



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, AUGUST 19, 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

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AGENDA

- 1. Call meeting to order**
- 2. Roll call**
- 3. Pledge of Allegiance**
- 4. 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 August 5, 2025 City Council meeting** (Ebbert, Clerk/Treasurer/Finance Director)
 - b. Review and possible action relating to the **minutes of the August 12, 2025 Plan Commission meeting** (Ebbert, Clerk/Treasurer/Finance Director)
 - c. Review and possible action relating to **building, plumbing, and electrical permit report for July 2025** (Draeger, Building Inspector/Zoning Administrator)
 - d. Review and possible action relating to the City Clerk-issued **License and Permit Report for July 2025** (Ebbert, Clerk/Treasurer/Finance Director)
 - e. Review and possible action relating to **City Sewer, Water, and Stormwater Utility**

Financial Statements as of July 31, 2025 (Ebbert, Clerk/Treasurer/Finance Director)

- f. Review and possible action relating to the Police Chief's recommendations for **Trick or Treat hours** (10/26/25 1–4 p.m.) and Trunk or Treat hours (10/31/24 6–8:30 p.m. at Jones Park) (Bump, Police Chief)
- g. Review and possible action on a Special Event: **Park & Recreation Adult Recess, Friday, September 12, 2025, 6-9 p.m. at Jones Park** (Ebbert, Clerk/Treasurer/Finance Director)
- h. Review and possible action on a **Special Event: The Chapel: Night of Worship**, Sunday, September 14, 2025, from 6:30 to 8:00 p.m. at Barrie Park (Ebbert, Clerk, Treasurer, Finance Director)
- i. Review and possible action on a **Special Event: Chamber of Commerce, Holiday Parade**, Sunday, December 7, 2025, 4:00 p.m. - 6:00 p.m. (Ebbert, Clerk/Treasurer/Finance Director)
- j. Discussion and possible action relating to a **Temporary Retailer's License** for St. Joseph Catholic Church, St. Teresa of Calcutta Fall Festival on September 7, 2025 (Ebbert, Clerk/Treasurer/Finance Director)

5. Public Hearings

- 6. **Public Comment for Matters on the Agenda:** *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, and contact information. No action will be taken on any public comments unless the item is also elsewhere on the agenda.*

7. Petitions, Requests, and Communications

8. Resolutions and Ordinances

- a. Review and possible action relating to a Resolution Extending the life of **Tax Incremental District #6 for one year to fund Affordable Housing Programs and Projects** within the City of Fort Atkinson, Wisconsin (Houseman, City Manager)
- b. Review and possible action relating to a Resolution Extending the life of **Tax Incremental District #7 for one year to fund Affordable Housing Programs and Projects** within the City of Fort Atkinson, Wisconsin (Houseman, City Manager)

9. Reports of Officers, Boards, and Committees

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

10. Unfinished Business

11. New Business

- a. Review and possible action related to the **purchase and installation of the on-site generators** at the Sherman Avenue and Water Street Lift Stations (Sweeney, Wastewater Superintendent)
- b. Review and possible action related to **Solar Project Study Engineering Services** (Sweeney, Wastewater Superintendent)
- c. Review and possible action relating to the **emergency replacement of the library's rooftop condenser** (Lippert, Library Director)
- d. Review and possible action relating to the library's **2025 CIP furniture replacement** project (Lippert, Library Director)
- e. Review and possible action relating to a 5-year contract with **Associated Appraisal for Full-Value Assessment Services**. (Ebbert, Clerk/Treasurer/Finance Director)
- f. Review and possible action relating to an **invoice for the new Public Works and Parks Facility HVAC system annual service maintenance work** from Total Mechanical (Williamson, Superintendent of Public Works)
- g. Review and possible action relating to the **Public Works and Parks Operations Facility HVAC service maintenance contract** (Williamson, Public Works Superintendent)

12. Miscellaneous

- 13. Public Comment for Matters Not on the Agenda:** *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.*

14. 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)

15. Adjournment

Date Posted: August 15, 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, AUGUST 5, 2025 – 7:00 PM
CITY HALL – SECOND FLOOR**

MINUTES

1. Call meeting to order

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

2. Roll call

Present: Councilpersons Huckabee, Johnson, Lescohier, Schultz and President Jaeckel. Also present: City Manager, City Clerk/Treasurer/Finance Director, City Attorney, Director of Public Works, Public Works Superintendent, Director of Neighborhood Services, Fire Chief and Park & Recreation Director

3. Public Hearings

None.

4. Public Comment

Jim Marousis, 94 Shirley Street - spoke on the Pledge of Allegiance and shared stories of local families that are making life changes that are difficult.

John Callan, 522 Robert Street - he is in support of a second comment section to be included on regular council meeting agendas.

Adam Thompson, 365 Ramesh Avenue - spoke on the Pledge of Allegiance. Does not support the pledge being on a Council Agenda.

Laurie Wohlgemuth, 307 E Milwaukee Avenue - spoke on the Pledge of Allegiance. Does support the pledge being on a Council Agenda.

John Hausz, 104 Jefferson Street - spoke on the Pledge of Allegiance. Does support the pledge being on a Council Agenda.

5. Consent Agenda

Lescohier moved, seconded by Schultz to approve the Consent Agenda as presented, items 5.a through 5.c. with a correction noting that Cm. Johnson was not present at the Fluoride Listening Session held on July 14, 2025. Motion carried with the correction.

- a. *Review and possible action relating to the **minutes of the July 15, 2025 City Council meeting** (Ebbert, Clerk/Treasurer/Finance Director)*
- b. *Review and possible action relating to the **minutes of the July 14, 2025 Community Fluoride Listening Session** (Ebbert, Clerk/Treasurer/Finance Director)*
- c. *Review and possible action relating to **Citizen Appointments** to Committees, Commissions, and Boards (Houseman, City Manager)*

6. Petitions, Requests, and Communications

None.

7. Resolutions and Ordinances

- a. *Review and possible action relating to Substitute Amendment #1: An Ordinance to amend Section 2-53 and Section 2-54(f) of the City of Fort Atkinson Code of General Ordinances relating to the **Order of Business and Rules and Bylaws for City Council meetings** (Houseman, City Manager)*

Manager Houseman stated that several members of the City Council have requested an amendment to Section 2-53 of the City's code of general ordinances relating to the Order of Business for City Council meetings to include the pledge of allegiance. The original proposed ordinance amendment made two changes to the order of business for City Council meetings: to add the pledge of allegiance and to codify the use of a consent agenda, which was implemented by the City Council in 2021. The Ordinance Committee met on June 5, 2025, and recommended that the City Council approve the original proposed ordinance to amend Section 2-53 relating to the Order of Business for City Council meetings by a vote of 3-0. The Council performed the first reading of the original proposed ordinance amendment at the meeting on June 17, 2025, and directed the City Manager to prepare it for a second reading at the meeting on July 1, 2025 by a vote of 3-2. The Council performed the second reading of this Ordinance at the meeting on July 1st. At the City Council meeting on July 1, 2025, the Council voted 4-1 to amend the original proposed ordinance to do the following: Move the general public comment period to the end of the agenda; and add a public comment period for matters on the agenda. The Council directed the City Manager to prepare the amended ordinance (Substitute Amendment #1) for a third reading at the meeting on July 15, 2025. Proposed Substitute Amendment #1 incorporates the changes from the meeting on July 1st as well as adding the pledge of allegiance and codifying the consent agenda.

The following motion was made on July 15, 2025, City Council meeting with no action taken. President Jaeckel called for a motion and vote.

Huckabee moved, seconded by Schultz, to split the sections of the Substitute Amendment #1, Section 1. (3) Pledge of Allegiance, Section 1 (4) Consent Agenda, Section 1 (6) Public comment on matters on the Agenda, Section 1 (13) General public comment and Section 1 (f) (2) Other that addresses the prohibited topics for the general public comment. Motion

carried 5-0.

Huckabee moved, seconded by Johnson to approve Section 1. (3) Pledge of Allegiance.

Discussion continued:

Schultz shared comments that did not support the Pledge being included on a City Council Agenda. Johnson shared comments to support the Pledge being included on a City Council Agenda. Lescohier shared comments that did not support the Pledge being included on a City Council Agenda. Huckabee shared comments to support the Pledge being included on a City Council Agenda. Following discussion, a roll call vote was taken. Motion carried 3-2, Schultz and Lescohier opposed.

Huckabee moved, seconded by Schultz to approve Section 1. (4) Consent Agenda, including approval of minutes of previous council meeting. Motion carried 5-0.

Huckabee moved, seconded by Schultz to approve Section 1. (6) Public comment for matters on the agenda. Motion carried 5-0

Lescohier moved, seconded by Schultz to approve Section 1. (13) General public comment. Motion carried 5-0.

Schultz moved, seconded by Huckabee to approve Section 2. (2) A. For general public comments, subject matter of speaker's comments is not limited to agenda items. For public comment for matters on the agenda, the subject matter of speaker's comment is limited to those agenda items. For any public comments, the following topics are prohibited.

Huckabee questioned Ordinance item Section 2. (2) a. 1. - Political topics (of any nature). She disagrees on restricting political topics for general public comment. Houseman stated the prohibited topics have existed in the Ordinance and are not being recommended for change, addition or deletion. Motion carried 5-0.

- b. *Second and possible third/final reading of an ordinance to amend Section 34-2 of the City of Fort Atkinson Code of General Ordinances relating to **Fire Inspection Records and Reporting** (Peterson, Fire Chief)*

Chief Peterson stated the Fort Atkinson Fire Department is responsible for conducting annual fire inspections for up to 700 occupancies each year. These inspections ensure compliance with the City's fire prevention code, which requires businesses to maintain fire protection systems—including fire alarms, sprinklers, extinguishers, and cooking hood suppression systems—through certified annual inspections. Currently, there is no formal requirement for businesses to submit documentation of these inspections or proof that cited fire code violations have been corrected. In many cases, violations noted during the department's annual inspections must be corrected by the business or its fire protection service provider, but confirmation of compliance is often delayed or incomplete. The proposed ordinance change grants the Fire Chief authority to require electronic submission of inspection documentation, along with evidence that any fire code violations identified— either by the department or a certified contractor—have been resolved. The

format and method of submission will be determined by the department, improving efficiency, recordkeeping, and accountability in the compliance process. The Ordinance Committee reviewed this ordinance amendment at the meeting on June 5, 2025 and recommended that staff present the ordinance to the City Council at a future meeting. The City Council performed a first reading of this ordinance at the meeting on July 15th and directed the City Manager to prepare it for a second and possible third/final reading on August 5th.

Huckabee move to suspend the rules and offer a third/final reading of this Ordinance. Motion seconded by Lescohier and carried 5-0.

Huckabee moved, seconded by Schultz to approve the ordinance amending Section 34-2 of the Municipal Code relating to fire inspection records and reporting. Motion carried 5-0.

- c. *Second and possible third/final reading of an ordinance to create Section 18-82 of the City of Fort Atkinson Code of General Ordinances relating to **Certificates of Occupancy for Changes of Use** (Draeger, Director of Neighborhood and Building Services)*

Director Draeger stated that the City of Fort Atkinson does not require a new Certificate of Occupancy when a building or tenant space undergoes a change in use—provided no construction is proposed. This has created challenges in verifying compliance with applicable codes, particularly when the new use differs significantly from the previous one in terms of zoning regulations, building code classifications, and fire safety standards. Without a formal review process, critical life safety and code compliance issues may go undetected. Requiring a Certificate of Occupancy for all changes of use would ensure that all applicable codes are reviewed and enforced prior to occupancy. This approach, common in many municipalities, not only helps safeguard public health and safety but also provides clarity for business owners by identifying zoning, building, and fire code requirements upfront. This can result in significant cost savings by avoiding unexpected upgrades or compliance issues after a location has been selected. The Ordinance Committee met on June 5, 2025, and supported the creation of Section 18-82 to require certificates of occupancy for changes of use. The City Council performed a first reading of the ordinance at the meeting on July 15, 2025, and directed the City Manager to prepare the ordinance for second and possible third/final reading at the meeting on August 5th.

