consortium and as a part-time consultant with Sawgrass Consulting, following more than 15+ years in higher education leadership roles at places like UNLV, Kansas State University, the University of Missouri System, and the University of Pittsburgh. Derek has a bachelor's degree in history, a master's degree in science, a master's degree in business administration, and a PhD in public policy and leadership. He has earned professional certifications with the Human Resources Certification Institute (PHR), the Society for Human Resource Management (SHRM-CP), Economic Research Institute (ERI) Compensation Analyst Credential, and the Korn Ferry Leadership Architect.

CATHERINE THORP, Senior Consultant & Project Manager – 25+ years of experience

Catherine Thorp is a Senior Consultant and Project Manager with over 12 years of experience in compensation strategy, market analysis, and organizational effectiveness. Prior to joining Gallagher, Catherine served as a Senior Compensation Manager at Dun & Bradstreet, where she led key initiatives including salary structure design, career ladder and competency framework development. Earlier, she held progressively senior roles at McLane Company, Inc., specializing in market analysis, HRIS administration, and process optimization. Catherine brings a broad, strategic perspective to Gallagher's practice, with expertise in market competitiveness, pay equity analysis and remediation, career framework development, salary structure design, and system integration. She holds a Bachelor of Business Administration degree with a double major in Management and Science from the University of Mary Hardin-Baylor. She has completed the coursework for the Certified Compensation Professional (CCP) designation through WorldatWork and will receive certification in 2025. She also holds the Compensation Analyst Credential (CAC) from the Economic Research Institute.

PROJECT STAFF SUPPORT**MARY GAUTHE, SHRM-CP, Senior Associate Consultant – 5+ years of experience**

Mary has five years of experience from Louisiana State University, where she served as a Compensation Consultant within the University's Central HR unit. She holds a bachelor's degree in management with a concentration in Human Resources from Nicholls State University and a master's degree in leadership and human resource development from Louisiana State University. For the past two years, Mary has served as an Associate Consultant within the PSHE team.

CHARMAIN KOHLER, Consultant II & Client Liaison – 10+ years of experience

Charmain has over 25 years of human resources experience in a variety of roles and industries. She has a bachelor's degree in business administration with a concentration in Management from Saginaw Valley State University. Prior to joining Gallagher, she was the Senior Compensation Analyst at Numotion and at Saginaw Chippewa Indian Tribe of Michigan. Her professional experience also includes 10 years as a Human Resources Consultant in higher education.

CARISSA MARTO, MA in I/O Psychology, Associate Consultant – 5+ years of experience

Carissa has a bachelor's degree in psychology from Anderson University (SC) and a master's degree in industrial & organizational psychology from Middle Tennessee State University. Prior to joining Gallagher, she held project-based roles working in performance and promotional assessments related to test design.

TRACY MORRIS, Senior Consultant & Associate Project Manager - 15+ years of experience

Tracy has more than 10 years of experience working in the strategic HR space with significant public sector HR and compensation consulting. Tracy holds a bachelor's degree in applied economics and a Master of Business Administration, both from Texas Tech University, and she is a SHRM Certified Professional (SHRM-CP).

JAIME PARKER, Senior Consultant & Associate Project Manager – 15+ years of experience

Jaime has 15 years of experience in Higher Education with 7.5 of those years in compensation and organizational effectiveness. Prior to joining Gallagher, she worked at Kansas State University in Human Capital Services, and also in the Office of Institutional Effectiveness. Before her career in Higher Education, Jaime worked in the Banking Industry as a Banking Center Manager and Customer Service Manager. Jaime is a graduate of Kansas State University with a bachelor's degree in accounting.

SHILOH VENABLE, Consultant – 15+ years of experience

Shiloh Venable is a consultant in Gallagher's Human Resources & Compensation Consulting practice, specializing in the Public Sector and Higher Education service line. She brings more than 15 years of experience in human resources, learning and development, and program management across corporate, nonprofit, and higher education environments. Prior to joining Gallagher, Shiloh served as a learning & development manager at NXP Semiconductors, where she led global leadership development initiatives. She also held roles in nonprofit program management and student affairs at several universities, where she managed complex projects that supported staff and student growth. Shiloh holds a bachelor's degree in human resource development and a master's degree in Education Administration, both from Texas A&M University. She is also a certified Professional in Human Resources (PHR).

AMBER SHANG, MA in I/O Psychology, Senior Associate Consultant - 5+ years of experience

Amber holds a BS with honors in Psychology from the University of Washington and an MA in Industrial & Organizational Psychology from New York University. Before joining Gallagher, Amber has applied her knowledge of people analytics in roles ranging from Talent Acquisition at VNS Health to Compensation Analysis at Willis Towers Watson, and Selection & Assessment at DCI Consulting Group. At WTW and DCI, she helped clients from various sectors to tackle challenges and identify strategic solutions.

XIAOWEN YANG, Associate Consultant – 5+ years of experience

Xiaowen started with Gallagher in October 2023 as a Senior Analyst and was promoted to Associate Consultant in April 2025. In his role, Xiaowen supports multiple classification, compensation (broad-based and executive), pay equity, and organizational development projects for public sector and higher education clients. Prior to joining Gallagher, Xiaowen worked in the insurance, healthcare, and management consulting space for five years, during which time he accumulated analytical experience in learning & development, product management, sales operations, and employee & physician engagement. Xiaowen most recently managed the full-cycle employee engagement survey program – encompassing design, development, analysis, reporting, and action planning - at West Monroe. Xiaowen holds a bachelor's degree in mathematics with minors in business and human communication sciences from Northwestern University. He holds a Certified Analyst Credential (CAC) from the Economic Research Institute (ERI).

Provide the firm's understanding of the services to be performed.

Approach to the Project:

Our practice takes a thoughtful and collaborative approach to all of our client engagements, where we work to ensure our efforts are ones which demonstrate how the Public Sector & Higher Education practice **C.A.R.E.S.** - collaborate/consult, advise/assess, recommend/resource, engage/endorse, and strategize/serve - about our clients and their needs. To that end, our project approach starts with our process and client communications.



Our significant experience has resulted in a comprehensive understanding of the scope of work described by the City. Additionally, we understand the importance of this study as one of many strategies to address current human resources issues and appreciate the delicate nature of public sector spending. Below are some key considerations we have in this type of project, followed by our approach to the areas identified by the City, our detailed work plan, and the estimated project timeline.

Key Considerations:

- **Employee Involvement.** The study should be introduced to employees so they know what will happen and can ask questions, and then we suggest summarizing the study findings at the end of the project in an open session so they can see the results. Updates throughout the process will go a long way toward acceptance of the results. We believe that if employees know how and why they are compensated the way they are, they will accept the results better than if the system was created without their involvement.
- **Leadership Sponsorship.** Change is complicated! Updating classification and compensation systems requires strong and visible support of an organization's management and governance.
- **Internal Equity.** While market parity is important, most employees want to make sure that they are paid fairly in relation to other employees. We have extensive experience with designing pay systems that take into consideration internal equity and mitigate compression.
- **Project Timing.** Doing it right produces a better study outcome than trying to meet unrealistic deadlines.
- **Data/Exceptions.** Rely on data but make decisions based on humans. It has been our philosophy that the results and recommendations should be based on verifiable, auditable and valid data. Once the basic structure is in place, adjustments may be needed for special conditions or other factors. However, the classification and compensation systems should be based on verifiable facts and solid professional standards.
- **Communication.** These systems need to be understood. They need to be simple, straightforward and transparent.
- **Pay Compression.** Give adequate attention to implementation costs when employees are placed in the pay ranges and there is potential for creating or increasing pay compression

Our Approach:

- ***Job Description Review***

We will review existing job documentation for consistency in format and accuracy in job functions. We will use the current job descriptions provided by the City to review and revise the current classification structure. If there are concerns or questions on the descriptions, we will follow-up with discussions with Human Resources, management, or employees to ensure our understanding of the job responsibilities. Through this work we will ensure appropriate job matches and internal alignment in the potential salary structures. Additionally, we can make recommendations on job description content to ensure compliance with applicable laws and regulations.

- ***Internal Equity***

We will work with the City to evaluate each job title with the current job evaluation methodology to determine internal equity. Our project plan and cost reflect diagnostically reviewing all the City job titles and ensuring internal consistency and accuracy of job functions. We have significant experience in applying job evaluation methods but will work with the City to ensure our understanding of the method and the jobs. In many cases, we will verify the current evaluations of the City and ask follow-up questions to clarify any questions.

- ***Market Comparison***

We will work with the City to identify benchmark job classes for the purposes of competitive market analysis. We will survey both current rates of pay, minimum and maximum rates of pay, in addition to the relevant benefits and the employer and employee cost. We will also integrate private sector salary information in the market comparison process from survey sources that represent the local area market.

- ***Salary Structure Development & Implementation Analysis***

To develop a reliable salary structure, we integrate market data and custom survey results with the internal equity ratings from job evaluation, so that the structure is internally equitable and externally competitive. In this step, we assign all jobs to the right pay grade and all employees to the right place in the range based on agreed upon criteria. During this phase, we also discuss how pay progression is integrated in a sustainable system that grows with the City and allows for employee development and contribution to goal achievement. Up to three implementation scenarios will be provided to the City. These resulting pay structures and implementation scenarios will be reviewed to ensure a gender and race neutral system.

- ***Final Report***

As mentioned above, our final report will be prepared which outlines the process, methods, techniques and findings and recommendations of the study. It will include a financial impact analysis and recommended ways to implement and maintain the system in the future. We will provide the data in a format that can be used to update your HRIS system based on your implementation approach. Finally, we will train the HR staff in the proper procedure and methods to manage and maintain the system. Additionally, we will provide the necessary documentation and other materials so the City will be able to maintain the system independent of the consultant following implementation.

Work Plan:

The work plan proposed is designed to provide the flexibility necessary to attract, retain, and motivate employees to provide quality services and ensure the system is not an administrative and/or costly burden to the City now or in the future. Gallagher has integrated the Scope of Services into our phased approach and deliverables to address the City's requests. All phases will require that designated the City - team members and Gallagher have ongoing status meetings to explain the process, review the project's progress, review draft materials, address questions, and discuss next steps.

The phased work plan is as follows:

PHASE 1: STUDY ADMINISTRATION

Meeting via telephone/online platform to initiate project and discuss timelines and key deliverables.

Organization & salary material collected.

Discussion/review of the strengths and weaknesses of the City's current classification system. Discussion of the City's current philosophy and supporting strategies.

Project timetable confirmed.

Employee orientation sessions conducted.

Virtual Meetings are included. On-site visits are available at an additional charge to the City.

PHASE 2: CLASSIFICATION & COMPENSATION STUDY

Conduct of meetings with HR/leadership/project team at critical intervals to discuss deliverables.

CLASSIFICATION STUDY

Review of and analysis of job descriptions/documentation for all employees covered by the study.

Conduct interviews with managers/supervisors (and with individual employees, as necessary) to verify/clarify job information.

Analysis of existing classifications and recommendations on any changes to current classification plan.

Review exempt and non-exempt classifications to ensure proper Fair Labor Standards Act (FLSA) status.

Recommendation of standard classification and titling conventions.

If applicable, allocate employees to an appropriate job class in the new classification structure.

Conduct a complete diagnostic review of current the City's practices to identify areas of concern.