Lescohier moved to suspend the rules and offer a third/final reading of this Ordinance. Seconded by Lescohier and motion carried 5-0.

Schultz moved, seconded by Lescohier to approve the ordinance amending Section 18-82 of the Municipal Code relating to certificates of occupancy. Motion carried 5-0.

- d. *Second and possible third/final reading of an ordinance to create Section 1-16 and amend various other sections of the City of Fort Atkinson Code of General Ordinances relating to **Fees for Procedures, Reinspections, and Permits** (Draeger, Director of Neighborhood and Building Services)*

Director Draeger discuss that the City of Fort Atkinson is currently limited in its ability to

recover the costs associated with code enforcement efforts. The primary enforcement mechanism available is through municipal citations, which are often perceived as aggressive and are difficult to collect. This results in a reactive and punitive system that does little to encourage voluntary compliance or provide flexibility in enforcement. Additionally, time-consuming enforcement activities disproportionately focus on a small number of properties that consistently fail to meet City codes. These properties, though few, consume an overwhelming share of staff resources across multiple departments, including Building/Zoning, Police, Fire, Public Works, and Municipal Court. The result is a significant expenditure of public resources directed at a small number of repeat violators, while the broader tax base bears the cost. Since 2018, the City has incurred a total of \$13,943 in unrecovered citation fines related to persistent code violations. These include \$7,168 for unsightly debris, \$925 for junk or abandoned vehicles, \$937 for residential land use violations, \$185 for off-street parking infractions, \$2,000 for excavation without a permit, and \$2,728 for failure to comply with tree trimming requirements. These outstanding fines represent both a financial loss to the City and a continued enforcement challenge, underscoring the need for strengthened compliance measures and collection efforts. The Ordinance Committee reviewed this ordinance at the meeting on June 5, 2025 and recommended that staff present the ordinance to the City Council at a future meeting. The City Council performed a first reading of this ordinance at the meeting on July 15th and directed the City Manager to prepare the ordinance for a second and possible third/final reading at the meeting on August 5, 2025.

Lescohier moved to suspend the rules and offer a third/final reading of this Ordinance. Seconded Johnson by and carried 5-0.

Lescohier moved, seconded by Schultz to approve the ordinance to create Section 1-16 and amend various other sections of the City of Fort Atkinson Code of General Ordinances relating to Fees for Procedures, Reinspections, and Permits. Motion carried 5-0.

8. Reports of Officers, Boards, and Committees

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

No action was taken.

9. Unfinished Business

None.

10. New Business

*a. Review and possible action relating to proposals for **solid waste and recycling collection services** for the City of Fort Atkinson (Houseman, City Manager)*

Manager Houseman provided that the City of Fort Atkinson has an agreement for the collection of solid waste and recyclable materials with GFL Solid Waste Midwest LLC

("GFL"). The original agreement was made in August 1998 with Superior Services, Inc. and has been assigned multiple times to other solid waste and recycling collection companies. In December 2024, the City Council approved a negotiated amendment to the agreement with GFL that increased the cost by 2% in 2025 and terminated the agreement as of December 31, 2025. In June 2025, staff requested authorization from the City Council to release a request for proposals ("RFP") for solid waste and recycling collection services starting in 2026. The RFP was sent to four known companies and posted on the City's website and other locations. Staff received two proposals by the deadline from John's Disposal Service, Inc. from Whitewater ("John's") and Waste Management from Beloit ("WM"). The proposals are included with this packet for review. Green For Life ("GFL"), the City's current service provider, did not submit a proposal. Staff also sent the RFP to Pellitteri Waste Systems but did not receive a response. Manager Houseman detailed the alternate bid options which varied among bulk and every other week recycling.

Johnson moved, seconded by Lescohier to direct the City Manager to execute a five-year contract with John's Disposal Services at the City's current level of service (Alternate 2) at an estimated total cost of \$914,529, or \$231.00 per customer, for year 1 with 3.5% annual increases. Motion carried 5-0.

- b. *Review and possible action relating to a **Proposals for Financial Auditing Services for the fiscal years ending 2025, 2026 and 2027** (Ebbert, Clerk/Treasurer/Finance Director)*
Clerk/Treasurer Ebbert stated that at the June 17, 2025 meeting, the City Council meeting authorized staff to request proposals from qualified auditing firms for a new three-year contract. RFPs are utilized to maintain fiscal responsibility and compliance with changing governmental financial standards and policies. Staff emailed the proposal to five firms and requested publication on the League of Wisconsin Municipalities and Wisconsin City/County Management Association websites. Four firms provided proposals by the July 10th deadline. Staff reviewed the four submitted proposals and found that one did not meet the requirements outlined in the RFP. The remaining three proposals were evaluated based on their methodology, experience with similarly sized clients engaged in borrowing, and expertise in areas such as TID openings and closures, as well as utility rate studies.

Staff has worked with Baker Tilly for over 20 years. While the partnership has been successful, staff is conscience of the additional duties performed by auditors and the increasing costs of services. Based on the long-standing partnership, robust proposal, vast experience, and the high-quality services received in the past, staff supports maintaining a contract with Baker Tilly.

Huckabee moved, seconded by Johnson move to approve the proposal from Baker Tilly for financial auditing services for the City of Fort Atkinson for the fiscal years ending in 2025, 2026 and 2027 and authorize the City Manager to execute the contract as provided. Motion carried 5-0.

- c. *Review and possible action relating to updated invoice from Aqualis for **2024 Sanitary & Storm water inspection services** (Navin, Director of Public Works)*

Director Navin provided that on October 15, 2024, Staff brought forward a recommendation to Council to approve a contract for Sanitary and Storm water utility inspection services. The City Council approved this contract for \$71,715. This work was completed in late 2024 and early 2025. Through this work, the vendor came across several sanitary and storm sewers that needed additional cleaning, which the City approved for heavy cleaning as the work needed to be done to plan appropriately for the 2025 road construction project. The attached invoice includes an additional \$36,480 for heavy cleaning of the pipes identified in the 2024 work. These costs will be assigned to the respective Wastewater (\$8,977.50) and Stormwater (\$27,502.50) Utility funds.

Schultz moved, seconded by Huckabee to approve the updated invoices from Aqualis for 2024 and 2025 Sanitary and Stormwater inspection services. Motion carried 5-0.

11. Miscellaneous

None.

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)*

Schultz moved, seconded by Johnson to approve the list of Verified Claims as presented. Motion carried 5-0.

13. Adjournment

Johnson moved, seconded by Schultz to adjourned. Meeting adjourned at 8:26 pm.

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



**PLAN COMMISSION MEETING
IN PERSON AND VIA ZOOM
TUESDAY, AUGUST 12, 2025 – 4:00 PM
CITY HALL – SECOND FLOOR**

MINUTES

1. Call meeting to order

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

2. Roll call

Present: Council Representative Schultz, Commissioner members: Ciccarelli, Kessenich, Chairperson Manager Houseman and Director of Public Works Navin. Also present: City Attorney, Clerk/Treasurer/Finance Director and Director of Building Services.

Absent: Commissioners Hough and Shull.

3. New Business

a. Review and possible action relating to the *minutes of the July 8, 2025 Plan Commission meeting* (Ebbert, Clerk/Treasurer/Finance Director)

Kessenich moved, seconded by Ciccarelli to approve the minutes of July 8, 2025 Plan Commission meeting. Motion carried.

b. Review and possible action relating to a *Site Plan Review* for signage at Crown of Life Christian Academy, 535 Berea Dr. (SPR-2025-25) (Draeger, Director of Neighborhood and Building Services)

Director Draeger stated that Crown of Life Christian Academy is proposing the installation of a new monument sign near the primary public entrance to the property. The sign will feature the school's logo and will be internally illuminated for visibility. The proposed monument sign is intended to be installed as part of a broader site improvement effort, which includes a parking lot expansion recently approved by the Plan Commission during its June 24, 2025 meeting. The sign will be located on the existing 36-acre parcel; however, the property has limited visibility and does not feature a significant amount of street frontage. This is a one-sided sign with the school name facing traffic entering the lot. The lighting of the sign is anticipated to not interfere with the neighborhood.

Ciccarelli moved, seconded by Kessenich to approve the Site Plan Review for signage at Crown of Life Christian Academy, 535 Berea Drive. Motion carried.

c. *Update on previous Plan Commission approved projects (Houseman)*

Chairperson Manager Houseman mentioned staff will continue research on projecting signage as it pertains to allowance or lack of in the Ordinance. Two lots in the Klement Business Park were sold in July with construction anticipated in the spring of 2026. The sale of three lots on Marigold Drive will be complete by August 15th. Lots on Maple/Grove have been sold with construction anticipated at the end of 2025/early 2026. Manager Houseman stated the plans for Main Street and Janesville Avenue were approved by the Council. However, there is no schedule for these projects yet.

4. Adjournment

Kessenich moved, seconded by Schultz to adjourn. Meeting adjourned at 4:18 pm.

Respectfully submitted,

Michelle Ebbert

City Clerk/Treasurer/Finance Director



Permit Report

07/01/2025 - 07/31/2025

Permit Date	Permit #	Permit Location	Owner Name	Permit Type	Permit Description	Estimated Project Cost	Total Fees
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Group:

7/9/2025	25529	1701 Montclair Pl	Derek Butler		Replace existing deck with 20x20 treated deck	19,000	\$160.00
							\$160.00

Group Total: 1

Group: Add/Alter Commercial

7/2/2025	25506	1280 Commonwealth Dr.	Todd Willkomm	Add/Alter Commercial	Engineered truss repair from damage from a fallen tree	150,000	\$1,085.00
7/2/2025	25485		Fort Healthcare	Add/Alter Commercial	SPD renovation	260,000	
							\$1,085.00

Group Total: 2

Group: Deck

7/10/2025	25539	1104 Mohawk Ct	Sandy Bare	Deck	Replacing decks with one deck	8,200	\$115.00
7/1/2025	25482	673 W Blackhawk Dr.	Sam Majewski	Deck	Rebuild the deck off the back of the house	10,000	
							\$115.00

Group Total: 2

Group: detached garage

7/26/2025	25583		Patrick Schollmeyer	detached garage	Adding on to Existing garage	5,000	\$153.50
							\$153.50

Group Total: 1

Group: Electrical

7/30/2025	25613	308 E Cramer St	Tianna McConley	Electrical	100A to 200A overhead service	4,370	\$90.00
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7/30/2025	25600	107 E Sherman Ave	Luis & Cindy Padilla	Electrical	Furnace & A/C Rewire	500	\$60.00
7/29/2025	25596		Steve Wollin	Electrical	Roof Mounted PV Solar; 19 Panels	12,886	\$90.00
7/29/2025	25595	263 Heritage Dr	JT Developers & Consultants LLC	Electrical	2 unit condo building, 200A UG electrical service per side	5,000	\$437.85
7/29/2025	25593		April	Electrical	ROOF MOUNTED PV SOLAR INSTALLATION; 11 PANELS	8,420	\$90.00
7/29/2025	25590		Jim Marousis	Electrical	Roof Mounted PV Solar Installation; 11 Panels	8,420	\$80.00
7/28/2025	25584	310 N Fourth St	Darrin Krueger	Electrical	garage sub panel 60A, 8 outlets inside, 1 outlet outside, 9 lights inside and 3 lights outside.	2,500	\$75.75
7/11/2025	25548	901 Van Buren St	Keith Bentel	Electrical	Service upgrade 100 amp to 200 amp	5,000	\$90.00
7/11/2025	25544	626 Monroe St.	Troy Behrens	Electrical	Full First Floor remodel: replace/update electrical devices and wiring, removing load bearing wall and replacing with double LVL 11 7/8" beam point loaded to existing post in basement, partially replace rotted exterior walls and floor system to back of home, Replace rotted roof in back of home, remove	18,000	\$96.25

					exterior door on second floor - replace with window, install exterior door on first floor in back of home, update existing HVAC, replace ALL existing plumbing throughout home.		
7/9/2025	25538	1357 Marigold Dr	Intrepid Investments	Electrical	Townhomes	42,800	\$804.15
7/7/2025	25527		JAMES COURTIER	Electrical	WIRING SWIMMING POOL	500	
7/7/2025	25525	235 Hake St.	Jeff Jones	Electrical	Install power for washer + dryer.	250	\$60.00
7/4/2025	25523		james courtier	Electrical	hook up electric from pool pump to house	600	\$60.00
7/3/2025	25521	1505 Madison Ave	Roundys	Electrical	lighting changes and replace some refrigerated cases	25,000	\$60.00
7/2/2025	25494	604 N Main St	Terry Dinkle	Electrical	bathroom exhaust fan	600	\$60.00
							\$2,154.00

Group Total: 15

Group: Fence

7/28/2025	25588	608 Chippewa Ct	Sarah & Simon Dorfman	Fence	Fence in back yard enclosing red square in attached image, duracolor-treated pine sample	8,154	\$60.00
7/28/2025	25585	1120 W Blackhawk Dr	Logan koch	Fence	6ft tall white privacy fence	13,000	
7/11/2025	25549	611 Oak St	Yessica Hibbs	Fence	Replacing existing fence with composite	2,000	\$60.00
7/9/2025	25536	210 Frederick Ave	David Ebben	Fence	Placement of 4ft chain link	1,900	\$60.00

					fence across two boundaries in my backyard (Reference attached survey for specific placement)		
7/2/2025	25484	933 Peterson St	Avery Schrantz	Fence	We are adding a fence to our backyard	7,300	\$60.00
							\$240.00

Group Total: 5

Group: Fire Suppression

7/29/2025	25594	1355 Trillium Dr	Intrepid Investments	Fire Suppression	New Fire Sprinkler System in New NFPA 13 Building	398,870	\$250.00
							\$250.00

Group Total: 1

Group: Foundation Repair

7/29/2025	25591		Tom Noel	Foundation Repair	install interior drainage w/ sump pump	6,706	\$85.00
							\$85.00

Group Total: 1

Group: HVAC

7/31/2025	25614	1230 Purk Ln	HOWARD STIFF	HVAC	REMOVING AND REPLACING EXISITNG AC	5,483	\$70.00
7/30/2025	25612	806 Caswell St	BECKY ZAHN	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/30/2025	25611	413 Heth St	KAREN HAUBENSCHILD	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/30/2025	25610	612 Lexington Blvd	LINDSEY SCHEIBEL	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/30/2025	25609	202 S Third St E	DEVIN KAPLIN	HVAC	REPLACE A/C	0	\$70.00
7/30/2025	25608	304 Hillcrest dr	CHICK WESTBY	HVAC	REPLACE FURNACE AND A/C	0	\$105.00

7/30/2025	25607	710 Mc Millen St	MIKE TOPEL	HVAC	REPLACE A/C	0	\$70.00
7/30/2025	25606	407 Talcott Ave	RENEE GARLOCK	HVAC	REPLACE A/C	0	\$70.00
7/30/2025	25605	518 E Sherman Ave	DEAN BROWN PROPERTIES	HVAC	REPLACE 2 FURNACE, 2 A/C	0	\$175.00
7/30/2025	25604	1116 Madison Ave	JIM SIMDON	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/30/2025	25603	523 Brighton Way	CINDY MILLER	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/30/2025	25602	1521 Raveen St	VICKI SWANEY	HVAC	REPLACE FURNACE	0	\$70.00
7/29/2025	25597	1233 Janesville Ave	BASE-Badgerland After School Enrichment Program Inc	HVAC	completion of HVAC work per approved plans CB-072500024-PRHK	200,000	\$1,156.75
7/11/2025	25546	626 Monroe St.	Troy Behrens	HVAC	Full First Floor remodel: replace/update electrical devices and wiring, removing load bearing wall and replacing with double LVL 11 7/8" beam point loaded to existing post in basement, partially replace rotted exterior walls and floor system to back of home, Replace rotted roof in back of home, remove exterior door on second floor - replace with window, install exterior door on first floor in back of home, update existing HVAC, replace	18,000	\$146.25

					ALL existing plumbing throughout home.		
7/10/2025	25543	1106 Menomonee Ct	Karen & Steve Verreault	HVAC	AC & Furnace Replacement	19,477	\$105.00
7/9/2025	25530	1331 Erick St.	MATT WILSTEIN	HVAC	REMOVING AND REPLACING EXISTING AC	7,090	\$70.00
7/3/2025	25522	1534 RANGITA ST	HELEN O'NEIL	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25512	211 Heritage Dr	BARB SCHAFER	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25511	611 ROGERS ST.	FRAN LESLIE	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/2/2025	25510	422 WASHINGTON ST	JEREMY COSSON	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25509	528 STRATFORD COURT	BRETT KETTERMAN	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/2/2025	25508	325 WILCOX ST.	DENNIS MESKE	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25507	1531 RAVEEN ST.	DONNA PETERSON	HVAC	REPLACE FURNACE	0	\$70.00
7/2/2025	25505	822 BANKER ROAD	ASHLEY OR ZAVERY DICKSON	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25504	1225 ORCHARD LANE	MEGAN HARTWICK	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25503	235 Hake St.	JEFF JONES	HVAC	REPLACE A/C	4	\$70.00
7/2/2025	25502	701 CHEROKEE	DARREL FALK	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/2/2025	25501	1530 RANGITA ST.	JOYCE VLASAK	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/2/2025	25500	1518 RAVEEN ST.	JANE FOSSUM	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/2/2025	25499	1415 S. MAIN ST.	ANN KOVNESKY	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25497	705 JACKSON ST.	SABRINA OJIBWAY	HVAC	REPLACE A/C	0	\$70.00

7/2/2025	25496	101 S. MAIN ST.	EPIC REAL ESTATE	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25495	14 E. SHERMAN AVE.	PADDY COUGHLIN'S	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/2/2025	25493	1532 RANGITA	JEAN OR SHEILA BADURA	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/2/2025	25492	221 COUNCIL ST.	MARY KING	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25491	1510 MONTCLAIR PLACE	DOUG HECKMAN	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25490	615 Oak St.	KATHY KUTZ	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/2/2025	25489	17 E. HIGHLAND	TAMMY STUDZINSKI	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/2/2025	25488	1615 STACY LANE	PAM BADURA	HVAC	REPLACE A/C	0	\$70.00
7/2/2025	25487	602 Rogers St.	JOYCE LEMKE	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
7/2/2025	25486	79 N Main	RUSSEL LAW OFFICE (JAY BYFORD)	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
							\$4,768.00

Group Total: 41

Group: Other

7/15/2025	25558	1612 Commonwealth Dr	Craig M Moldenhauer	Other	Removing and Re installing electrical services Job # 60088966	1,850	\$60.00
7/11/2025	25550	615 Madison Ave	Tom McCulloch	Other	10.2 kw roof solar array	26,284	
7/1/2025	25483	318 Monroe St	A+ Environmental Inc	Other	Deck, siding, windows, new interior stairs	75,000	\$113.25
							\$173.25

Group Total: 3

Group: Plumbing

7/29/2025	25598	1357 Marigold Dr	American Construction Services	Plumbing	outside sewer & water laterals - 5'	-1	\$185.00
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7/29/2025	25592		Tom Noel	Plumbing	install sump pump	1,980	\$60.00
7/24/2025	25581	1245 Janette St	Mike Raddatz	Plumbing	Water Heater Replacement	2,954	\$60.00
7/17/2025	25564	423 Edward St	Doug & Pamela Yandry	Plumbing	2nd floor, tub to tub replacement. Same size and location.	826	\$60.00
7/11/2025	25545	626 Monroe St.	Troy Behrens	Plumbing	Full First Floor remodel: replace/update electrical devices and wiring, removing load bearing wall and replacing with double LVL 11 7/8" beam point loaded to existing post in basement, partially replace rotted exterior walls and floor system to back of home, Replace rotted roof in back of home, remove exterior door on second floor - replace with window, install exterior door on first floor in back of home, update existing HVAC, replace ALL existing plumbing throughout home.	18,000	\$136.25
7/7/2025	25528	318 Monroe St	A+ Enviromental	Plumbing	install shower 1st floor, move kitchen sink, clean up 1st floor plumbing	0	\$60.00
							\$561.25

Group Total: 6

Group: Private Driveway

7/31/2025	25615	1337 Jamesway	Zac Rueth	Private Driveway	Concrete Driveway and Approach	2,500	\$50.00
							\$50.00

Group Total: 1**Group: Right of Way Opening Permit**

7/24/2025	25577	1331 Erick St, Fort Atkinson	Matt Wilstein	Right of Way Opening Permit	New Driveway, sidewalk and approach	0	\$150.00
7/21/2025	25569	1104 S Main Street	Ron Jones	Right of Way Opening Permit	Driveway and city sidewalk	5,000	\$50.00
7/20/2025	25568	416 oakridge ct	Tim wing	Right of Way Opening Permit	Right of way	0	
7/17/2025	25565	416 oakridge ct.	Tim wing	Right of Way Opening Permit	City sidewalk and apron and Driveway	0	\$50.00
7/14/2025	25556	Erick St, Talcott Ave to W Rockwell Ave	City Project	Right of Way Opening Permit	Electric Paving Relocation - WR 5098711	0	\$50.00
7/14/2025	25555	423 WHITEWATER AVE	Fort Atkinson Historical Society	Right of Way Opening Permit	RETIRE GAS SERVICE WR# 5119724	0	\$50.00
7/14/2025	25554	415 McMillen st.	Elliott Larson	Right of Way Opening Permit	Driveway	5,000	\$50.00
7/9/2025	25532	1272 FARMCO LN		Right of Way Opening Permit	NEW 1"PE GAS SERVICE WR# 5109971	0	\$50.00
7/7/2025	25526	300 W MILWAUKEE AVE		Right of Way Opening Permit	REPLACE EXISTING SERVICE WR#5033088	0	\$50.00
7/3/2025	25520	1432 Endl Blvd	Matthew Dieter	Right of Way Opening Permit	Replacing portion of apron	0	\$50.00
							\$550.00

Group Total: 10**Group: Roofing/Siding**

7/31/2025	25616	1441 Endl Blvd	Victor Castaneda	Roofing/Siding	Re-Roof House & Detached Garage	9,663	\$60.00
7/30/2025	25601	85 Lucile St	Chad Dallman	Roofing/Siding	Re Shingle Roof	10,000	\$60.00
7/28/2025	25586	625 Grant St	AndrewSchroedl	Roofing/Siding	replacing house and detached garage roof	20,490	\$60.00