COMPENSATION STUDY

CUSTOM SURVEY

Labor market confirmed and survey participants identified to gather data from local, state and regional sources.

Benchmark jobs identified and summarized (includes one [1] round of client revision).

Benefit and pay practice questions determined for inclusion in the custom survey. Custom survey developed and conducted (includes two [2] rounds of client revision).

INTEGRATE PUBLISHED SURVEY SOURCES

Identify appropriate published survey sources.

Collect market data from published survey sources using data cuts from public, private, local, state and regional sources.

The following activities will be performed on all data:

Comprehensive internal salary relationship analysis of data to ensure the structure is internally equitable and externally competitive.

Competitive analysis of market data (salary, benefits, and contracts) performed.

Diagnostic review of current salary structures conducted to identify opportunities for simplification, reduction in pay compression.

Recommended pay structure developed or existing structures updated (includes 1 revision requested).

PHASE 2: CLASSIFICATION & COMPENSATION STUDY

Internal review conducted and consolidated feedback provided by the City. The City approves the updates to the pay plan(s) and other recommendations and implementation options.

Provide the City with up to three (3) transition options, recommendations and next steps/ongoing maintenance (includes one round of client revision).

PHASE 3: PROJECT FINALIZATION, DRAFT & FINAL REPORTS

Consultant shall make presentations to the HR/leadership prior to completion and at the time of completion, at times and in a manner agreed upon with the City.

Conduct of meetings with HR/leadership/project team at critical intervals to discuss deliverables.

Draft and final report and presentations developed, and quality assurance reviews conducted.

Training provided for staff including necessary tools to maintain the system.

References

Provide a list of three similar projects with similar entities the firm has performed services for within the past 10 years including project cost, names, addresses, and phone numbers of the clients that will be used as a reference.

Contact names and phone numbers are listed for each project. These projects are relevant to demonstrating our ability to meet the needs of the City and show considerable experience in developing compensation systems for a variety of public sector organizations. Our references can attest to the timeliness, quality, and responsiveness of the services we provide, our understanding of job classification and pay equity, and our knowledge of legal issues, such as the ADA and FLSA, and our expertise in working with public organizations and sensitive personnel issues. The projects listed below were completed by members of your project team and within similar timeframes to what the City is requesting.

CITY OF RUSTON, LA | 401 North Trenton Street, Ruston, LA 71270

Julie Keen, Finance Director, 318.251.8651, JulieKeen@RustonLA.gov

In 2022, Gallagher contracted with the City of Ruston to perform a compensation study for all city employees. The study utilized a custom survey and published data to complete the study. The study included police, fire, and utility workers.

CITY OF AUSTIN, TX | 301 West Second Street, Austin, TX 78701

Bryan Dore, Compensation Manager, 512.974.3216, bryan.dore@austintexas.gov

We have been retained to do numerous projects with the City since 2017. In 2017, we were hired to assist the City with a review and assessment of the compensation strategy and to conduct a compensation study for the Human Resources and Legal departments. In 2019, Gallagher conducted another custom salary survey for the City and a comprehensive evaluation of pay equity in comparison to its prior studies to identify if there are any pay equity issues in the organization. Since 2021, we have been engaged in several more compensation projects.

CITY OF GILLETTE, WY | 201 East 5th Street, Gillette, WY 82716-4303

Déca Wasson, Human Resources Director, 307.686.5222, decaw@gillettewy.gov

From 2022 to 2023, we were contracted by the City to perform compensation and HR advisory services.

HARRIS COUNTY, TX | 3100 Main Street, Houston TX 77002

Amanda Porter, Senior Manager, Compensation and Position Control, 713.274.3018, Amanda.Porter@harriscountytexas.gov

We are currently engaged with the County for a compensation, classification, and pay equity study. This study encompasses over 18,000 employees across 4,000 classifications. The study involves writing job descriptions, creating guidelines, and training for salary administration to ensure pay equity.

Additional references and/or case studies are available upon request to support client decision-making.

Compensation

Provide the firm's all-inclusive fee for which the requested work in the Scope of Services Section will be done. This request for information does not, under any circumstances, commit the City to pay any costs incurred by any Proposer in the submission of qualifications. The Proposer is responsible for all costs associated with the response to this request.

Our fees to conduct the study outlined above (including out-of-pocket expenses) will be \$25,500. The table below outlines the price per phase.

Phase	Fees
PHASE 1: Study Administration * <i>Includes virtual meeting and ongoing project management meetings throughout.</i> <i>On-site meetings are available at an additional cost*</i>	
PHASE 2: Classification & Compensation Study **	\$25,500
PHASE 3: Project Finalization, Draft & Final Reports <i>Includes virtual meeting; On-site meetings are available at an additional cost *</i>	
TOTAL COST (inclusive of all tasks) will not exceed: \$25,500	

**On-site meetings are available at an additional cost.*

***Should the City request Gallagher to update/write job descriptions, those services will be priced separately since we are unable to determine the number that will be required. Pricing would be \$550 per job description and is in addition to the "Total Cost" identified above.*

Our study costs are directly derived from estimating the number of hours needed to perform the work and the level of the consultant charged with performing the work. Gallagher typically bills on a monthly basis up to the maximum of each deliverable. Please note, as phases sometimes run concurrently, a phase may not be completed at the time it is billed. All expenses are included in this quote. Should the City wish to have additional on-site presentation days or meetings, the estimated cost would be \$4,000 per day.

Any change to the scope of the assignment (beyond what is described above) as well as other work requested beyond this assignment will be billed based on our hourly rates, unless we mutually agree on a fixed fee for the additional work.

Schedule/Timeline

Compose a schedule/timetable for the entire project and for each individual process with a proposed begin date of May 7, 2025 and completion date of no later than August 29, 2025.

The following is an estimate to complete each phase by month. We will discuss the details of each phase during Phase 1 and identify specific deadlines for the project at that time. We will conduct frequent conference calls with the City to ensure the schedule is monitored throughout the project. In today’s world, speed is very important. However, given the significance of this project, it is just as important for the City officials, department heads, and employees to have sufficient time to review and approve the recommendations of Gallagher and to ensure proper communications occur. We have prepared a timeline to ensure the City has the work products in an expeditious manner. Our phases run concurrently; in that we do not wait until the full completion of a phase to begin another phase. We are prepared to commence the work within two weeks of receiving your authorization to proceed.

	PHASE 1	PHASE 2	PHASE 3
Month	Study Administration	Classification & Compensation Study	Project Finalization, Draft & Final Reports
1			
2			
3			
4			

Contractual Considerations

Gallagher is pleased to submit this proposal to the City. While this proposal is not meant to constitute a formal offer, acceptance, or contract, notwithstanding anything to the contrary contained in the proposal, Gallagher is submitting this proposal with the understanding the parties would negotiate and sign a contract containing terms and conditions that are mutually acceptable to both parties.

Our legal team has provided the following exceptions to the terms and conditions outlined in this proposal. We are open to discussion on these.

- Gallagher is not a federal contractor or subcontractor. Therefore, Gallagher cannot agree to federal contracting provisions contained within the RFP.

* * * * *

Thank you for this opportunity to offer our services. Please feel free to contact us at any time if you have any questions or require additional information. We look forward to hearing from you soon.

Sincerely,



Erik Smetana, MBA, SPHR, SHRM-SCP, SWP
Managing Director & Operations Leader
314.494.4849 | Erik_HenrySmetana@ajg.com



ajg.com

The Gallagher Way. Since 1927.

Gallagher is pleased to submit this proposal to you. While this proposal is not meant to constitute a formal offer, acceptance, or contract, notwithstanding anything to the contrary contained in the proposal, Gallagher is submitting this proposal with the understanding the parties would negotiate and sign a contract containing terms and conditions that are mutually acceptable to both parties.

This material was created to provide accurate and reliable information on the subjects covered by should not be regarded as a complete analysis of these subjects. It is not to provide specific legal, tax or other professional advice. The services of an appropriate professional should be sought regarding your individual situation.

Consulting and insurance brokerage services to be provided by Gallagher Benefit Services, Inc. and/or its affiliate Gallagher Benefit Services (Canada) Group Inc. Gallagher Benefit Services, Inc., a non-investment firm and subsidiary of Arthur J. Gallagher & Co., is a licensed insurance agency that does business in California as "Gallagher Benefit Services of California Insurance Services" and in Massachusetts as "Gallagher Benefit Insurance Services.



Paypoint HR, LLC Response to RFP for a
Compensation and Classification Study
City of Fort Atkinson, Wisconsin
April 18, 2025

Paypoint HR, LLC
695 Santa Maria Lane
Davidsonville, MD 21035
(443) 336-4272

Management Synopsis

Paypoint HR, LLC is submitting a proposal to conduct a comprehensive Classification and Compensation Study for the City of Fort Atkinson. The goal is to support the City's efforts to become an employer of choice by evaluating approximately 32 non-represented classifications, reviewing internal job alignment, assessing external market competitiveness, and recommending adjustments based on quantitative analysis. The 16-week project is proposed at a firm fixed price of \$24,625.

Our collaborative methodology ensures employee input, promotes buy-in, and supports implementation. Recommendations are tested for practicality and designed to enhance recruitment, retention, and motivation. The study will consider full compensation packages, current trends, and customized solutions. Upon completion, the City will receive tools for ongoing administration, including a custom Compensation Factor Scoring (CFS) system to support future job evaluations.

Consultant Information

Paypoint HR, LLC is an innovative, cost-effective, Woman-Owned Small Business specializing in custom classification and compensation solutions for public sector clients since 2012. Headquartered in Maryland and North Carolina, our team combines expertise in HR, compliance, analytics, organizational design, and strategy to help clients recruit and retain top talent. We have completed similar studies for municipalities in over 35 states nationwide.

Our collaborative, multi-disciplinary approach results in tailored recommendations that ensure internal equity, market competitiveness, and regulatory compliance. We offer in-depth data analysis, compliant job descriptions, appeals support, and custom pay structures. With decades of experience, proprietary tools, access to current survey data, and a deep understanding of industry best practices, our team is well-positioned to deliver high-quality service. We maintain active membership in WorldatWork and SHRM and regularly contribute to the field through speaking and board roles. We are fully resourced and ready to support this project, and we welcome collaboration while respecting the demands on the client's time.

Karin Campbell and Dr. Rick Campbell are legally authorized to represent Paypoint HR and will serve as the main contacts for the project.

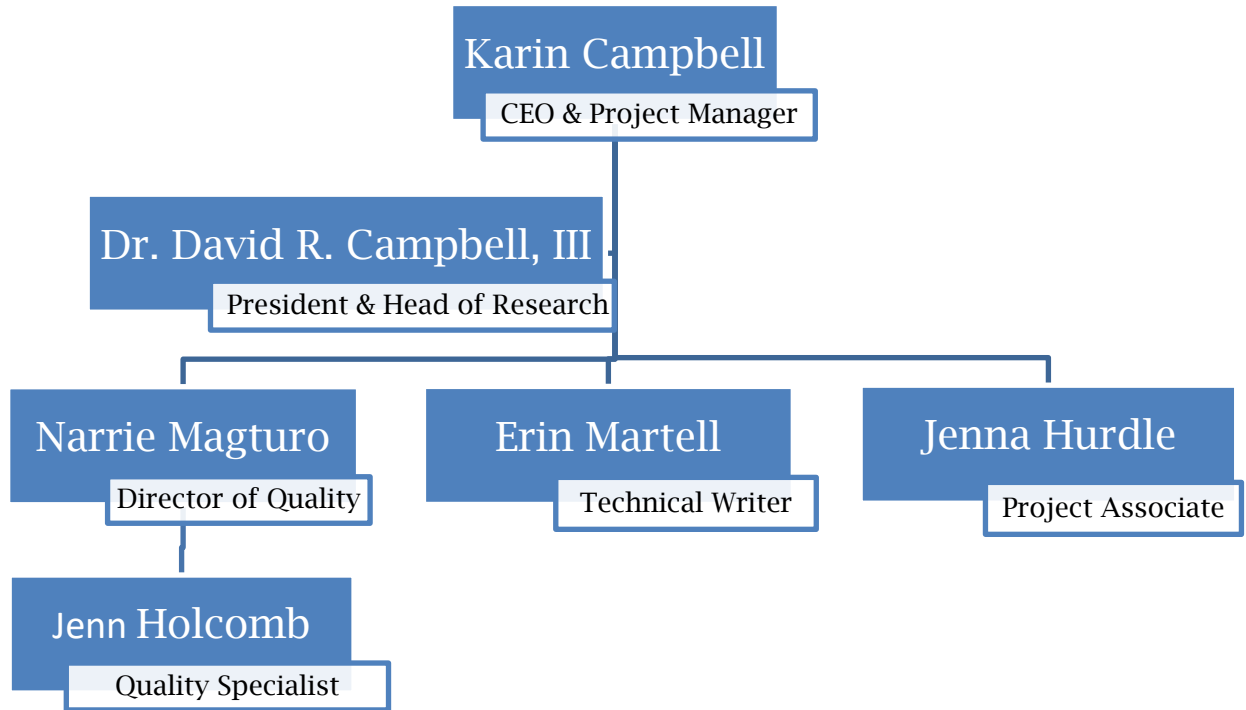
Project Manager – Primary Contact

Karin Campbell, SPHR, SHRM-SCP
695 Santa Maria Lane
Davidsonville, MD 21035
Karin@PaypointHR.com
(443) 336-4272

Technical Director – Secondary Contact

Dr. Rick Campbell, CCP
695 Santa Maria Lane
Davidsonville, MD 21035
Rick@PaypointHR.com
(540) 815-7837

Project Team



Principals



Karin Campbell, SPHR, SHRM-SCP, IPMA-SCP

Master of Business Administration, University of Texas
Bachelor of Science in Business Marketing, University of Maryland

Mrs. Karin Campbell has led Human Resource initiatives for more than 20 years. She has helped over 700+ employers and 15,000 employees with the development and delivery of customized HR solutions for employee management programs; conducting labor cost analysis of employee administration, benefits, retirement, workers' compensation, federal, state, and local taxes; budgeting for human capital including recruiting, onboarding, benefits, risk management, training, and compliance; and planning, design, and implementation of payroll administration; health, dental, vision, life, and AD&D insurance; and pension, as well as ancillary benefits within a limited timeframe to large workforces.

She has consulted with clients and their employees on complicated employment topics. Her responsibilities also include development and maintenance of compliance and risk management programs. She has taught OSHA compliance as an adjunct professor. Currently she holds SPHR, SHRM-SCP, and IPMA-SCP designations and serves on the Board for the ASHRM chapter. Karin has a strong understanding of current trends in the benefits industry. Karin worked from 1995-2002 for HRLogic, Inc., a wholly owned subsidiary of Fidelity Investments. Most recently Karin owned her own HR firm, Alpine HR, from 2003 until 2012, when she sold her business. In 2013, Karin along with her husband, Rick, formed Paypoint HR, an HR consulting firm which specializes in employee compensation for both private and public-sector concerns.

Karin's expertise has been utilized in studies that involve:

- Employee Outreach – She has developed time tested approaches to gaining employee buy in through effective communication and involvement of staff at all levels. She has created formats for briefing sessions, and orientations that follow accepted industry protocol and considers both the qualitative and quantitative aspects of data collection. Her approach has allowed for better understanding of the nuances within organizations and uses it to formulate recommendations and overcome obstacles that positively impact acceptance.
- Policy Design and Implementation – She has created a process methodology for implementation of classification and compensation recommendations. The flow of the process lends itself to clear transfer of administration and maintenance from plan adoption through to long-term application.
- Communication Plans – She has led successful projects by creating communication plans with the input of each client to recognize project milestones and progress. She has created relationship reporting to ensure projects are completed on time and within budget.
- Business Strategy – She analyzes the strengths, weaknesses, opportunities, and threats faced by each client and the community they serve to incorporate resources into the final recommendations that maximize return. She has helped clients face challenges in gaining the financial commitment necessary to adopt and implement recommendations.



Dr. Rick Campbell

Ph.D. in Engineering Science and Mechanics, Penn State University
Bachelor of Science in Applied Mathematics, University of Virginia
Certified Compensation Professional (CCP), WorldatWork

Dr. Rick Campbell's extensive education and experience in the field of mathematics has enabled him to understand highly technical issues. Because he has managed both internal and external clients, he has developed the ability to take the most advanced problems and convert them into easily understood terms and processes. He has applied this experience to the field of compensation and classification for the past 112 years.

He has worked for NASA GSFC, GE Aircraft, and Lockheed Martin Space Systems among others. His roles included Team Lead, Project Manager and Principal Engineer.

Dr. Campbell holds 7 U.S. and international patents for his creative ideas on product and process improvement. Rick has experience with Lean Six Sigma for both service organizations and manufacturing organizations. He brings his unique skills to Paypoint HR to improve the accuracy of our research findings and recommendations.

Rick's knowledge heavily influences the following areas of the study:

- Performance Based Pay – He has built pay plans that incorporate performance metrics and translates them into fair pay based on relevant goals. His plans maintain objectivity and are multifaceted. He has established performance review processes and standards for merit-based compensation pay. He has converted organizations to pay-for-performance that desired merit-pay programs and were limited by existing policy and structures.
- Big Data and Research Analytics – He has worked on projects that have required large data sets and has created the format to collect and manage the data that maintains integrity and validity. He has engineered programs that are user friendly yet robust in their functionality and interpolates data into meaningful information to a granular level.
- Trends analysis – He has reviewed and analyzed data that look for patterns and correlation to determine if they are valid indicators for comparison. He has looked at causality and correlation links to consider potential for predictability.
- Study Validity – He has determined appropriate metrics for comparison in the selection of comparator organizations and benchmark positions to ensure relevancy of findings.
- Financial Impact – He has applied both short-term and long-term implications of recommendations for clients to assist in the ability to project necessary funding and revenue sources.

References

Contact Name	Contact Info	Project Title and Service Dates
Robin Davis County Treasurer Knox County	200 South Cherry Street Galesburg, IL 61401 (309) 343-7002 RDavis@CO.Knox.IL.US	Classification & Compensation Study 2019 – 2024

Knox County employs approximately 349 full-time and 70 part-time staff across 18 departments, with many positions covered by collective bargaining agreements. The

Classification and Compensation Study focused on reviewing the County's current pay and benefits structure, conducting a market comparability analysis, and recommending revisions that promote internal and external equity.

The study also includes providing implementation options for a new system, outlining methodologies for employee placement, and evaluating the financial impact, advantages, and disadvantages of each alternative. Fees billed at \$125 per hour for \$55,000 total.

Contact Name	Contact Info	Project Title and Service Dates
Joe Fischbach Human Resources Manager City of Cottage Grove	12800 Ravine Parkway S. Cottage Grove, MN 55016 (654) 458-2883 JFischbach@ CottageGroveMN.gov	Position Classification and Compensation System 2020 - 2024

The City of Cottage Grove employs 145 full-time, 12 part-time, 47 paid on-call Fire, and 200 seasonal staff, with 82 employees represented across four unions. The Classification and Compensation Study aims to evaluate and update the City's position evaluation and pay system, ensuring internal equity, external competitiveness, and compliance with ADA and state/federal regulations. Fees billed at \$125 per hour for a total initial project fee of \$35,000.

Key components include:

- Assessing City needs and compensation philosophy
- Reviewing and updating job descriptions for compliance
- Re-evaluating positions using point factor methodology
- Classifying and banding positions to ensure internal equity
- Conducting a market survey to develop a competitive, equitable pay structure
- Recommending system improvements, including reclassification protocols and exempt status determinations
- Providing implementation support, training, and post-contract services, including assistance with the State Pay Equity report.

Contact Name	Contact Info	Project Title and Service Dates
Jim Langemo HR Director Kim Kosta Interim HR Director City of Brooklyn Center	6301 Shingle Creek Parkway Brooklyn Center, MN 55430 LangemoConsulting@Gmail.com (612)423-5132 JKosta@BrooklynCenterMN.gov (763) 569-3303	Peer Market Survey and Job Salary Analysis 2024-2025

The study covered approximately 309 employees across 122 classifications and aimed to address recruitment and retention challenges. Key goals included evaluating salary competitiveness and equity, recommending updates to salary placement policies and structures, and establishing a sustainable compensation framework. Firm fixed fees of \$45,000.

The scope included a peer market survey, an internal equity review, and the development of a classification and pay grading system. The City also sought ongoing support for salary and job classification analyses as new or evolving positions arise.

Contact Name	Contact Info	Project Title and Service Dates
Stephanie Romagnoli Human Resources Manager City of Muscatine	215 Sycamore Street Muscatine, Iowa 52761 (563) 264-1550 SRomagnoli@MuscatineIowa.gov	Compensation Study 2023

The City of Muscatine employs 144 staff across 86 classifications. The Compensation Study focused on evaluating non-union positions for internal equity and external competitiveness. This included reviewing current pay ranges, comparing roles to local labor market conditions, and surveying at least ten public-sector and five private/public employers. Firm fixed price of \$37,500

The study involved developing a compensation survey, analyzing job content, estimating fiscal impacts of aligning with market rates, and optionally evaluating insurance, leave, and retirement benefits. The goal was to support a data-driven, equitable compensation structure.

Scope of Work

Assessment of Needs

Paypoint HR has done a preliminary review of possible hurdles specific to the city of Raytown's ability to attract, motivate, and retain employees. Furthermore, our project history has familiarized us with projects similar in size, scope, and services. You can feel confident our approach is time tested.

Our understanding of the project is that the City of Fort Atkinson, a growing community in Jefferson County with approximately 100 full-time employees across 14 departments, is seeking a qualified consultant to conduct a comprehensive classification and compensation study for its non-represented positions. The City operates under a Council-Manager form of government, and its current compensation system was last updated in 2014 following a study completed in 2013.

The purpose of this project is to ensure the City's pay structure remains competitive, equitable, and fiscally responsible to support the recruitment and retention of qualified staff. The study will include a full review of approximately 32 job classifications, the existing pay structure, and relevant market data. Key deliverables include updated job descriptions, market-based compensation recommendations, identification of pay compression issues, and an implementation plan. The consultant will also provide staff training and present findings to City leadership. Benefit administration is excluded from the scope.