7/24/2025	25582	92 Jackson St	Luke W Slocum	Roofing/Siding	Re shingle Roof	9,795	\$60.00
7/24/2025	25580	212 Linden St	Gwenda Mattox	Roofing/Siding	Tear off and re-roof of detached garage- Tear off siding and re-side of front and back elevations of home	14,900	\$60.00
7/22/2025	25575	324 Riverside Dr	Tyler Tabor	Roofing/Siding	Remove and replace asphalt shingles according to the building code	9,259	\$60.00
7/22/2025	25574	104 E Hilltop Tr	Julie Gapp	Roofing/Siding	Re Shingle Roof	10,000	\$60.00
7/22/2025	25573	625 Cloute St	Jesse Brandt	Roofing/Siding	Roof	16,487	\$60.00
7/22/2025	25572	444 Raintree Dr	Manjit Singh	Roofing/Siding	Tear off and re-roof of home- Install new gutters	23,800	\$60.00
7/20/2025	25567	336 Jones Ave	Rock River Assets LLC	Roofing/Siding	New Roof, Siding & Windows	45,000	\$60.00
7/15/2025	25559	1003 Grove St	Patsy Rader	Roofing/Siding		18,458	\$60.00
7/11/2025	25553	304 Hickory St	Robert Seisser	Roofing/Siding	Re shingle Roof	10,000	\$60.00
7/11/2025	25552	1100 Riverside Dr	Gerald Freson	Roofing/Siding	Re shingle Roof	10,000	\$60.00
7/11/2025	25551	1007 Edgewater	Nancy A Quist	Roofing/Siding	Re shingle Roof	10,000	\$60.00
7/10/2025	25542	808 N Fourth St	andrew Heard	Roofing/Siding	Roof Replacement	15,000	\$60.00
7/10/2025	25541	112 N Third St	Gerald Meske	Roofing/Siding	Roof	13,900	\$60.00
7/10/2025	25540	204 Radloff St	Roy Magsamen	Roofing/Siding	Roof	14,900	\$60.00
7/9/2025	25535	510 Washington st	Dennis Verhalen	Roofing/Siding	Roof	18,700	\$60.00
7/9/2025	25534	518 E Sherman Ave	Dean Brown	Roofing/Siding	Roof	4,500	\$60.00
7/9/2025	25533	414 Edward St	Matt Narkis	Roofing/Siding	Roof replacement	10,900	\$60.00
7/9/2025	25531	1121 Arndt Ct	CHARLES HATLEN	Roofing/Siding	REMOVING AND REPLACING ROOF	18,000	\$60.00

7/3/2025	25517	17 Krause Ave	Steven Schuknecht	Roofing/Siding	Re Shingle	15,000	\$60.00
7/3/2025	25516	514 Shah Ave	Gregory Swingen	Roofing/Siding	Re Shingle	18,000	\$60.00
7/3/2025	25515	500 S Main St	Kloplic Enterprises	Roofing/Siding	Re shingle	15,000	\$60.00
7/3/2025	25514	1128 Adrian Blvd	Christine Beckman	Roofing/Siding	Re Shingle	15,000	\$60.00
							\$1,500.00

Group Total: 25

Group: ROW and Driveway

7/14/2025	25557	1400 Commonwealth	Jennifer howe	ROW and Driveway	Redoing existing driveway and apron	8,000	\$50.00
7/11/2025	25547	813 W Blackhawk Dr	Dean Hanke	ROW and Driveway	Concrete driveway	5,450	\$50.00
							\$100.00

Group Total: 2

Group: Shed

7/21/2025	25571	925 Lexington Blvd	Amanda Moehling	Shed	20 x 20 Prefabricated Ranch Style Garage on Existing Concrete Pad	20,780	\$255.00
7/9/2025	25537	608 Lexington Blvd	NICHOLAS L CONGDON	Shed	10x12 shed on concrete pad. See attached for shed information, location, and setback	4,000	\$60.00
7/3/2025	25519	412 N Fourth St	Alan Fehly	Shed	12x16 Storage Shed	8,000	\$60.00
7/2/2025	25498		Mark Potter	Shed	10 x 12 prefabricated wooden storage shed	5,757	
							\$375.00

Group Total: 4

Group: Sign

7/2/2025	25513	1515 Madison Ave	Verizon	Sign	Sign Installation	5,000	\$90.00
							\$90.00

Group Total: 1

Group: Single Family Alteration/Addition

7/24/2025	25579	94 Shirley St	Jim Marousis	Single Family Alteration/Addition	Roof Mounted PV Solar Installation; 11.0 Panels	8,420	\$119.00
7/24/2025	25578	313 W Milwaukee Ave	April Pulvermacher	Single Family Alteration/Addition	Roof Mounted PV Solar Installation; 11.0 Panels	8,420	\$119.00
7/16/2025	25563	34 Wilson Ave	Steve Wollin	Single Family Alteration/Addition	Roof Mounted PV Solar Installation: 19 Panels	12,886	\$163.00
7/5/2025	25524	626 Monroe St.	Troy Behrens	Single Family Alteration/Addition	Full First Floor remodel: replace/update electrical devices and wiring, removing load bearing wall and replacing with double LVL 11 7/8" beam point loaded to existing post in basement, partially replace rotted exterior walls and floor system to back of home, Replace rotted roof in back of home, remove exterior door on second floor - replace with window, install exterior door on first floor in back of home, update existing HVAC, replace ALL existing plumbing throughout home.	18,000	\$316.25
							\$717.25

Group Total: 4

Group: Windows/Doors

7/23/2025	25576	1110 Mc Coy Park Rd	Eric and Katherine Wixom	Windows/Doors	1 replacement patio door to be installed in the existing opening	5,000	\$60.00
7/20/2025	25566	816 N High St	Benjamin Leikness	Windows/Doors	Re shingle roof, new gutters, replace 21 windows, replace 2 interior doors, replace 2 exterior doors, replace interior window trim. repair deck, repair basement stairs.	50,000	\$60.00
							\$120.00

Group Total: 2

Group: Zoning

7/30/2025	25599	737 Reena Ave	FASP LLC	Zoning	Zoning Verification Letter	0	\$50.00
7/21/2025	25570	808 N Fourth St	Andrew A Heard	Zoning	Re shingle Roof	15,000	\$60.00
7/15/2025	25562		Nanette Congdon	Zoning	Replacing siding, doors, windows	50,198	
7/15/2025	25561	420 S High St	Lacy Plater	Zoning		15,176	
7/15/2025	25560	94 Shirley St	James J Marousis	Zoning	Re shingle Roof	16,321	\$60.00
							\$170.00

Group Total: 5

							\$13,417.25
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Total Records: 132

8/7/2025



Jedidiah Draeger
Director of Neighborhood and Building Services



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action relating to the City Clerk-issued License and Permit Report for July 2025 (Ebbert, Clerk/Treasurer/Finance Director)

BACKGROUND

The following is a list of the Licenses and Permits issued by the City Clerk for the period of July 15, 2025 through August 19, 2025 per the City of Fort Atkinson Municipal Code of Ordinances.

DISCUSSION

BEEKEEPING

None

OPERATOR

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

Applicant		Place of Employment	Recommended Approval by Police Department	Cost
Navjot	Singh	Sahib Enterprises	Y	\$25
Rebecca	Waters	220 Modern Kitchen	Y	\$25
Shalesa	Davis	Paddy Shack	Y	\$15
Kaitlyn	Weiler	Family Dollar	Y	\$15
Viridiana	Silva-Pacheco	Guanajuato Produce	Y	\$25
Deborah	Miller	Kwik Trip 439	Y	\$15
Darielka	Reyes Castillo	Guanajuato Produce	Y	\$15
Aditya	Dhammi	Sahib Enterprises	Y	\$25
Amber	Gwaltney	Fat Boyz	Y	\$25

MOBILE MERCHANT

Harry	Schroeder	Oakdale Farms	Y	\$50
Valdemar	Escobar	Chicken Palace	Y	\$50

DOOR-TO-DOOR RESIDENTIAL / DIRECT SELLER

Michael	Ehlers	Edward Jones	Y	\$50
David	Tejera	C&N Construction	Y	\$50

FINANCIAL ANALYSIS

In accordance with the City's Ordinances and Fee Schedule, a total of \$185.00 was collected for Operator's licenses, \$100 for Mobile Merchant Permits, and \$100.00 for Direct Seller's Permits.

RECOMMENDATION

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

ATTACHMENTS

None



POLICE DEPARTMENT

Adrian J. Bump
CHIEF OF POLICE

08-5-2025

To: Fort Atkinson City Council

From: Chief Adrian Bump

Trick or Treat & Trunk or Treat 2025

The purpose of this letter is to identify and recommended dates and times for Trick or Treat and Trunk or Treat in the City of Fort Atkinson in 2025.

Sunday, October 26, 2025, from 1:00pm-4:00pm would be an appropriate and safe time for Trick or Treat in the City. In addition to Trick or Treat, I think it is appropriate to set a tentative date for Trunk or Treat. The intended traditional focus of Trunk or Treat is to hold the event annually on Halloween. So, a recommendation to set the Trunk or Treat event for Friday, October 31, 2025, from 6:00pm-8:30pm at Jones Park would align with that tradition.

If City Council decides to identify a date and time for the events, additional police resources will be assigned to help increase safety in our residential neighborhoods and Jones Park for the date and times selected.

Respectfully submitted,

Adrian Bump
Chief of Police
City of Fort Atkinson



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action on a Special Event: Park & Recreation Adult Recess, Friday, September 12, 2025, 6-9 p.m. at Jones Park (Ebbert, Clerk/Treasurer/Finance Director)

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: Parks & Recreation Adult Recess

Date and Hours of Event: Friday, September 12, 2025 6:00 PM - 9:00 PM

Set Up & Tear Down: 4:00-5:30 p.m. and 9:00-9:30 p.m.

Location: Jones Park

Contact Person: Nash Christian

Estimated Number of Attendees: 100

The application and event information was routed to all City Departments without comments or concerns.

FINANCIAL ANALYSIS

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

RECOMMENDATION

Staff recommends that City Council approve the Special Event for Parks & Recreation Adult Recess on Friday, September 12, 2025 from 6:00 pm to 9:00 pm at Jones Park.

ATTACHMENTS

1. 2025 Adult Recess Special Event Application



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

Name of Business/Group Organizing Event:		
Contact Person for Event:		
Phone Number:	Email:	
Day of Event Contact Person (if different from above):	Phone:	Email:
Special Event Details		
Event Name:		
Event Date (mm/dd/yyyy):		
Event Location:		
Estimated Number of Attendees:	Hours of Event:	
Event Setup Time:	Event Tear Down Time:	
Event Description:		
Goal/Purpose of Event:		
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 <i>* If limited parking available, provide proof of permission from neighboring businesses/property to utilize their parking</i>	
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 ____ 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:	

☐ 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 <i>* Provide proof of permission from neighboring businesses/properties if street closure impacts daily activity</i>
☐ 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. <i>*Restroom Plan also required with sales of beer and/or wine. Refer to the Special Event Guide.</i>
☐ I will be erecting a tent, canopy or other temporary structure.*	 <i>*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>
☐ I am having a walk/race*	<i>*See map instructions above. In addition to the previously listed map requirements, clearly mark your walk/race route on the map.</i>
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: _____ 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:	



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action on a Special Event: The Chapel: Night of Worship, Sunday, September 14, 2025, from 6:30 to 8:00 p.m. at Barrie Park (Ebbert, Clerk, Treasurer, Finance Director)

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

The Chapel

Event: Night of Worship

Date and Hours of Event: Sunday, September 14, 2025

Setup: 2:30

Tear Down: 8:30

Location: Barrie Park

Contact Person:

Estimated Number of Attendees: 150

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 Chapel: Night of Worship, Sunday, September 14, 2025, from 6:30 to 8:00 p.m. at Barrie Park.

ATTACHMENTS

1. Special Event Night of Worship 9.14.25 Application



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

Name of Business/Group Organizing Event: The Chapel

Contact Person for Event: Taylor Carrizales

Phone Number: 9207282539

Email: taylorpaigeschwandt@gmail.com

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

Phone: 9207282539

Email:

Special Event Details

Event Name: Night of Worship

Event Date (mm/dd/yyyy): 09/14/2025

- Sunday

Event Location: Barrie Park

Estimated Number of Attendees: 150

Hours of Event: 6:30-8pm

Event Setup Time: 2:30

Event Tear Down Time: 8:30pm

Event Description: A night of worship music and prayer. We will have free ice cream and popcorn for the community.

Goal/Purpose of Event: An outdoor night of worship for our 3 campuses in Whitewater, Mt. Zion + Jefferson. All are welcome

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 ____

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

piano guitar bass drums - worship band

☒ 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: 6:30 End Time of Music: 8 pm

☐ 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.