Possible Challenges

Paypoint HR found the following issues as possible sources of challenges:

- Increase in community demands and expectations for service offerings paired with limited resources to quickly adapt,
- Difficulty recruiting qualified individuals for certain positions,
- Job roles have changed due to changing technology, increased regulations, etc.,
- Increasing cost of employee benefits,
- Pay compression, external inequity, and perception of internal inequities, and
- A highly competitive labor market with other public and private employers in the region competing for the same labor force.

These obstacles are independently problematic and collectively require a change from a tactical management style to a strategic management philosophy. We believe developing a long-term strategy for recruiting and retaining employees is the true intent of this RFP. Paypoint HR understands we will be working with an appointed team leader, key leadership staff, and stakeholders (Project Team) to validate the scope of services, methodology, timelines, and other deliverables. We anticipate several virtual meetings, but we remain

flexible to meet your needs. We are planning that meetings will be used to kick-off the project, employee briefing sessions, and presentation of the findings of the study.

Methodology

Our methodology is comprehensive and encompasses all of the requirements specified in the RFP. Phase 1 focuses on the Classification/Internal Components. Phase 2 focuses on the Compensation/External Component. The standard methodology we will use to conduct both phases of the study is laid out in the flowchart and delineated below.

Paypoint HR plans to conduct the internal equity portion of the study prior to the external portion of the study though some activities will be conducted simultaneously. The reasons for this include:

- Job titles and job descriptions are, in the minds of the employees and their supervisors, inextricably associated with the “worth of the work” or pay. Compensation is often a highly emotional issue. By separating the two phases of the study, even though elements of the phases may be conducted concurrently, it gives us two separate yardsticks of measure.
- The compensation review will be completed when there is a full understanding of the scope of work, thereby ensuring that the data developed from the labor market and client’s classifications are correct.

Paypoint HR uses an expectation of excellence philosophy when approaching our projects. Based on the size and scope of each project, we determine the most effective utilization of resources and build our project team. We use secure, effective communication tools to safely and transparently share information. This approach tends to take a people-centric perspective, implementing short phases or steps that rely on ongoing feedback. This continuously reshapes and refines the project path. The methodology has proven successful over time and frees teams from using a cookie cutter approach to designing a custom work product. As a consequence, we are able to offer faster turnaround and the dynamic ability to quickly adapt to changes.

Phase 1 – Classification/Competencies Component

- A. Project Start and Initial Meetings
- B. Baseline Data Collection and Initial Analysis
- C. Job Analysis Collection and Completion & Focus Groups
- D. Job Evaluation and Classification Development
- E. Draft Job Descriptions and Policy Guides
- F. Develop Guide for Implementation of Changes and Draft Interim Report

Phase 2 – Compensation Component

- A. Identify Benchmark Positions and External Survey Comparator List
- B. Design and Distribute Survey

- C. Collect and Analyze Survey Data
- D. Internal Relationship Analysis and Alignment
- E. Preparation of Draft Report
- F. Deliver Final Report and Deliverables for Implementation

We will look at both qualitative data and quantitative data throughout both the classification and compensation portions study. The purpose of statistical data allows us to capture a snapshot of the existing plan and create baselines on the existing plan. This gives us a starting point to uncover areas of possible review and revision recommendations.

Phase 1 Classification/Competencies Component

This phase of the assignment will result in the study of all classes that includes the comparison of classes within series and to other occupational levels within the organization. Study tasks include: project initiation and orientation, employee orientations, creation of custom survey for employees and managers, completion of Position Vantage Point by employees, desk audits by managers and/or Human Resources, and interviews with employees/focus groups. The cumulative information gathered will culminate in the preparation of revised or new class specifications, and a review process for all employees included in the scope of the study.

Task 1A – Project Start

The project initiation phase encompasses all the steps required to initiate the project. This task includes the following activities:

Kick-Off Activities

Prior to project launch, Paypoint HR will request and review relevant materials to understand the client's current classification structure and compensation context. Initial steps include meeting with the HR Director to align on methodology, deliverables, and timelines, and to develop a communication plan.

We will gather data on compensation issues, strengths, weaknesses, and organizational structure. Activities include scheduling a project kick-off, employee briefings, and reviewing prior studies, job descriptions, pay structures, policies, and strategic goals. Continuous communication will be maintained to identify opportunities and challenges, and to support informed, competitive compensation recommendations.

Task 1B – Baseline Evaluation

Paypoint HR will incorporate the accumulated knowledge and understanding of the project gathered at this point into a main client file. Data will be collected throughout the project and will be housed in this central location. The Baseline Evaluation Task evaluates the current system as outlined and includes the following activities:

Paypoint HR will conduct a comprehensive evaluation of the client's current position review and compensation processes, including Q&A sessions, data collection, and analysis of career ladders. We will assess the existing pay structure's strengths, weaknesses, and alignment with the client's compensation philosophy and staffing goals.

This includes reviewing classification materials, interviewing key staff, and documenting the organization's compensation philosophy and budget framework. We will analyze recruiting and retention challenges, compare current market positioning using both client-preferred and internal data sources, and ensure recommendations are practical, budget-conscious, and compatible with the client's IT and administrative capacity.

Task 1C – Job Analysis Collection and Completion

The job analysis portion of the study includes employee outreach. We find that by having employee involvement, your staff will feel more valued. By gaining insight from employees about their position and the overall pay structure, in their own words, the study deliverables will be more relevant and as a result, employees will be more inclined to accept recommendations.

Paypoint HR will conduct employee briefing sessions to explain the study's purpose, clarify roles, and guide staff on completing the Position Vantage Point (PVP) job analysis questionnaire. The PVP is used to define job requirements—not evaluate performance. Employees typically have 10–14 days to complete the PVP. Completed forms are reviewed by department heads, often with supervisor input, over a 7–10 day period. Finalized responses are submitted to HR and then forwarded to Paypoint HR for analysis.

Task 1D – Job Evaluation and Classification Development

In Task 1D, Paypoint HR will conduct a detailed evaluation of job analysis materials, including PVPs, desk audits, and job descriptions. We will either use the City's existing classification method or apply our Compensable Factor System (CFS) to assess internal equity.

Each classification will be reviewed and scored using a point factor system, forming the basis for preliminary classification structure recommendations. Positions with similar scores will be grouped into pay grades, with pay range minimums and maximums set after market data review.

A classification plan concept and employee allocation list will be shared with the Project Team for feedback. Recommendations will align with FLSA, EEO, and ADA standards and will account for operational changes, reorganization, and internal equity. A final Index will document all current and proposed classifications and titles.

Task 1E – Draft of Job Descriptions and Policy Guides

Task E involves drafting and reviewing new or significantly revised job classifications. Draft class descriptions with allocation recommendations will be submitted to Project Leaders and shared with department heads for verification.

Supervisors, managers, and employees will have the opportunity to provide feedback. Paypoint HR facilitates this phase with a structured, transparent process to avoid disputes and ensure stakeholder engagement.

Each employee will receive a form indicating how their position is affected, with signature options to either confirm agreement or note concerns or requested edits. This collaborative step is essential to ensuring accuracy and buy-in before finalizing classifications..

Task 1F - Develop Guide for Implementation of Changes and Draft Interim Report

A Draft Interim Report of the Classification Study will be completed and submitted to the client for review and comment. The report will contain:

- A recommended classification plan;
- A classification implementation and maintenance manual, including documentation regarding study goals and objectives, classification methodology, approach, and process, as well as analysis and resulting recommendations;
- The recommended allocation list, and classification title changes; and
- Classification concepts and guidelines, as well as distinguishing characteristics and other pertinent information for implementation and continued maintenance of the pay plan.

Once we have received the city's comments regarding the Draft Interim Report and have made any necessary changes, a Final Classification Report will be developed that is compliant with State and Federal Regulations.

Phase 2 Compensation Component

This Section of the study will result in the development of labor market survey parameters and the collection and evaluation of labor market survey data. The findings from the compensation component will be reviewed and analyzed to look for areas of possible improvement. Paypoint HR will create a pay structure that meets the city's objectives. We will give the city perspective on the economic impact adoption of the recommendations will have on the city. This will make the factors for implementation clear and help anticipate needed steps to meet the overall goals.

Task 2A - Identify Benchmark Positions and External Survey Comparator List

Task 2A of the compensation portion of the study will include identifying benchmark job positions and identifying a mutually agreed upon list of external comparators to be included in the external survey. In order to complete this, the following steps will be taken:

- Involving the Study Project Leaders and stakeholders as appropriate, in the decision-making process.

- Agreement on which agencies are included *PRIOR* to beginning the study. Our experience has shown that this is the most advantageous approach.
- Conducting a thorough review of all materials to date including: employee database, classification listing, interviews, compensation review, and meetings with the Project Management Team. This will be closely followed by an exploration of the Project Team's overall strategic compensation vision.
- Thoroughly reviewing the various components of existing compensation plans and policies as well as the regulatory environment surrounding compensation.
- Identifying highly competitive positions within the organization and customizing the survey where appropriate.
- Reviewing and discussing how a compensation program might be designed to support the organization's business strategy and organizational objectives.
- Confirming and discussing the Project Team's preferred percentile placement within the market place.
- Acknowledging the organization's policy with respect to internal pay equity and employee perceptions of fairness.
- Addressing the Project Team's philosophy with respect to employee retention including the role compensation plays in retention issues.
- Reviewing the Project Team's philosophy with respect to fiscal sensitivity and flexibility.

"Benchmark classes" are normally chosen to reflect a broad spectrum of class levels. The positions that are selected normally include classes that are most likely to be found in other similar agencies and will therefore provide a sufficient and valid sample for analysis.

Benchmark positions should encompass the entire range of positions from the beginning of the pay ranges to the end. There should be a number of positions equally interspersed among the pay scale. Positions that have been difficult to attract and retain excellent employees should be included. Paypoint HR will offer information and examples for the Project Leaders to consider and which will provide a measurable, rational, fact-based methodology to determine the relative job worth within the organization (as required by the EEOC).

Paypoint HR will conduct an economic analysis of regional organizations to identify a preliminary unbiased list of appropriate comparators. The purpose of this step is to ensure the worthiness and legitimacy of using these organizations to develop recommendations. This adds validity to the findings and yields defensible results. We will keep in mind the Project Team's criteria on such factors as degree of competition for obtaining and retaining candidates for high quality staff, their location in the city's traditional recruitment areas, and their level of service. Paypoint HR uses objective parameters to determine the legitimacy of findings.

Each organization considered is given a variance score related to data points and an aggregate variance score is created. This will help identify the organizations whose results will provide validity to the study. Upon identifying benchmark positions and the selected

comparators, Paypoint HR will then create the document for surveying the selected organizations and conduct the external survey.

Task 2B – Design and Distribute Survey

In Task 2B of the study, it is anticipated that the creation and distribution of the external survey will take place. This analysis will include a detailed concise presentation of data to be collected. The survey will include job titles along with a brief summary of each position. This approach allows respondents to compare job description to job description and not just job titles, therefore ensuring true "matches" from the survey respondents.

Paypoint HR will send the survey to all comparators and if necessary, complete Freedom of Information Act (FOIA) requests. We conduct all of the survey distribution, data collection, and analysis ourselves to ensure validity of the data and to enforce quality control. While there is an industry standard of 5-15% response rate for surveys, Paypoint HR typically receives 25-40% response rates. While the surveys are out for distribution, Paypoint HR will further examine the existing compensation environment to establish a baseline and keep in contact with the Project Team.