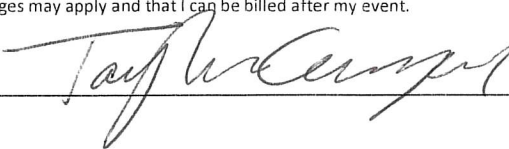
☐ I will be erecting a tent, canopy or other temporary structure.*
*Event coordinator is responsible for ensuring that the temporary structure is safely installed. Event Coordinator is required to contact Diggers Hotline at least 4 business days prior to the event. Diggershotline.com, 1-800-242-8511

☐ 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: Taylor Carrizales



Submission Date: 7/29/25

For Office Use Only:

Date Received: _____

Date Paid: _____

Council Approval / Denial Date: _____

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

Event Stipulations:



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action on a Special Event: Chamber of Commerce, Holiday Parade, Sunday, December 7, 2025, 4:00 p.m. - 6:00 p.m. (Ebbert, Clerk/Treasurer/Finance Director)

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: Holiday Parade

Dates and Hours of Event: Saturday, December 7, 2025

Set up will begin at 1:00 pm. Street Closures will begin at 4:00 pm and end approximately 15 minutes following the parade. Parade will begin at 4:30 pm

Locations: Staging at the Middle School and St. Paul's parking lots near 4th, East and Bluff Streets. At the end of the parade route floats will be routed down Adams and Lincoln towards Barrie Park. Large groups can unite at Barrie Park

Contact Person: Alli Thompson, projects@fortchamber.com

Estimated Number of Attendees: 2000

Event information was routed to Departments without comments or concerns.

FINANCIAL ANALYSIS

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

RECOMMENDATION

Staff recommends that City Council approve the **Chamber of Commerce, Holiday Parade**, Sunday, December 7, 2025, from 4:00 PM - 6:00 PM.

ATTACHMENTS

None



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Discussion and possible action relating to a Temporary Retailer's License for St. Joseph Catholic Church, St. Teresa of Calcutta Fall Festival on September 7, 2025 (Ebbert, Clerk/Treasurer/Finance Director)

BACKGROUND

The State of Wisconsin regulates alcohol licensing for local governments through Chapter 125. There are three classes of Licenses: Class A, Class B and Class C. "Class C" pertains strictly to wine with consumption on-site in a restaurant. The difference between Class A and B is where alcohol is authorized for sale and for consumption. Class A generally offers sale of alcohol on-site with consumption off-site (e.g. grocery or liquor store, gas station or convenience store). Class B allows for on-site sale and on-site consumption (e.g. Restaurant, Bar, Bowling Alley, Tavern). Class A can easily be remember as you consume alcohol *Away* from the premises. Likewise, Class B you consume on-site, for example *Bar*.

Alcohol licenses are further defined by the quotation marks used. For example, "Class A" refers to intoxicating liquor while Class "A" refers to fermented malt beverages. These licenses can also be issued together as a combination license, most common for grocery stores.

Temporary Class "B" (picnic) beer and/or wine licenses may sell fermented malt beverages to consumers at a picnic or similar gathering of limited duration. Such licenses may be issued only to bona fide clubs, chambers of commerce, county or local fair associations, agricultural societies, churches, lodges, societies, veteran's organizations that have been in existence for at least six months.

There is no limit to the number of Temporary Class "B" fermented malt beverage licenses that may be issued to an eligible organization in a calendar year. However, there is a limit of two Temporary "Class B" wine licenses that may be issued to an eligible organization in a 12-month period.

Temporary license holders must have licensed operators (bartenders) and they must purchase their products from a Distributor/Wholesaler.

DISCUSSION

Organization: St. Joseph's Catholic Church

Street Location: 1650-1660 Endl Blvd

Manager of affair: Andrew Koehler

Name of Event: St. Teresa of Calcutta Fall Festival

Date of Event: September 7, 2025

Premises: 1650-1660 Endl Blvd

The Named Organization Applied for the Following License(s): Class "B" Fermented Malt Beverage License

FINANCIAL ANALYSIS

There is a \$10.00 license fee per Application for Temporary Retailer's License. Publication is not required for these licenses.

RECOMMENDATION

Staff recommends that the City Council approve the Temporary Class B Retailer's License to sell beer at the St. Joseph Fall Festival at 1650-1660 Endl Blvd on September 7, 2025 contingent upon having licensed operators and purchasing products from a Wisconsin beverage distributor.

ATTACHMENTS

1. St Joseph Temp Class B License Application 9.7.25

License(s) Requested	Fees	
☐ Temporary "Class B" Wine	License Fees	\$ 10.00
☒ Temporary Class "B" Beer	Background Check	\$
	Total Fees	\$ 10.00

Part A: Organization Information

1. Organization Name St Joseph Catholic Church		
2. Organization Permanent Address 1660 Endl Blvd.		
3. City Ft. Atkinson	4. State WI	5. Zip Code 53538
6. Mailing Address (if different from permanent address)		
7. FEIN 39-0813444	8. Date of Organization/Incorporation 1884	9. State of Organization/Incorporation WI
10. Phone (920) 222-0099	11. Email akoehler@stjosephfort.org	
12. Organization type (check one) ☐ Bona Fide Club ☒ Church ☐ Fair Association/Agricultural Society ☐ Veteran's Organization ☐ Lodge/Society ☐ Chamber of Commerce or similar Civic or Trade Organization under ch. 181, Wis. Stats.		
13. Is this organization required to hold a Wisconsin Seller's permit? ☐ Yes ☒ No		
14. Wisconsin Seller's Permit Number (if applicable)		

Part B: Individual Information

List the name, title, and phone number for all officers, directors, and agent of the organization. Include an Individual Questionnaire (Form AB-100) for each person listed below. Attach additional sheets if necessary.

Corporations must also include Alcohol Beverage Appointment of Agent (Form AB-101).

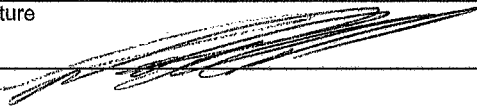
Last Name	First Name	Title	Phone
Heiar	Donn	President	(920) 563-3029
Koehler	Andrew	Vice President	(920) 222-0099
Kersten	Vicki	Treasurer	(608) 449-6530
Voss	Tim	Secretary	(920) 723-3084

Continued →

Part C: Event Information

1. Name of Event (If applicable) St. Teresa of Calcutta Fall Festival			
2. Dates of Operation 9/7/2025		3. Hours of Operation 11am -6pm	
4. Premises Address 1650 & 1660 Endl Blvd			
5. City Fort Atkinson		6. State WI	7. Zip Code 53538
8. County Jefferson	9. Governing Municipality ☒ City ☐ Town ☐ Village of: Fort Atkinson		10. Aldermanic District
11. Organizer of Event (If not the named applicant)		12. Email and/or Phone Number for Organizer of Event akoehler@stjosephfort.org	
13. Organizer Website		14. Event Website	
15. Premises Description - Describe the building or buildings and any outside areas where alcohol beverages and records are sold, stored, or consumed, and related records are kept. Describe all rooms within the building, including living quarters. Authorized alcohol beverage activities and storage of records may occur only on the premises described in this application. Attach a map or diagram and additional sheets if necessary. School hallway, gymnasium, and parish hall plus parking lot and playground area.			

Part D: Attestation

Who must sign this application? • one officer or director of the nonprofit organization		
READ CAREFULLY BEFORE SIGNING: Under penalty of law, I have answered each of the above questions completely and truthfully. I agree that I am acting solely on behalf of the applicant organization and not on behalf of any other individual or entity seeking the license. Further, I agree that the rights and responsibilities conferred by the license(s), if granted, will not be assigned to another individual or entity. I agree to operate according to the law, including but not limited to, purchasing alcohol beverages from Wisconsin-permitted wholesalers. I understand that lack of access to any portion of a licensed premises during inspection will be deemed a refusal to allow inspection. Such refusal is a misdemeanor and grounds for revocation of this license. I understand that any license issued contrary to Wis. Stat. Chapter 125 shall be void under penalty of state law. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000 if convicted.		
Last Name Koehler	First Name Andrew	M.I. J
Title Vice President	Email akoehler@stjosephfort.org	Phone (920) 222-0099
Signature 		Date 08/07/20

Part E: For Clerk Use Only

Date Application Was Filed With Clerk	License Number
Date License Granted	Date License Issued
Signature of Clerk/Deputy Clerk	



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to a Resolution Extending the life of Tax Incremental District #6 for one year to fund Affordable Housing Programs and Projects within the City of Fort Atkinson, Wisconsin (Houseman, City Manager)

BACKGROUND

The City of Fort Atkinson has four active Tax Increment Districts. Annually, the Joint Review Board (JRB) meets to review the reports filed by the City to the Department of Revenue relating to the status of each TID. The JRB includes representatives from each of the four taxing jurisdictions and a public member. This body will meet on August 18, 2025, and is expected to approve the TID reports for TIDs 6, 7, 9, and 10. These reports are attached to this document for review.

The City held a TID workshop on August 20, 2024. The City's financial advisors from Baird presented a long-term plan for the City's TIDs, including the closure of TID 8 in April 2025 and the planned closure of TIDs 6 and 7 in 2026. Wisconsin statutes allow municipalities to extend the life of a TID for up to one year, using the last year of tax increment to improve the City's housing stock. The option has been discussed at each of the last four JRB meetings with representatives from the taxing jurisdictions. While the JRB does not have direct authority over exercising the affordable housing option, all members have been supportive. Note that the City Council approved a resolution extending the life of TID 8 in 2024 to start the affordable housing fund.

DISCUSSION

Wisconsin statutes (66.1105(6)(g)) allows the extension of a TID up to one year, using the last year of tax increment to improve the City's housing stock. At least 75% of the increment must benefit affordable housing with the remaining portion used to improve housing stock.

"Affordable Housing" is defined by Wis. Stats. 66.1105(2)(ab) as housing that costs a household no more than 30 percent of the household's gross monthly income.

In order to extend the life of the TID, the City Council must adopt a Resolution declaring such by September 1st. Per the timeline included with the background information, the Council would

then adopt a resolution terminating TIDs 6 and 7 in April 2026. City staff plans to start the process of creating new TIDs in the undeveloped and underdeveloped areas from TIDs 6 and 7 in 2026.

FINANCIAL ANALYSIS

The act of extending the life of TID 6 for an affordable housing program will provide approximately \$160,171.82 for affordable housing efforts in 2026. The act of extending the life of TID 7 will provide approximately \$460,106.39 for affordable housing efforts in 2026. The City Council and staff discussed potential programs and terms at a workshop in 2024, but programs and policies for this fund have not been approved. Staff has not had time to dedicate to these efforts so far in 2025 and has reached out to a consultant to assist. More information and a potential scope of services will likely be provided to the City Council in the coming months.

Table 1: Anticipated Revenues	
Revenue Source	Anticipated Amount
TID No. 8 - 2025 Increment	\$ 1,108,438.11
TID No. 7 - 2026 Increment*	\$ 460,106.39
TID No. 6 - 2026 Increment*	\$ 160,171.82
Anticipated Total	\$ 1,728,716.33

*Assumes 2024 gross tax rate of \$19.38 per \$1,000 of equalized value

RECOMMENDATION

Staff recommends that the City Council adopt the Resolution extending the life of Tax Increment District No. 6 for one year to fund affordable housing programs and projects within the City of Fort Atkinson, Wisconsin.

Staff recommends that the City Council adopt the Resolution extending the life of Tax Increment District No. 7 for one year to fund affordable housing programs and projects within the City of Fort Atkinson, Wisconsin.

ATTACHMENTS

1. TID 6 Affordable Housing Resolution 8.19.25
2. TID 7 Affordable Housing Resolution 8.19.25
3. 8.18.25 JRB Memo and 2024 TID Reports

RESOLUTION NO. 2025-_____

A RESOLUTION EXTENDING THE LIFE OF TAX INCREMENTAL DISTRICT NO. 6 (TID NO. 6) FOR ONE YEAR TO FUND AFFORDABLE HOUSING PROGRAMS AND PROJECTS WITHIN THE CITY OF FORT ATKINSON, WISCONSIN

WHEREAS, the City of Fort Atkinson created TID #6 on January 18, 2000, and successfully completed implementation of certain elements of the project plan; and

WHEREAS, sufficient increment was collected from the 2024 tax roll to pay off its aggregate project costs and other obligations; and

WHEREAS, state law requires termination of a TID after all project costs have been paid, state law (sec. 66.1105(6)(g), Wis. Stats.), does allow extension of a TID up to one year, using the last year of tax increment to improve the City's housing stock; and

WHEREAS, at least 75 percent of the final increment must benefit affordable housing with the remaining portion used to improve housing stock.