Task 2C – Collect and Analyze Survey Data

Following the distribution of the surveys, Paypoint HR will collect the data and conduct an in-depth review of the survey results with the Study Project Leaders, as appropriate. The purpose of this review is to identify any additional information needed or areas that require further analysis. Paypoint HR will examine salary spread for all grades, ladders between grades, and identify the possibility of positions being compensated differently than intended from the existing plan. We will examine the distribution of employee salaries to highlight challenges and conduct an analysis of wage compression using Paypoint HR's proprietary statistical processes, if requested. Positions that contribute to compression are specifically identified for adjustment.

Task 2D – Internal Relationship Analysis and Alignment

To determine recommendations for internal equity, considerable attention will be given to this phase of the project. It is necessary to develop an internal position hierarchy based on the organizational value of each classification. By reviewing those factors, we will make recommendations regarding vertical salary differentials between classes in a class series (if recommended), as well as across departments.

Paypoint HR analytically develops an internal hierarchy based upon the job analysis responses. The ultimate goal of this critical step of the process is to address any internal equity issues and concerns with the current compensation system. We look for compression and inconsistencies. Our quantitative tool, Compensable Factor Score (CFS) system, allows us to objectively compare between certain classifications.

We will create a sound and logical compensation structure for the various levels within each class series, so that career ladders are not only reflected in the classification system but also in the compensation system. The recommendations will contain pay differentials between levels that allow employees to progress on a clear path for career growth and development. Career ladders will be looked at both vertically and horizontally to mirror the classification structure that was developed during the classification section of the study. Paypoint HR's Compensable Factor Score (CFS) formulation provides a framework to construct an unbiased internal hierarchy of positions.

The internal hierarchy is correlated with the findings of the external market, external equity, by using Paypoint HR's non-linear statistical algorithm. A 90% or greater correlation is typical, lending to confidence that both the internal and external equity are sound and appropriate.

Task 2E – Preparation of Draft Report

Based on internal analysis, Paypoint HR will assess the alignment of salary structures and recommend adjustments such as combining or expanding scales. Using median market data and the client's compensation philosophy, we will recommend pay grades and ranges, address pay compression if requested, and ensure internal and external equity.

A competitive pay analysis will compare current salaries to market conditions, supported by Compa-ratio evaluations that classify positions as below, at, or above market. These findings will inform pay adjustments and financial impact assessments.

The Draft Final Report will include:

- Proposed salary ranges and alternative pay plans
- Identification of under- and over-market positions
- Phase-in implementation options

Following client feedback, final edits will be made, and the report will be submitted in both bound and electronic formats after all concerns are addressed.

Task 2F – Deliver Final Report and Deliverables for Implementation

Paypoint HR typically works on tight schedules that demand extensive communication. We first listen to our clients to understand their specific needs and then create recommendations that fulfill the purpose of the study. Our final report reviews the city's background as related to the study and conveys complex concepts clearly and concisely. We feel this is one of our strongest attributes. An area of communication where we particularly excel is in the ability to communicate with employees at all levels of education and background. The concepts covered during employee outreach are reflected in the final report, as appropriate. This improves morale as the employees feel valued by knowing they have been heard. We are a liaison and have discovered opportunities and issues that would not have otherwise been utilized or addressed.

The final report includes an Executive Summary that summarizes the study methodology and gives recommendations for consideration by the city. The report highlights specific areas where an opportunity exists to improve the city's Classification and Compensation programs. The strategic position of the existing plan is reviewed in relation to the findings and shows comparisons. Recommendations that affect the city's budget are reviewed and their financial impacts are projected to ensure the city is able to support them. The Final Report is developed in a way that is relevant to the current market as well as allows the city to make a long-term strategic plan for attracting and retaining staff. The work product includes steps for implementation, training, and ongoing administration.

Our recommendations have been well received by our audiences. We have developed valued relationships and are considered by our clients and their employees as a trusted advisor. We welcome the opportunity to work with the city to prove ourselves as an excellent service-oriented firm.

The project includes a kickoff meeting and communication plan, followed by employee briefings and job analysis. Deliverables include job evaluation and comparator analysis reports, benchmark development, and an external market survey. Updated job descriptions will ensure FLSA, EEO, and ADA compliance.

Key outputs include reclassification recommendations, a tailored Compensable Factor Scoring System, a new salary structure, and training materials for ongoing administration. Final deliverables include strategic survey findings, a fiscal impact report, and a comprehensive final report summarizing methodology, outcomes, and recommendations.

Implementation

Communication with the Project Team and key stakeholders are described at each step in the process of our project methodology. We consider our audience for implementation to be the Project Team, managers, and employees. We have tailored our process to involve each at the appropriate times. We incorporate meetings, frequently asked questions, questionnaires, informal appeals, reviews and feedback sessions. Various media is used during the project to convey changes. We include: online access to information, written communication, forms, face-to-face meetings, electronic communication, as well as virtual meetings.

Weekly progress reports will be provided to the Project Team. Paypoint HR will also provide to the Project Team status reports every two weeks and as requested. We keep our clients fully abreast of all activities that Paypoint HR undertakes during the course of our projects to ensure timely completion and to short-circuit any issues that may arise.

- Paypoint HR provides forms for discussions with personnel regarding how the changes affect them individually.

- We create Job Discussion Request (JDR) and Job Discussion Guide (JDG) forms for employees and their supervisors to complete and submit to the Human Resources department. While employees may not always agree with our recommendations, they have a "second chance" to ensure that they have been heard and to continue the educational process regarding why specific recommendations were made.
- A manual of instructions and training materials regarding the administration of the proposed compensation system;
- A list of implementation issues, schedules, fiscal impact statements, cost projections, and communications surrounding our recommendations;
- A guide for rules, policies, and procedures for you in implementing, managing, and maintaining the compensation system;
- Train the trainer sessions; and,
- Customized software, unique for each client based on the results of the study, and support plan options.

Tentative Timeline

Phase	Key Activities	Estimated Dates
Project Initiation	Request and review background materials; kickoff meetings; finalize schedule	May 7 – May 10
Communication & Planning	Develop communication plan; create project documentation and executive messaging	May 10 – May 14
Job Analysis Preparation	Distribute PVPs; schedule and conduct employee briefings	May 13 – May 17
Job Analysis Collection	Employees complete PVPs	May 17 – May 31
PVP Review by Supervisors	Supervisors and department heads review PVPs	June 3 – June 10
Job Evaluation & Classification Review	Analyze PVPs, conduct desk audits/interviews, develop classification structure	June 10 – June 24
Internal Equity Review	Evaluate internal relationships and scoring; develop allocation recommendations	June 24 – July 5
Market Survey & Analysis	Conduct compensation survey; review and analyze results	June 17 – July 12
Draft Class Descriptions	Develop and submit drafts; review with managers and employees	July 8 – July 22
Pay Plan Development	Create salary structures, address pay equity and compression, prepare impact analysis	July 15 – July 29
Draft Report Preparation	Submit draft report with findings and recommendations	July 29 – August 2
Review & Feedback	Project Team reviews draft report and provides feedback	August 2 – August 9
Final Revisions & Report Delivery	Final edits, executive meeting, and submission of final report	August 12 – August 20

Our professional experience is that comprehensive studies of this scope and for this size organization take no more than 16 weeks to complete, allowing for adequate position vantage point completion, interview time, classification description development, compensation data collection and analysis, review of steps by the client, the development of final reports, and any appeals.

Timely progress reports will be provided to the client. Paypoint HR will also provide to the Project Team interim reports as the project progresses. We keep our clients fully abreast of all activities that Paypoint HR undertakes during the course of our projects to ensure timely completion and to short-circuit any issues that may arise. A customized schedule would be constructed in conjunction with both Paypoint HR and the city to meet the project requirements.

Cost Proposal

PHASE 1 Classification Component

Task		Hours
A	Project Start and Initial Meetings	8
B	Baseline Data Collections & Initial Analysis	16
C	Job Analysis Collection/Completion & Focus Groups	18
D	Job Evaluation and Classification Development	16
E	Draft Job Descriptions and Policy Guides	5
F	Develop Guide for Implementation of Changes and Draft Interim Report	8
	Subtotal Professional Hours	71

PHASE 2 Compensation Component

Task		Hours
A	Identify Benchmark Positions and External Survey Comparator List	8
B	Design and Distribution of Survey	16
C	Collect and Analyze Survey Data	39
D	Internal Relationship Analysis and Internal Alignment	26
E	Preparation of Draft Report	21
F	Deliver Final Report and Work Products for Implementation	16
	Subtotal Professional Hours	126

Total Estimated Hours of Phase 1 & Phase 2	197
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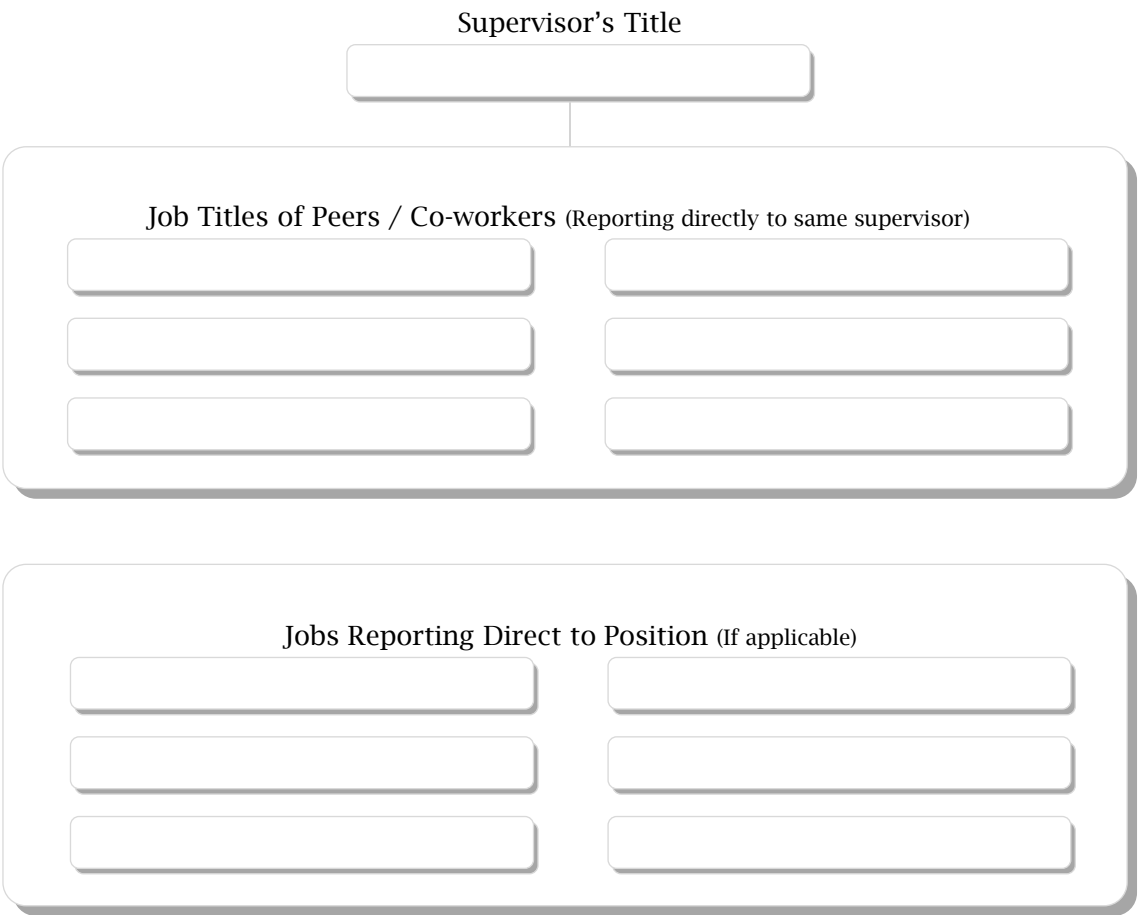
The standard consulting rate for the senior personnel listed, consistent with the Federal GSA schedule, is \$125 per hour of service. The total, firm-fixed price fee would be \$24,625. Travel for a final presentation is included in the quote. Additional in-person meetings would be billed at \$1,250/day and \$2,500 for travel. Regular invoices, including a thorough delineation of services rendered, would be on a net 30-day basis. Paypoint expects support from the client in communication with key staff, setting up meetings, and providing meeting resources, as well as establishing reporting relationships, milestones, and timelines.

Provisions to Other Agencies: Paypoint HR agrees to make available to other Government agencies, departments, and municipalities the prices submitted in accordance with said terms and conditions therein, should any said governmental entity desire to buy under the terms of the proposal.

First Name	Last Name	Job Location
Department	Job Title	Full-time / Part-time

Job Summary
Please provide a summary for the purpose of the position in one or two sentences.

Where Position Fits
Complete the structure using job titles to show where your job fits. Use official classification titles only, not working titles.



Position Vantage Point



Education and Experience

Minimum Education Level that Should be Required for Job Title

- | | |
|--|---|
| ☐ No Degree | ☐ Master Degree in a Related Field (MA/MS/MBA) |
| ☐ High School Diploma / GED | ☐ Master Degree Not in a Related Field (MA/MS/MBA) |
| ☐ Trade School Certificate | ☐ Specialist Degree in a Related Field |
| ☐ Associate Degree in a Related Field | ☐ Specialist Degree Not in a Related Field |
| ☐ Associate Degree Not in a Related Field | ☐ Doctorate Degree in a Related Field (PhD/JD/EdD) |
| ☐ Bachelor Degree in a Related Field | ☐ Doctorate Degree Not in a Related Field (PhD/JD/EdD) |
| ☐ Bachelor Degree Not in a Related Field | ☐ Other |

Degree Field Required for Job Title (e.g., Finance, Business Administration, Civil Engineering)

Required Certifications, Training, and Licensing for Job Title (e.g., Driver's License, CDL, CPR)

Upon entering position: the minimum number years of prior experience in profession required.
(e.g., For Police Lieutenant: 8 years as a certified sworn officer, all ranks including Officer and Sergeant)

- | | | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 0 | 1 | 2 | 3 | 4 to 5 | 6 to 7 | 8 to 10 | More than 10 |

Upon entering position: the minimum number of years in preceding job in job series required
(e.g., For W/WWTP Operator III: 3 years as a W/WWTP Operator II)

- | | | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 0 | 1 | 2 | 3 | 4 to 5 | 6 to 7 | 8 to 10 | More than 10 |

Position Vantage Point



Equipment/Tools (e.g., GIS, Microsoft Office, Backhoe, Narcan)

Visual Acuity (check all that apply)

- ☐ Clarity of vision at 20 feet or more
- ☐ Clarity of vision at 20 inches or less
- ☐ Three-dimensional vision – ability to judge distance and space relationships
- ☐ Precise hand-eye coordination
- ☐ Ability to identify and distinguish colors

Regulatory (Enter number associated with category)

EEO Category Number (if known)

- 1 – Officials / Administrators
- 2 – Professionals
- 3 – Technicians
- 4 – Protective Service Workers
- 5 – Paraprofessionals
- 6 – Office / Clerical
- 7 – Skilled Craft Workers
- 8 – Service / Maintenance

FLSA Status and Exemption (if known)

- 1 – Non-exempt
- 2 – Exempt – Executive
- 3 – Exempt – Administrative
- 4 – Exempt – Computer
- 5 – Exempt – Professional Learned or Creative

Position Vantage Point



Duties and Responsibilities (to identify major duties and responsibilities)

EXAMPLE

Percent of time spent

40%

Priority
(Select one)

Essential ☒

Very important ☐

Important ☐

Somewhat important ☐

Marginal ☐

Result Expected of the Work

Payroll administration for the maintenance department

Tasks Required to Achieve Result

Collecting payroll information from department employees on a weekly basis; reviewing the collected information to make sure that it is complete; forwarding all appropriate documentation (timecards, requests for time off, etc.) to the business office for processing.

Task 1

Percent of time spent

Priority
(Select one)

Essential ☐

Very important ☐

Important ☐

Somewhat important ☐

Marginal ☐

Result Expected of the Work

Tasks Required to Achieve Result

Task 2

Percent of time spent

Priority
(Select one)

Essential ☐

Very important ☐

Important ☐

Somewhat important ☐

Marginal ☐

Result Expected of the Work

Tasks Required to Achieve Result

Position Vantage Point



Duties and Responsibilities (to identify major duties and responsibilities)

Task 3

Percent of time spent

Priority
(Select one)

Essential ☐

Very important ☐

Important ☐

Somewhat important ☐

Marginal ☐

Result Expected of the Work

Tasks Required to Achieve Result

Task 4

Percent of time spent

Priority
(Select one)

Essential ☐

Very important ☐

Important ☐

Somewhat important ☐

Marginal ☐

Result Expected of the Work

Tasks Required to Achieve Result

Task 5

Percent of time spent

Priority
(Select one)

Essential ☐

Very important ☐

Important ☐

Somewhat important ☐

Marginal ☐

Result Expected of the Work

Tasks Required to Achieve Result

Position Vantage Point



Work Environment (Check all that apply)

	Never (0%)	Rarely (1% - 15%)	Occasionally (16% - 40%)	Frequently (41% - 70%)	Regularly (over 70%)	Specific Examples
EXAMPLE: Standing	☐	☐	☒	☐	☐	<u>Speaking at public events</u>
Sitting	☐	☐	☐	☐	☐	_____
Talking	☐	☐	☐	☐	☐	_____
Hearing	☐	☐	☐	☐	☐	_____
Standing	☐	☐	☐	☐	☐	_____
Walking	☐	☐	☐	☐	☐	_____
Driving	☐	☐	☐	☐	☐	_____
Grasping, pulling, pushing	☐	☐	☐	☐	☐	_____
Stooping, kneeling, crouching, crawling	☐	☐	☐	☐	☐	_____
Climbing or balancing	☐	☐	☐	☐	☐	_____
Repetitive wrist, hand and/or finger movement	☐	☐	☐	☐	☐	_____
Work in high, dangerous places	☐	☐	☐	☐	☐	_____
Work in confined spaces	☐	☐	☐	☐	☐	_____
Operate mechanical equipment	☐	☐	☐	☐	☐	_____
Biohazard or bloodborne pathogens	☐	☐	☐	☐	☐	_____
Required to wear respirator	☐	☐	☐	☐	☐	_____
Fumes or airborne particles	☐	☐	☐	☐	☐	_____
Risk of electrical shock	☐	☐	☐	☐	☐	_____

Position Vantage Point



Note: Answer each question independent of any preceding questions. For example: a position that often involves complex and diversified tasks may also involve routine or repetitive tasks. Enter 1 to 5, 1 - Strongly Disagree with the statement to 5 - Strongly Agree.

Strongly Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Strongly Agree
1	2	3	4	5

Complexity (Answer all questions)

- ☐ **Question 1:** This position involves *routine or repetitive* tasks, processes, or operations requiring the application of well-defined rules, procedures, policies, guidelines, and/or instructions.
- ☐ **Question 2:** This position involves generally *standardized* tasks processes, or operations requiring the *choice of action* within well-defined rules, procedures, policies, guidelines, and/or instructions.
- ☐ **Question 3:** This position involves generally *diversified* tasks, processes, or operations requiring the *choice of action* within well-defined rules, procedures, policies, guidelines, and/or instructions.
- ☐ **Question 4:** This position involves *occasional (16% - 40%) complex and diversified* tasks, processes, or operations requiring the *development* of rules, procedures, policies, guidelines, and/or instructions..
- ☐ **Question 5:** This position involves *frequent (41% - 70%) complex and diversified* tasks, processes, or operations requiring the *development* of rules, procedures, policies, guidelines, and/or instructions.

Independence (Answer all questions)

- ☐ **Question 1:** My position primarily involves *detailed* work instructions with *close* supervisory review.
- ☐ **Question 2:** My position primarily involves *detailed* work instructions with *regular* supervisory review.
- ☐ **Question 3:** My position primarily involves *general* work instructions with *regular* supervisory review.
- ☐ **Question 4:** My position primarily involves *broad latitude* on work tasks with *regular* supervisory review.
- ☐ **Question 5:** My position primarily involves *broad latitude* on work tasks with *minimal* supervisory review.

Note: Answer each question independent of any preceding questions. For example: a position that involves employee training may also schedule tasks. Enter 1 to 5, 1 - Strongly Disagree with the statement to 5 - Strongly Agree.

Strongly Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Strongly Agree
1	2	3	4	5

Supervision Received (Answer all questions)

- ☐ **Question 1:** My position frequently (41% - 70%) is provided established policy and procedures.
- ☐ **Question 2:** My position frequently (41% - 70%) is provided specific direction and task/project information needed is generally available.
- ☐ **Question 3:** My position frequently (41% - 70%) is provided general direction and task/project information needed is generally available.
- ☐ **Question 4:** My position frequently (41% - 70%) is provided general direction and task/project information is usually not readily available and must be sought.
- ☐ **Question 5:** My position frequently (41% - 70%) is provided minimal direction and task/project information is regularly vague.

Supervision Responsibilities (Answer all questions)

- ☐ **Question 1:** My position involves the training and guidance of other employees and provides input to supervisors with respect to employee performance.
- ☐ **Question 2:** My position involves the assignment and scheduling of tasks of others.
- ☐ **Question 3:** My position is directly responsible for the performance of others.
- ☐ **Question 4:** My position directs employee performance evaluation including hiring, promotion, discipline, and termination.
- ☐ **Question 5:** My position has absolute authority to hire, discipline, and terminate employees with the involvement of human resources.
- ☐ **Question 6:** Total number of people who report to your position in the organization. (E.g., For a department head, all employees in the department would be included.)

Position Vantage Point



Note: Answer each question independent of any preceding questions. For example: a position that is occasionally somewhat strenuous may also be occasionally very strenuous. Enter 1 to 5, 1 - Strongly Disagree with the statement to 5 - Strongly Agree.

Strongly Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Strongly Agree
1	2	3	4	5

Impact [\(Answer all questions\)](#)

- ☐ **Question 1:** Mistakes made in my position typically lead to only minor costs, waste, or inconvenience.
- ☐ **Question 2:** Mistakes made in my position may lead to some costs, waste, or inconvenience.
- ☐ **Question 3:** Mistakes made in my position may lead to significant costs, waste, or inconvenience.
- ☐ **Question 4:** Mistakes made in my position may lead to major costs, waste, or inconvenience and short-term impact to the direction, goals, and reputation of the organization.
- ☐ **Question 5:** Mistakes made in my position may lead to major costs, waste, or inconvenience and long-term impact to the direction, goals, and reputation of the organization.