NOW, THEREFORE, BE IT RESOLVED, that the City of Fort Atkinson, Wisconsin, hereby extends the life of TID #6 for up to 12 months to use the final year's increment collected in 2026 from the 2025 tax roll to benefit affordable housing; and

BE IT FURTHER RESOLVED, that the City of Fort Atkinson shall use the final increment to improve housing quality and affordability by developing and implementing a program with one or more of the following elements: down payment assistance, construction incentives, investment in public infrastructure, and/or home improvement grants; and

BE IT FURTHER RESOLVED, that the City of Fort Atkinson shall notify the Wisconsin Department of Revenue by providing a copy of this resolution.

Adopted this 19th day of August 2025.

City of Fort Atkinson City Council

Kyle Jaeckel, Council President

ATTEST:

Michelle Ebbert, Clerk/Treasurer/Finance Director

RESOLUTION NO. 2025-_____

A RESOLUTION EXTENDING THE LIFE OF TAX INCREMENTAL DISTRICT NO. 7 (TID NO. 7) FOR ONE YEAR TO FUND AFFORDABLE HOUSING PROGRAMS AND PROJECTS WITHIN THE CITY OF FORT ATKINSON, WISCONSIN

WHEREAS, the City of Fort Atkinson created TID #7 on January 18, 2000, amended it on May 13, 2003 and again on June 21, 2011, and successfully completed implementation of certain elements of the project plan; and

WHEREAS, sufficient increment was collected from the 2024 tax roll to pay off its aggregate project costs and other obligations; and

WHEREAS, state law requires termination of a TID after all project costs have been paid, state law (sec. 66.1105(6)(g), Wis. Stats.), does allow extension of a TID up to one year, using the last year of tax increment to improve the City's housing stock; and

WHEREAS, at least 75 percent of the final increment must benefit affordable housing with the remaining portion used to improve housing stock.

NOW, THEREFORE, BE IT RESOLVED, that the City of Fort Atkinson, Wisconsin, hereby extends the life of TID #7 for up to 12 months to use the final year's increment collected in 2026 from the 2025 tax roll to benefit affordable housing; and

BE IT FURTHER RESOLVED, that the City of Fort Atkinson shall use the final increment to improve housing quality and affordability by developing and implementing a program with one or more of the following elements: down payment assistance, construction incentives, investment in public infrastructure, and/or home improvement grants; and

BE IT FURTHER RESOLVED, that the City of Fort Atkinson shall notify the Wisconsin Department of Revenue by providing a copy of this resolution.

Adopted this 19th day of August 2025.

City of Fort Atkinson City Council

Kyle Jaeckel, Council President

ATTEST:

Michelle Ebbert, Clerk/Treasurer/Finance Director



MEMORANDUM

DATE: August 18, 2025

TO: Committee/Commission/Board

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to the 2024 Annual Report for Tax Increment District 6

BACKGROUND

2015 Act 257 was enacted by the Wisconsin Legislature on March 1, 2026, and requires municipalities that have Tax Incremental Financing Districts (TIDs) to have a standing Joint Review Board (JRB) in existence for the entire time that any TID exists. It also requires that the standing JRB, which is made up of representatives from the overlaying taxing jurisdictions, meet annually to review the TID report that describes the status of each TID located in that municipality. The law further requires that the JRB meet on July 1st or as soon as the updated annual report becomes available. The annual report must include several financial metrics in order to demonstrate the TID's performance over time, and that report must be filed with the Wisconsin Department of Revenue (DOR) by July 1st annually. The reports for the City's TIDs have been filed with the DOR and are attached to this memo for review by the JRB.

This memo includes information relating to the next four agenda items and recommends one action to approve the annual reports for TIDs 6, 7, 8, 9, and 10.

DISCUSSION

The City of Fort Atkinson has five (5) Tax Incremental Financing Districts. TID No. 6 was created in 2000 and consists of the Klement Business Park. TID No. 7 was created in 2000 and consists of the City's Downtown area. TID No. 8 was created in 2009 and includes the newly developed area along Madison Street and the Hwy 26 bypass. TID No. 9 was created in 2023 and consists of the undeveloped and underdeveloped land on the northwest side of the City. TID No. 10 was created in 2023 and consists of land on the northeast side of the City.

These TIDs were created pursuant to a law enacted to provide a process by which local units of government could finance public works or improvements in blighted areas from taxes levied by county, city, schools and other local jurisdictions based on the increase in property values within a designated geographic area. When a TID is established, the state determines the aggregate value of taxable property located within the district (base value). Taxes derived from levies by all local jurisdictions on property values exceeding the base value determined by the

state are allocated to the City for financing improvements within the district (increment).

TID NO. 6

TID No. 6 was created as an Industrial TID on January 18, 2000. 2018 was the last year to incur TIF-related costs. This TID has been designated as a “distressed TID” which allows the City to extend its life by 10 years to recover the costs associated with the improvements to the TID. This designation also allows the City’s other TIDs (No. 7 and No. 8) to donate excess increment to this TID. In 2024, TID No. 7 allocated \$445,853 and TID No. 8 allocated \$1,283,476 to TID No. 6. This TID is required to close by 2033; however, it may be terminated early if/when all costs are recovered. Per the Current Status document prepared by the City’s Financial Advisors, TID No. 6 is expected to recover all funds in 2025.

At the end of 2024, there was a positive fund balance of \$1,081,134 in the TID, which will be used in 2025 to pay back the General Fund for financial support throughout its life. All debt is scheduled to be paid off in 2025. The City Council may extend the life of TID 6 for one year to gather increment for the Affordable Housing Fund with potential closure in 2026.

Per the attached closure timeline document, this body may begin to create a new TID in this area in 2026. Creating a new TID may incentivize further development in the Klement Business Park. Lots 12 and 13 were sold to Wisconsin Development Corporation in July 2025 with the intention to construct an industrial flex spec building. Construction is planned to begin in spring 2026.

TID NO. 7

TID No. 7 was created as a Blight Elimination TID on January 18, 2000. 2022 was the last year to incur TIF-related costs. As such, no new projects, incentives, or financing may be implemented. This TID was scheduled to close in 2027; however, because it has been designated as a Donor to Distressed TID No. 6, its life can be extended to 2033, consistent with a maximum legal life of the TID of 27 years plus 6 years as a Donor to Distressed.

At the end of 2024, there was a nominal positive balance of \$9,859 in this TID. This TID will remain open to support TID 6, which will likely close in 2026. Future plans for this TID include extending its life for a year to gather increment for the Affordable Housing Fund and closure in 2026. There is an opportunity in 2026 to create one or more new downtown TIDs to incentivize development and redevelopment opportunities and facilitate public improvements, such as those identified in the City's Main Street Corridor Planning project.

TID NO. 8

TID No. 8, known as the NW Corridor Development TID, was created on September 15, 2009, as a Mixed Use TID. This TID stands out as the city's most successful.

Beginning 2024 with a balance of \$1,306,330, TID No. 8 saw revenues of \$1,041,582, which included a tax increment of \$970,153 and investment income of \$65,301. Expenditures totaled \$2,347,912 for the year, creating an end-of-year balance of \$0 in preparation of closing. In

August 2024, the City Council adopted a Resolution extending the life of the TID for a year to support the Affordable Housing Fund. In April 2025, the City Council adopted a Resolution closing this TID.

TID NO. 9

In late 2022, the Joint Review Board approved a new mixed-use TID (TID No. 9), which overlays TID No. 8, and includes recently annexed land as well as undeveloped and underdeveloped land. This TID was created to support the development of the City-owned land along Banker Road, as well as additional major projects as described in the Project Plan. The JRB approved the TID and Project Plan on November 1, 2022, and the TID was established in 2023.

The fund balance at the beginning of 2024 was -\$17,750 due to creation and administrative costs. The ending fund balance in 2024 was \$3,298,282, which is restricted to be used for public infrastructure in the TID.

In December 2024, the City Council entered into a Development Agreement with Intrepid Investments to develop about 40 acres of land with new residential units, including an 87-unit apartment building, townhomes, and single-family homes. The City has borrowed funds through a Note Anticipation Note, as well as funds from the City's general fund and wastewater utility fund, to pay for certain public infrastructure, which is currently under construction. City staff anticipates additional projects in this TID in 2025 and beyond.

TID NO. 10

TID No. 10 was created as a Blight Elimination TID in November 2022, with values established on January 1, 2023. TID No. 10 in Fort Atkinson is projected to run until 2050, with the final tax collection slated for 2051. The expenditure period will end in 2043.

The first project within TID No. 10 was an effort from Forth HealthCare to move four houses to make room for an expanded parking lot located adjacent to the hospital and outside the TID No. 10 boundaries. The City and Fort HealthCare are working on a Development Agreement so that the TID can pay back a portion of the cost of the road infrastructure necessary to support the relocation of the houses. In addition to those houses, this project created a vacant duplex lot, which Fort HealthCare has sold to Habitat for Humanity of Waukesha and Jefferson Counties on which a duplex will be constructed in 2025.

The beginning balance in TID 10 was -\$17,308, and the ending balance was -\$25,486. Staff anticipates additional projects in TID #10 in the coming years and is not concerned about the negative fund balance.

FINANCIAL ANALYSIS

Tax Incremental District	12/31/2024 Ending Balance
TID No. 6	\$1,081,135
TID No. 7	\$9,859
TID No. 8	\$0

TID No. 9	\$3,298,282 (restricted)
TID No. 10	(\$25,486)

RECOMMENDATION

Staff recommends the Joint Review Board take one action to approve the annual reports for TIDs 6, 7, 8, 9, and 10.

ATTACHMENTS

1. 28226-TID006-Annual Report-2024
2. tif6 proforma fort atkinson cy jrb 2025 71525
3. 28226-TID007-Annual Report-2024
4. tif7 proforma fort atkinson cy jrb 2025 71525
5. 28226-TID008-Annual Report-2024
6. tif8 proforma fort atkinson cy jrb 2025 71525
7. Res 1422 TID 8 Extend Housing Program
8. Res 1435 TID #8 Termination
9. PE-223 Terminated TID - Signed
10. 28226-TID009-Annual Report-2024
11. tif9 proforma JRB 2025 71525
12. 28226-TID010-Annual Report-2024
13. tif10 proforma JRB 2025 71525
14. TIF Housing and Closure timeline COFA

Form PE-300		TID Annual Report			2024 WI Dept of Revenue	
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Section 1 – Municipality and TID						
Co-muni code	Municipality		County	Due date	Report type	
28226	FORT ATKINSON		JEFFERSON	07/01/2025	ORIGINAL	
TID number	TID type	TID name	Creation date	Mandatory termination date	Anticipated termination date	
006	4D	Klement Business Park	01/18/2000	01/18/2033	04/07/2026	

Section 2 – Beginning Balance		Amount
TID fund balance at beginning of year		\$-816,304

Section 3 – Revenue		Amount
Tax increment		\$150,650
Investment income		\$53,774
Debt proceeds		\$0
Special assessments		\$0
Shared revenue		\$1,720
Sale of property		\$0
Allocation from another TID		
TID number	007	\$445,853
TID number	008	\$1,283,476
Developer guarantees		
Transfer from other funds		
Grants		
Other revenue		
Source	LAND RENT	\$13,591
Source	INTEREST INCOME ON LEASES	\$603
Total Revenue (deposits)		\$1,949,667