Physical [\(Answer all questions\)](#)

- ☐ **Question 1:** On occasion (16% - 40%), my position is slightly strenuous often requiring minimal physical exertion and/or lifting of minimal weight (< 5 pounds).
- ☐ **Question 2:** On occasion (16% - 40%), my position is somewhat strenuous often requiring light physical exertion and/or lifting of light weight (< 20 pounds).
- ☐ **Question 3:** On occasion (16% - 40%), my position is strenuous often requiring some physical exertion and/or lifting of moderate weight (< 40 pounds).
- ☐ **Question 4:** On occasion (16% - 40%), my position is very strenuous often requiring physical exertion and/or lifting of heavy weight (< 60 pounds).
- ☐ **Question 5:** On occasion (16% - 40%), my position is extremely strenuous often requiring substantial physical exertion and/or lifting of especially heavy weight (> 60 pounds).

Note: Answer each question independent of any preceding questions. For example: a position that involves interaction with vendors may also involve interaction with senior managers. Enter 1 to 5, 1 - Strongly Disagree with the statement to 5 - Strongly Agree.

Strongly Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Strongly Agree
1	2	3	4	5

Working Condition (Answer all questions)

- ☐ **Question 1:** My position rarely (1% - 15%) or never (0%) involves exposure to uncomfortable temperature, noise, chemicals/gases, contagious diseases, airborne pathogens, and/or physical trauma.
- ☐ **Question 2:** My position often involves occasional (16% - 40%) exposure to uncomfortable temperature, noise, chemicals/gases, contagious diseases, airborne pathogens, and/or physical trauma.
- ☐ **Question 3:** My position often involves frequent (41% - 70%) exposure to uncomfortable temperature, noise, chemicals/gases, contagious diseases, airborne pathogens, and/or physical trauma.
- ☐ **Question 4:** My position often involves regular (over 70%) exposure to uncomfortable temperature, noise, chemicals/gases, contagious diseases, airborne pathogens, and/or physical trauma.
- ☐ **Question 5:** My position often involves potentially life-threatening exposure temperature, noise, chemical/gases, contagious diseases, airborne pathogens, and/or physical trauma.

Interaction (Answer all questions)

- ☐ **Question 1:** My position requires frequent (41% - 70%) interaction with employees or supervisors within my work area.
- ☐ **Question 2:** My position requires frequent (41% - 70%) interaction with employees and supervisors of other departments.
- ☐ **Question 3:** My position requires frequent (41% - 70%) interaction with administrative and technical staff including those outside the organization, i.e., vendors.
- ☐ **Question 4:** My position requires frequent (41% - 70%) interaction with executive level employees, senior managers, and directors.
- ☐ **Question 5:** My position requires frequent (41% - 70%) interaction with individuals outside the organization including community leaders, citizens, and the media.

Position Vantage Point



Note: Answer each question independent of any preceding questions. For example: position that involves petty cash purchases may also manage the department budget. Enter 1 to 5,
1 - Strongly Disagree with the statement to 5 - Strongly Agree.

Strongly Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Strongly Agree
1	2	3	4	5

Financial (Answer all questions)

☐

Question 1: My position is responsible for minor/petty cash purchases.

☐

Question 2: My position is involved with financial/budgetary matters including purchase orders, payments, grant funds, employee benefits, and the like.

☐

Question 3: My position manages the budget for the department / work unit.

☐

Question 4: My position allocates funds for the various departments / work units.

Question 5: The greatest value that my position has purchasing authority without approval by another individual or external authority. (Select only one)

☐

None

☐

Less than \$5,000

☐

Less than \$50,000

☐

Less than \$1,000

☐

Less than \$10,000

☐

More than \$50,000

☐

Less than \$2,500

☐

Less than \$25,000

Additional Information



MEMORANDUM

DATE: May 6, 2025

TO: Fort Atkinson City Council

FROM: Ben Dayton, Director of Parks and Recreation

RE: Review and possible action relating to 2025 CIP Bathhouse Shower Improvement at the Rock River Park Aquatic Center (Dayton, Parks and Recreation Director)

BACKGROUND

Repairs to the Aquatic Center mechanical room and the shower replacement project were included in the 2025 Capital Improvements Projects budget, which the City Council approved in November 2024. The total estimated cost of the entire project is \$32,000. At the April 3 City Council meeting, the purchase of a new strainer pump was approved as part of this project. This memorandum includes information for phase two of the project, which involves the replacement of the water heater and shower heads at the Aquatic Center Bathhouse.

During an average summer, the Aquatic Center at Rock River Park can see over 30,000 visitors enter the facility during a single season. Patrons who plan to swim must rinse off in the shower before entering the pool. As one can imagine, the Aquatic Center showers are heavily used on a daily basis. Thanks to proper maintenance from the Aquatic Center and Parks staff, many of these fixtures continue to operate well beyond their expected useful life. Yet over the past several seasons, some shower fixtures have begun not to function properly, and in one case, fail entirely. Additionally, one of the water heaters developed a steady leak and needs replacement.

DISCUSSION

The Aquatic Center Bathhouse features the same layout in both the Men's and Women's shower rooms. Each side includes two group showers with three heads each, along with two private showers with one head each, bringing the total to eight shower heads in the locker room, with separate water heaters. According to the State of Wisconsin pool code SPS 390.19, a facility of this size, if newly constructed, must have at least six shower heads per bathroom. Initial specifications for the shower room configuration reduced the number of shower heads to reduce the project cost while also maintaining compliance.

Parks and Recreation staff contacted three local plumbers to request quotes for replacing a water heater and eight shower fixtures. Two proposals were submitted by local contractors, AT

Plumbing and Mr. Plumber. Both contractors have previously worked with the Parks and Recreation Department, providing excellent service and quality. AT Plumbing provided a quote of \$27,932.00, while Mr. Plumber offered a lower quote of \$25,822.32.

Both quotes for the shower fixtures exceeded the budget. The highest expense arises from the number of fixtures. Feedback from additional Parks and Recreation staff led to a cost-effective plan that reduces maintenance costs while staying within budget. The adjustment will replace all four fixtures in the women's shower, maintaining the current number of shower heads. The men's shower will replace two single-head fixtures and retain the two existing group shower fixtures, also keeping a total of eight shower heads. Additional savings may come from using components from decommissioned group shower fixtures to repair units in service.

If approved by the City Council, installation of the replacement water heater will occur before the start of the season. Staff will collaborate with the selected contractor to schedule the shower fixture replacements at a time that does not disrupt the aquatic center's operations.

FINANCIAL ANALYSIS

According to the budget document, \$32,000 was allocated for the entire project in the 2025 CIP, using funds borrowed in 2024. After purchasing the Circulation Pump Strainer, a remaining balance of \$24,275.00 is available for the replacement of one water heater and shower fixtures in the Bathhouse.

Below is a price breakdown of the two quotes that were submitted:

Original Quotes

Contractor	Description	Cost
AT Plumbing	Bock EZ 80-199N Water Heater, Materials, & Labor	\$ 10,482.00
	Fixtures: 2 Group Units, 6 Single-Head, Materials, & Labor	\$ 17,450.00
	Total Expenses:	\$ 27,932.00
	Remaining Budgeted Funds:	\$ 24,275.00
	Balance:	\$ (3,657.00)
Contractor	Description	Cost
Mr. Plumber	Bock EZ 80-199N Water Heater, Materials, & Labor	\$ 9,727.17
	Fixtures: 2 Group Units, 6 Single-Head, Materials, & Labor	\$ 16,095.15
	Total Expenses:	\$ 25,822.32

	Remaining Budgeted Funds:	\$ 24,275.00
	Balance:	\$ (1,547.32)

Mr. Plumber provided the lowest proposed project cost, so staff followed up to review the adjusted plan and seek updated pricing. Mr. Plumber's staff provided a verbal estimate of \$23,508.84 based on subtracting two single-head shower units. Mr. Plumber staff indicated that the adjusted written estimate would be available by May 6th.

Below is the revised price breakdown based on the changes outlined in this staff report:

ADJUSTED

Contractor	Description	Cost
Mr. Plumber	Bock EZ 80-199N Water Heater, Materials, & Labor	\$ 9,727.17
	Fixtures: 2 Group Units, 4 Single-Head, Materials, & Labor	\$ 13,781.67
	Total Expenses:	\$ 23,508.84
	Remaining Budgeted Funds:	\$ 24,275.00
	Balance:	\$ 766.16

With the adjustment to this order, the new total cost was reduced to \$23,508.84, providing a \$766.16 savings to the proposed budget.

RECOMMENDATION

Staff recommends the City Council authorize staff to accept the proposals from Mr. Plumber for the purchase and installation of a Bock EZ 80- 199N Water Heater, 2 Three-Group Shower Fixtures, and 4 Single-Head Shower Fixtures, at a cost not to exceed \$23,508.84.

ATTACHMENTS

1. AT Plumbing- FAAC Bathhouse Estimates 1 & 2
2. Mr. Plumber FAAC Bathhouse Estimate 1-3



A T Plumbing, LLC
N3197 County Rd N
Jefferson, WI 53549
atplumbing23@gmail.com
920-650-1726

Estimate

Date	Estimate #
4/28/2025	1023

Name / Address
C/O Ben Dayton Parks & Rec. City of Fort Atkinson 101 N Main St Fort Atkinson, WI 53538

Terms
Net 30

Description	Total
Scope of work is for the Fort Aquatic Center: Replace existing leaking water heater with same. Bid includes: Labor, materials and water heater Not included: Municipal fees, Frost-Rock excavating, Water treatment devices, exterior services. Please note that we have moved and the new address is at the top of the page. Thank-you!	10,482.00
This estimate is valid for 30 days.	Subtotal \$10,482.00

Signature/Date _____



A T Plumbing, LLC
N3197 County Rd N
Jefferson, WI 53549
atplumbing23@gmail.com
920-650-1726

Estimate

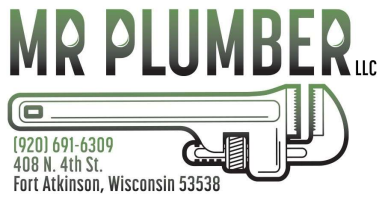
Date	Estimate #
4/28/2025	1021

Name / Address
C/O Ben Dayton Parks & Rec. City of Fort Atkinson 101 N Main St Fort Atkinson, WI 53538

Terms
Net 30

Description	Total
Scope of work is for the Fort Aquatic Showers: Replace 2-3 push button showers with same. Replace 2-3 station showers with single station shower. Replace 4-single stations showers with same. Bid includes: Labor, materials and fixtures Not included: Municipal fees, Frost-Rock excavating, Water treatment devices, exterior services. Please note that we have moved and the new address is at the top of the page. Thank you!	17,450.00
This estimate is valid for 30 days.	Subtotal \$17,450.00

Signature/Date _____



Estimate # 42925-20 Date: 4/29/2025

Fort Atkinson Parks Rec

1200 Lillian Street

Fort Atkinson, WI 53538

Project Hours: 6

Scope: Replacement of leaking/ malfunctioning Water Heater with direct replacement of existing make and model in same location. No modifications.