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 4 – Expenditures	Amount
Capital expenditures	
Administration	\$8,028
Professional services	
Interest and fiscal charges	
DOR fees	\$150
Discount on long-term debt	
Debt issuance costs	
Principal on long-term debt	\$44,050
Environmental costs	
Real property assembly costs	
Allocation to another TID	
Developer grants	
Developer name N/A	\$0
Transfer to other funds	
Other expenditures	
Total Expenditures	\$52,228

Section 5 – Ending Balance	Amount
TID fund balance at end of year	\$1,081,135
Future costs	\$0
Future revenue	
Surplus or deficit	\$1,081,135

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 6 – TID New Construction

Current Year TID New Construction Values				
TID	TID New Construction Increase	TID New Construction Decrease	Prior Year Correction	TID Net New Construction (NNC)
006	\$0	\$0	\$0	\$0
007	\$73,600	\$0	\$0	\$73,600
008	\$1,695,100	\$0	\$-238,400	\$1,456,700
009	\$0	\$0	\$0	\$0
010	\$1,316,000	\$0	\$0	\$1,316,000
Total	\$3,084,700	\$0	\$-238,400	\$2,846,300

Current Year Allowable Levy Increase Attributable to TID NNC					
TID	TID Net New Construction	Prior Year Municipal Equalized Value	TID Net New Construction %	Prior Year Adjusted Actual Levy	Allowable Levy Increase Attributable to TID Net New Construction
006	\$0	\$1,352,486,400	0.00	\$7,399,314	\$0
007	\$73,600	\$1,352,486,400	0.01	\$7,399,314	\$740
008	\$1,456,700	\$1,352,486,400	0.11	\$7,399,314	\$8,139
009	\$0	\$1,352,486,400	0.00	\$7,399,314	\$0
010	\$1,316,000	\$1,352,486,400	0.10	\$7,399,314	\$7,399
Total	\$2,846,300	\$1,352,486,400	0.22	\$7,399,314	\$16,278

Current Year Actual TID NNC Impact to Municipal Levy	
Levy Increase Attributable to TID Net New Construction	Increase per \$100,000
\$11,775	\$0.11775

Historical Allowable Levy Increase Attributable to TID NNC						
Year	TID	TID Net New Construction	Prior Year Municipal Equalized Value	TID Net New Construction %	Prior Year Adjusted Actual Levy	Allowable Levy Increase Attributable to TID Net New Construction
2023	006	\$0	\$1,257,936,500	0.00	\$7,359,134	\$0
2023	007	\$0	\$1,257,936,500	0.00	\$7,359,134	\$0
2023	008	\$2,050,000	\$1,257,936,500	0.16	\$7,359,134	\$11,775
2023	Total	\$2,050,000	\$1,257,936,500	0.16	\$7,359,134	\$11,775

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 7 – Preparer/Contact Information	
Preparer name Michelle Ebbert	Preparer title Clerk/Treasurer
Preparer email mebbert@fortatkinsonwi.gov	Preparer phone (920) 397-9901
Contact name Rebecca Houseman	Contact title City Manager
Contact email rhouseman@fortatkinsonwi.gov	Contact phone (920) 397-9901

Submission Information	
Co-muni code	28226
TID number	006
Submission date	03-24-2025 02:51 PM
Confirmation	TIDAR20240780O1741877965741
Submission type	ORIGINAL

Current Status

City of Fort Atkinson
Tax Incremental District # 6
Cash Flow Proforma Analysis

Assumptions	
Annual Inflation During Life of TID.....	0.00%
2024 Gross Tax Rate (per \$1000 Equalized Value)...	\$19.38
Annual Adjustment to tax rate.....	0.00%
Investment rate.....	0.50%
Data above dashed line are actual	

Background Data				RECIPIENT							Expenditures					TID Status				
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	(m)	(n)	(o)	(p)	(q)	(r)	(s)		
TIF District Valuation	Construction Increment	TIF Increment Over Base	Tax Rate	Tax Revenue	Miscellaneous/ Intergovernmental Revenue	Investment Proceeds	Transfers from Donor TID 7	Transfers from Donor TID 8	Land Sales	Total Revenues	Existing Debt Service	GF Advances	Admin. Costs	Transfer to Affordable Housing Fund	Combined Expenditures	Annual Balance	Year End Cumulative Balance	Cost Recovery	Year	
(January 1)																	(December 31)			
Base Value \$1,135,400																				
2024	\$8,207,900		\$7,072,500	\$19.38	\$150,651	\$15,311	\$54,377	\$445,853	\$1,283,476		\$1,949,668	\$44,050	\$0	\$8,179		\$52,229	\$1,897,439	\$1,081,134		2024
2025	\$8,207,900		\$7,072,500	\$19.38	\$137,065		\$5,406	\$88,927		\$305,459	\$536,856	\$130,675	\$1,472,315	\$15,000		\$1,617,990	(\$1,081,134)	\$0		2025
2026	\$8,207,900		\$7,072,500	\$19.38	\$137,065		\$0				\$137,065				\$137,065	\$137,065	\$0	\$0		2026
				\$424,781	\$15,311	\$59,783	\$534,780	\$1,283,476	\$305,459	\$2,623,589	\$174,725	\$1,472,315	\$23,179	\$137,065	\$1,807,284					

Type of TID: Industrial (Distressed)
2000 TID Inception (1/18/2000)
2018 Final Year to Incur TIF Related Costs
2026 TID Closure/Affordable Housing Extension

Assumes debt payoff in 2025 or held in account and finalized on 2/1/2027.

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 1 – Municipality and TID					
Co-muni code 28226	Municipality FORT ATKINSON		County JEFFERSON	Due date 07/01/2025	Report type ORIGINAL
TID number 007	TID type 2	TID name Downtown Econ Development	Creation date 01/18/2000	Mandatory termination date 01/18/2033	Anticipated termination date 04/07/2026

Section 2 – Beginning Balance	Amount
TID fund balance at beginning of year	\$3,633

Section 3 – Revenue	Amount
Tax increment	\$453,726
Investment income	\$3,602
Debt proceeds	
Special assessments	
Shared revenue	\$3,539
Sale of property	
Allocation from another TID	
Developer guarantees	
Transfer from other funds	
Grants	
Other revenue	
Total Revenue (deposits)	\$460,867

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 4 – Expenditures	Amount
Capital expenditures	
Administration	\$8,788
Professional services	
Interest and fiscal charges	
DOR fees	
Discount on long-term debt	
Debt issuance costs	
Principal on long-term debt	
Environmental costs	
Real property assembly costs	
Allocation to another TID	
TID number 006	\$445,853
Developer grants	
Developer name N/A	\$0
Transfer to other funds	
Other expenditures	
Total Expenditures	\$454,641

Section 5 – Ending Balance	Amount
TID fund balance at end of year	\$9,859
Future costs	\$0
Future revenue	
Surplus or deficit	\$9,859

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 6 – TID New Construction

Current Year TID New Construction Values				
TID	TID New Construction Increase	TID New Construction Decrease	Prior Year Correction	TID Net New Construction (NNC)
006	\$0	\$0	\$0	\$0
007	\$73,600	\$0	\$0	\$73,600
008	\$1,695,100	\$0	\$-238,400	\$1,456,700
009	\$0	\$0	\$0	\$0
010	\$1,316,000	\$0	\$0	\$1,316,000
Total	\$3,084,700	\$0	\$-238,400	\$2,846,300

Current Year Allowable Levy Increase Attributable to TID NNC					
TID	TID Net New Construction	Prior Year Municipal Equalized Value	TID Net New Construction %	Prior Year Adjusted Actual Levy	Allowable Levy Increase Attributable to TID Net New Construction
006	\$0	\$1,352,486,400	0.00	\$7,399,314	\$0
007	\$73,600	\$1,352,486,400	0.01	\$7,399,314	\$740
008	\$1,456,700	\$1,352,486,400	0.11	\$7,399,314	\$8,139
009	\$0	\$1,352,486,400	0.00	\$7,399,314	\$0
010	\$1,316,000	\$1,352,486,400	0.10	\$7,399,314	\$7,399
Total	\$2,846,300	\$1,352,486,400	0.22	\$7,399,314	\$16,278

Current Year Actual TID NNC Impact to Municipal Levy	
Levy Increase Attributable to TID Net New Construction	Increase per \$100,000
\$11,775	\$0.11775

Historical Allowable Levy Increase Attributable to TID NNC						
Year	TID	TID Net New Construction	Prior Year Municipal Equalized Value	TID Net New Construction %	Prior Year Adjusted Actual Levy	Allowable Levy Increase Attributable to TID Net New Construction
2023	006	\$0	\$1,257,936,500	0.00	\$7,359,134	\$0
2023	007	\$0	\$1,257,936,500	0.00	\$7,359,134	\$0
2023	008	\$2,050,000	\$1,257,936,500	0.16	\$7,359,134	\$11,775
2023	Total	\$2,050,000	\$1,257,936,500	0.16	\$7,359,134	\$11,775

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 7 – Preparer/Contact Information	
Preparer name Michelle Ebbert	Preparer title Clerk/Treasurer
Preparer email mebbert@fortatkinsonwi.gov	Preparer phone (920) 397-9901
Contact name Rebecca Houseman	Contact title City Manager
Contact email rhouseman@fortatkinsonwi.gov	Contact phone (920) 397-9901

Submission Information	
Co-muni code	28226
TID number	007
Submission date	03-24-2025 02:52 PM
Confirmation	TIDAR20240780O1741879148237
Submission type	ORIGINAL

Current Status

City of Fort Atkinson Tax Increment District No. 7 Cash Flow Proforma Analysis

Assumptions	
Annual Inflation During Life of TID.....	0.00%
2024 Gross Tax Rate (per \$1000 Equalized Value)....	\$19.38
Annual Adjustment to tax rate.....	0.00%
Investment rate.....	0.50%
Data above dashed line are actual	

Background Data				Revenues				DONOR Expenditures					TID Status			Year
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	(m)	(n)	(o)	(p)	
TIF District Valuation	Construction Increment	TIF Increment Over Base	Tax Rate	Tax Revenue	Intergovernmental Revenues	Investment Proceeds	Total Revenues	Transfer to Affordable Housing Fund	Capital Outlay	Transfers to Recipient TID 6	Admin. Costs	Combined Expenditures	Annual Balance	Year End Cumulative Balance	Cost Recovery	
(January 1)													(December 31)			
Base Value																
\$11,587,900																
2024	\$31,307,800		\$19.38	\$453,726	\$3,539	\$3,602	\$460,867		\$8,027	\$445,853	\$760	\$454,640	\$6,227	\$9,860	Per 2024 Audit	2024
2025	\$31,307,800		\$19.38	\$382,172		\$49	\$382,221			\$88,927	\$35,000	\$123,927	\$258,294	\$268,154	Expenditures Recovered	2025
2026	\$31,307,800		\$19.38	\$382,172		\$1,341	\$383,512	\$382,172			\$0	\$382,172	\$1,340	\$269,495	Expenditures Recovered	2026
				\$1,218,069	\$3,539	\$4,992	\$1,226,600	\$382,172	\$8,027	\$534,780	\$35,760	\$960,739				

Type of TID: Blight Elimination
 2000 TID Inception (1/18/2000)
 2022 Final Year to Incur TIF Related Costs
 2026 TID Closure/Affordable Housing Extension

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 1 – Municipality and TID					
Co-muni code 28226	Municipality FORT ATKINSON		County JEFFERSON	Due date 07/01/2025	Report type ORIGINAL
TID number 008	TID type 6	TID name NW Corridor Development	Creation date 09/15/2009	Mandatory termination date 04/15/2025	Anticipated termination date 04/01/2025

Section 2 – Beginning Balance	Amount
TID fund balance at beginning of year	\$1,306,330

Section 3 – Revenue	Amount
Tax increment	\$970,153
Investment income	\$65,301
Debt proceeds	
Special assessments	
Shared revenue	\$6,128
Sale of property	
Allocation from another TID	
Developer guarantees	
Transfer from other funds	
Grants	
Other revenue	
Total Revenue (deposits)	\$1,041,582