- Cut out existing unit.
- Dispose of existing unit.
- Adapt on to existing 6" chimney venting.
- Adapt and connect to existing 2" copper lines. Some re-piping is necessary.
- Adapt on to existing gas piping.
- Unit is a match or equivalent to the model that is installed currently.

****DUE TO TARIFFS, EXACT PRICING IS SUBJECT TO CHANGE ON A DAILY BASIS. WE CANNOT GUARANTEE EXACT PRICING AS LISTED IN THIS ESTIMATE. WE RECOMMEND PURCHASING MATERIAL AND HAVING IT ON-SITE TO AVOID ANY PRICING VARIANCES THROUGHOUT THE PROJECT.****

Labor: \$900.00 Material: \$531.08

Fixtures: \$8,296.09

Project Cost: \$9,727.17

This estimate does not include:

Additional permit fees, plans, or approvals, other than those specified on this estimate.

Any demo or removal of fixtures, unless specified on the estimate.

Installation, drilling, or alterations of any countertops, vanities, sinks, or cabinetry.

Any warranty on fixtures not provided by MR PLUMBER, LLC.

Any concrete work or additional underground piping repair, relocation, or replacement, other than specified on this estimate.

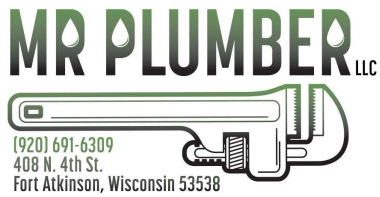
Any work or fixtures not specified on the Estimate.

Please submit changes in writing and a new estimate will be issued.

Customer Agreement must be filled and signed, and a deposit is required to start work.

The above proposal is valid only if signed and accepted within thirty (30) days from the above date. As required by the Wisconsin Construction Lien Law, MR PLUMBER, LLC hereby notifies the owner that persons or companies furnishing labor or materials for the construction on the owner's land may have lien rights on the owner's land and buildings if not paid. Payment is due within thirty (30) days of the date of invoice.

Signature_____ Date_____

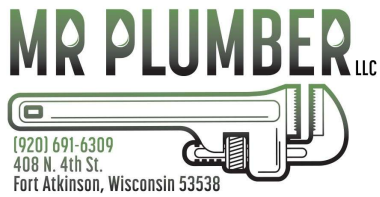


Estimate # 42925-20 Date: 4/29/2025
 Fort Atkinson Parks Rec
 1200 Lillian Street
 Fort Atkinson, WI 53538

Fixture	Model Number	Price	Color/ Finish	QTY	Totals
Bock EZ 80 Gallon 199K BTU Water Heater 6" Vent	EZ 80-199N	8,296.09	N/A	1	8296.09
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
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				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
TOTALS	8296.09			1	

This estimate does not include:
 Additional permit fees, plans, or approvals, other than those specified on this estimate.
 Any demo or removal of fixtures, unless specified on the estimate.
 Installation, drilling, or alterations of any countertops, vanities, sinks, or cabinetry.
 Any warranty on fixtures not provided by MR PLUMBER, LLC.
 Any concrete work or additional underground piping repair, relocation, or replacement, other than specified on this estimate.
 Any work or fixtures not specified on the Estimate.
 Please submit changes in writing and a new estimate will be issued.
 Customer Agreement must be filled and signed, and a deposit is required to start work.
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Signature _____ Date _____



Estimate # 43025-20 Date: 4/30/2025
Fort Atkinson Parks Rec
1200 Lillian Street
Fort Atkinson, WI 53538

Project Hours: 8 Hours

Scope: Fort Atkinson Aquatic Center- Girls and Boys Individual Shower Unit replacements. Replacement of shower valves and trims in existing private showers, 2 on each side of bath house, 4 in total.

- Removal and disposal of existing units.
- Core/ remove/ Modify block wall to allow for individual shower valve install.
- Replace the existing shower valve with a new Symmons valve.
- Tie on to existing copper piping and install with copper water lines.
- Install Vandal-Proof Chrome trim and showerhead trim.
- Any block or masonry patching must be performed by Park's & Rec or contracted at the building owner's expense.

****DUE TO TARIFFS AND OTHER CAUSES OF MARKET INSTABILITY, EXACT PRICING IS SUBJECT TO CHANGE DAILY. WE CANNOT GUARANTEE EXACT PRICING AS LISTED IN THIS ESTIMATE. WE RECOMMEND PURCHASING MATERIAL AND HAVING IT ON-SITE TO AVOID ANY PRICING VARIANCES THROUGHOUT THE PROJECT****

Labor: \$1,200.00 Material: \$289.80 Fixtures: \$3,426.96 **Project Cost: \$4,916.76**

This estimate does not include:

Additional permit fees, plans, or approvals, other than those specified on this estimate.

Any demo or removal of fixtures, unless specified on the estimate.

Installation, drilling, or alterations of any countertops, vanities, sinks, or cabinetry.

Any warranty on fixtures not provided by MR PLUMBER, LLC.

Any concrete work or additional underground piping repair, relocation, or replacement, other than specified on this estimate.

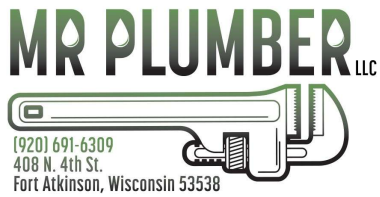
Any work or fixtures not specified on the Estimate.

Please submit changes in writing and a new estimate will be issued.

Customer Agreement must be filled and signed, and a deposit is required to start work.

The above proposal is valid only if signed and accepted within thirty (30) days from the above date. As required by the Wisconsin Construction Lien Law, MR PLUMBER, LLC hereby notifies the owner that persons or companies furnishing labor or materials for the construction on the owner's land may have lien rights on the owner's land and buildings if not paid. Payment is due within thirty (30) days of the date of invoice.

Signature_____ Date_____

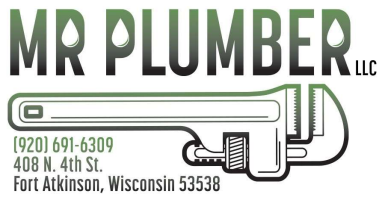


Estimate # 43025-20 Date: 4/30/2025
 Fort Atkinson Parks Rec
 1200 Lillian Street
 Fort Atkinson, WI 53538

Fixture	Model Number	Price	Color/ Finish	QTY	Totals
Symmons 3-325 Metering Shower Valve With Trim	3-325	856.74	N/A	4	3426.96
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
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				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
TOTALS	3426.96			4	

This estimate does not include:
 Additional permit fees, plans, or approvals, other than those specified on this estimate.
 Any demo or removal of fixtures, unless specified on the estimate.
 Installation, drilling, or alterations of any countertops, vanities, sinks, or cabinetry.
 Any warranty on fixtures not provided by MR PLUMBER, LLC.
 Any concrete work or additional underground piping repair, relocation, or replacement, other than specified on this estimate.
 Any work or fixtures not specified on the Estimate.
 Please submit changes in writing and a new estimate will be issued.
 Customer Agreement must be filled and signed, and a deposit is required to start work.
 The above proposal is valid only if signed and accepted within thirty (30) days from the above date. As required by the Wisconsin Construction Lien Law, MR PLUMBER, LLC hereby notifies the owner that persons or companies furnishing labor or materials for the construction on the owner's land may have lien rights on the owner's land and buildings if not paid. Payment is due within thirty (30) days of the date of invoice.

Signature_____ Date_____



Estimate # 42925-21 Date: 4/29/2025
Fort Atkinson Parks Rec
1200 Lillian Street
Fort Atkinson, WI 53538

Project Hours: 12

Scope: Fort Atkinson Aquatic Center-Girls and Boys Group Shower Unit replacements. Convert 1-3 gang shower to an individual shower unit, replace the other 3 gang shower unit with new 3 gang shower unit.

- Removal and disposal of existing units.
- Core/ remove/ Modify block wall to allow for individual shower valve install.
- Replace existing 3 gang shower unit with new unit.
- Tie on to existing coper piping and install with copper water lines.
- Any block or masonry patching needs to be performed by Park's & Rec or contracted at building owner's expense.

****DUE TO TARIFFS AND OTHER CAUSES OF MARKET INSTABILITY, EXACT PRICING IS SUBJECT TO CHANGE ON A DAILY BASIS. WE CANNOT GUARANTEE EXACT PRICING AS LISTED IN THIS ESTIMATE. WE RECOMMEND PURCHASING MATERIAL AND HAVING IT ON-SITE TO AVOID ANY PRICING VARIANCES THROUGHOUT THE PROJECT.****

Labor: \$1800.00 Material: \$387.57 Fixtures: \$8,990.92 **Project Cost: ~~\$11,178.49~~ \$11,178.39**

This estimate does not include:

Additional permit fees, plans, or approvals, other than those specified on this estimate.

Any demo or removal of fixtures, unless specified on the estimate.

Installation, drilling, or alterations of any countertops, vanities, sinks, or cabinetry.

Any warranty on fixtures not provided by MR PLUMBER, LLC.

Any concrete work or additional underground piping repair, relocation, or replacement, other than specified on this estimate.

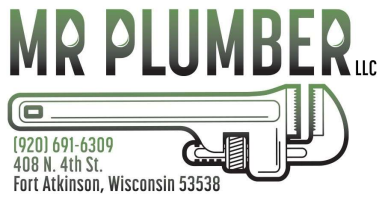
Any work or fixtures not specified on the Estimate.

Please submit changes in writing and a new estimate will be issued.

Customer Agreement must be filled and signed, and a deposit is required to start work.

The above proposal is valid only if signed and accepted within thirty (30) days from the above date. As required by the Wisconsin Construction Lien Law, MR PLUMBER, LLC hereby notifies the owner that persons or companies furnishing labor or materials for the construction on the owner's land may have lien rights on the owner's land and buildings if not paid. Payment is due within thirty (30) days of the date of invoice.

Signature_____ Date_____



Estimate # 42925-21 Date: 4/29/2025
 Fort Atkinson Parks Rec
 1200 Lillian Street
 Fort Atkinson, WI 53538

Fixture	Model Number	Price	Color/ Finish	QTY	Totals
WS-3W Econo-Wall Shower	\$154466 WS-3W	3,638.67	N/A	2	7277.34
Symmons 3-325 Metering Shower Valve with Trim	3-325	856.74	Chrome	2	1713.48
				0	0
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				0	0
				0	0
				0	0
TOTALS	8990.82			4	

This estimate does not include:
 Additional permit fees, plans, or approvals, other than those specified on this estimate.
 Any demo or removal of fixtures, unless specified on the estimate.
 Installation, drilling, or alterations of any countertops, vanities, sinks, or cabinetry.
 Any warranty on fixtures not provided by MR PLUMBER, LLC.
 Any concrete work or additional underground piping repair, relocation, or replacement, other than specified on this estimate.
 Any work or fixtures not specified on the Estimate.
 Please submit changes in writing and a new estimate will be issued.
 Customer Agreement must be filled and signed, and a deposit is required to start work.
 The above proposal is valid only if signed and accepted within thirty (30) days from the above date. As required by the Wisconsin Construction Lien Law, MR PLUMBER, LLC hereby notifies the owner that persons or companies furnishing labor or materials for the construction on the owner's land may have lien rights on the owner's land and buildings if not paid. Payment is due within thirty (30) days of the date of invoice.

Signature _____ Date _____