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 4 – Expenditures	Amount
Capital expenditures	\$0
Administration	\$8,028
Professional services	
Interest and fiscal charges	
DOR fees	\$574
Discount on long-term debt	
Debt issuance costs	\$95,642
Principal on long-term debt	
Environmental costs	
Real property assembly costs	
Allocation to another TID	
TID number 006	\$1,283,476
Developer grants	
Developer name GARRISON HOLDINGS	\$48,110
Transfer to other funds	
Fund FUND 4 - DEBT SERVICE - BORROWING	\$871,540
Other expenditures	
Name STREET LIGHTS AND STREET IMPROVEMENTS	\$40,542
Total Expenditures	\$2,347,912

Section 5 – Ending Balance	Amount
TID fund balance at end of year	\$0
Future costs	\$0
Future revenue	
Surplus or deficit	\$0

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 6 – TID New Construction

Current Year TID New Construction Values				
TID	TID New Construction Increase	TID New Construction Decrease	Prior Year Correction	TID Net New Construction (NNC)
006	\$0	\$0	\$0	\$0
007	\$73,600	\$0	\$0	\$73,600
008	\$1,695,100	\$0	\$-238,400	\$1,456,700
009	\$0	\$0	\$0	\$0
010	\$1,316,000	\$0	\$0	\$1,316,000
Total	\$3,084,700	\$0	\$-238,400	\$2,846,300

Current Year Allowable Levy Increase Attributable to TID NNC					
TID	TID Net New Construction	Prior Year Municipal Equalized Value	TID Net New Construction %	Prior Year Adjusted Actual Levy	Allowable Levy Increase Attributable to TID Net New Construction
006	\$0	\$1,352,486,400	0.00	\$7,399,314	\$0
007	\$73,600	\$1,352,486,400	0.01	\$7,399,314	\$740
008	\$1,456,700	\$1,352,486,400	0.11	\$7,399,314	\$8,139
009	\$0	\$1,352,486,400	0.00	\$7,399,314	\$0
010	\$1,316,000	\$1,352,486,400	0.10	\$7,399,314	\$7,399
Total	\$2,846,300	\$1,352,486,400	0.22	\$7,399,314	\$16,278

Current Year Actual TID NNC Impact to Municipal Levy	
Levy Increase Attributable to TID Net New Construction	Increase per \$100,000
\$11,775	\$0.11775

Historical Allowable Levy Increase Attributable to TID NNC						
Year	TID	TID Net New Construction	Prior Year Municipal Equalized Value	TID Net New Construction %	Prior Year Adjusted Actual Levy	Allowable Levy Increase Attributable to TID Net New Construction
2023	006	\$0	\$1,257,936,500	0.00	\$7,359,134	\$0
2023	007	\$0	\$1,257,936,500	0.00	\$7,359,134	\$0
2023	008	\$2,050,000	\$1,257,936,500	0.16	\$7,359,134	\$11,775
2023	Total	\$2,050,000	\$1,257,936,500	0.16	\$7,359,134	\$11,775

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 7 – Preparer/Contact Information	
Preparer name Michelle Ebbert	Preparer title Clerk/Treasurer
Preparer email mebbert@fortatkinsonwi.gov	Preparer phone (920) 397-9901
Contact name Rebecca Houseman	Contact title City Manager
Contact email rhouseman@fortatkinsonwi.gov	Contact phone (920) 397-9901

Submission Information	
Co-muni code	28226
TID number	008
Submission date	03-24-2025 02:58 PM
Confirmation	TIDAR20240780O1741879940758
Submission type	ORIGINAL

Current Status

City of Fort Atkinson
Tax Increment District No. 8
Cash Flow Proforma Analysis

Assumptions	
Annual Inflation During Life of TID.....	0.00%
2024 Gross Tax Rate (per \$1000 Equalized Value)...	\$19.38
Annual Adjustment to tax rate.....	0.00%
Investment rate.....	0.50%
Data above dashed line are actual	

Background Data					Revenues				DONOR Expenditures							TID Status					
		(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	(m)	(n)	(o)	(p)	(q)	(r)		
Year	TIF District Valuation		Construction Increment	TIF Increment Over Base	Tax Rate	Tax Revenue	Intergovernmental Revenues	Investment Proceeds	Total Revenues	Existing Debt Service	Garrison Holdings Reimbursent to Developer	Affordable Housing Fund	Capital Outlay	Transfers to Recipient TID 6	Admin. Costs	Combined Expenditures	Annual Balance	Year End Cumulative Balance	Cost Recovery	Year	
	(January 1)										(1)	(2)					(December 31)				
	Base Value																				
	\$28,584,200																				
2024	\$84,729,700			\$56,145,500	\$19.38	\$970,153	\$6,127	\$65,302	\$1,041,582	\$960,804	\$48,110	\$0	\$40,542	\$1,283,476	\$14,979	\$2,347,911	(\$1,306,329)	\$0	Per 2024 Audit	2024	
2025	\$84,729,700			\$56,145,500	\$19.38	\$1,088,100		\$0	\$1,088,100			\$1,088,100				\$1,088,100	(\$0)	\$0	Expenditures Recovered	2025	
				\$24,536,800		\$10,763,051	\$6,127	\$219,169	\$10,988,347	\$960,804	\$48,110	\$1,088,100	\$40,542	\$1,283,476	\$14,979	\$3,436,011					

Type of TID: Mixed Use
2009 TID Inception (9/15/2009)
2024 Final Year to Incur TIF Related Costs
2025 TID Closure/Affordable Housing Extension

(1) Increment per City Estimates. Garrison Holdings, LLC
(2) Affordable Housing Extension Approval
Assumes debt payoff in 2024 or held in account and finalized on 2/1/2026.

RESOLUTION NO. 2024-1422

A RESOLUTION EXTENDING THE LIFE OF TAX INCREMENTAL DISTRICT NO. 8 (TID NO. 8) FOR ONE YEAR TO FUND AFFORDABLE HOUSING PROGRAMS AND PROJECTS WITHIN THE CITY OF FORT ATKINSON, WISCONSIN

WHEREAS, the City of Fort Atkinson created TID # 8 on September 15, 2009, and successfully completed implementation of certain elements of the project plan; and

WHEREAS, sufficient increment was collected or will be collected from the 2024 tax roll to pay off its aggregate project costs and other obligations; and

WHEREAS, state law requires termination of a TID after all project costs have been paid, state law (sec. 66.1105(6)(g), Wis. Stats.), does allow extension of a TID up to one year, using the last year of tax increment to improve the City's housing stock; and

WHEREAS, at least 75 percent of the final increment must benefit affordable housing with the remaining portion used to improve housing stock.

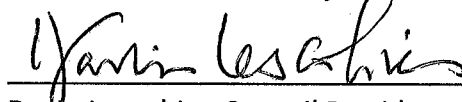
NOW, THEREFORE, BE IT RESOLVED, that the City of Fort Atkinson, Wisconsin, hereby extends the life of TID # 8 for up to 12 months to use the final year's increment collected in 2025 from the 2024 tax roll to benefit affordable housing; and

BE IT FURTHER RESOLVED, that the City of Fort Atkinson shall use the final increment to improve housing quality and affordability by developing and implementing a program with one or more of the following elements: down payment assistance, construction incentives, investment in public infrastructure, and/or home improvement grants; and

BE IT FURTHER RESOLVED, that the City of Fort Atkinson shall notify the Wisconsin Department of Revenue by providing a copy of this resolution.

Adopted this 20th day of August, 2024.

City of Fort Atkinson City Council



Dawn Lescohier, Council President

ATTEST:



Michelle Ebbert, Clerk/Treasurer/Finance Director

RESOLUTION NO. 1435

**TAX INCREMENTAL DISTRICT (TID) TERMINATION RESOLUTION
TERMINATING TID #8 IN THE CITY OF FORT ATKINSON, JEFFERSON COUNTY, WISCONSIN**

WHEREAS, the City Council of the City of Fort Atkinson created TID #8 on September 15, 2009, and adopted a project plan in the same year; and

WHEREAS, the City Council adopted Resolution No. 2024-1422 on August 20, 2024, which extended the life of TID #8 for 12 months, using the increment collected in 2025 from the 2024 tax roll to improve the City's housing stock (Affordable Housing Fund); and

WHEREAS, all TID #8 projected were completed in the prescribed allowed time; and

WHEREAS, sufficient increment was collected as of the 2023 tax roll, payable in 2024, to cover TID project costs.

NOW, THEREFORE, BE IT RESOLVED, that the City Council of the City of Fort Atkinson hereby terminates TID #8; and

BE IT FURTHER RESOLVED, that the City Clerk shall notify the Wisconsin Department of Revenue (DOR), within sixty (60) days of this resolution or prior to the deadline of April 15, 2025, whichever comes first, that the TID has been terminated; and

BE IT FURTHER RESOLVED, that the City Clerk shall sign the required DOR Final Accounting Submission Date form (PE-223) agreeing on a date by which the City shall submit the final accounting information to DOR; and

BE IT FURTHER RESOLVED, that the City Treasurer shall distribute any excess increment collected after providing for ongoing expenses of the TID, to the affected taxing jurisdictions with proportionate shares as determined by the final audit by the City's auditor, Baker Tilly, LLP.

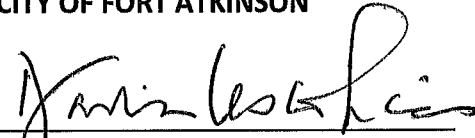
Adopted and this 3rd day of April 2025.

Resolution introduced and adoption moved by Council Member Becker.

Motion for adoption seconded by Council Member Jaekel.

On roll call motion, passed by a vote of 5 ayes to 0 nays.

CITY OF FORT ATKINSON


Davin Leschier, Council President

ATTEST:

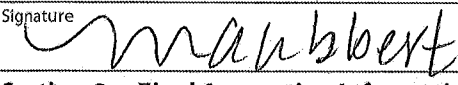

Michelle Ebbert, City Clerk/Treasurer/Finance Director

Under state law, (sec. 66.1105(8)(c), Wis. Stats.), the municipality terminating a TID and the Wisconsin Department of Revenue (DOR) must agree on a final accounting submission date. The "Final accounting submission date" you enter on this form is the date the TID Final Accounting Report (Form PE-110) will be due.

Instructions

1. Within 60 days of adopting a termination resolution or by April 15, whichever comes first, email tif@wisconsin.gov:
 - Completed Form PE-223 (Section 1)
 - Municipality's adopted termination resolution
2. When we receive your information, a DOR representative will approve, sign and email this form back to you
3. After you receive the signed Form PE-223 from us, complete the steps in Section 2 by the final accounting submission date
4. If you cannot e-file the TID Final Accounting Report (Form PE-110) by the final accounting submission date, email tif@wisconsin.gov to request a revised submission date. This date must be within 12 months of the termination resolution (sec. 66.1105(6m)(b)(3), Wis. Stats.).

Questions? Contact us at tif@wisconsin.gov

Section 1: Termination Information			
Municipal and TID Information			
Taxation district (check one) ☐ Town ☐ Village ☒ City Enter municipality → Fort Atkinson	County Jefferson	Co-muni code 28 - 226	TID number 8
Important Dates			
Termination resolution date 04 - 03 - 2025	Date notified DOR of termination 04 - 07 - 2025		
Date notified real property lister (to remove TID number from the tax/assessment roll) 04 - 07 - 2025	Final accounting submission date (6-12 months from termination resolution date) 04 - 03 - 2026		
Clerk Information			
Name Michelle Ebbert	Phone (920) 397 - 9901		
Signature 	Email mebbert@fortatkinsonwi.gov		
Section 2: Final Accounting Information			
Final accounting submission date: 4 - 3 - 2026			
Complete the following: 1. Complete the TID Final Audit. Save a copy in the municipal TID records. 2. E-file the <u>TID Final Accounting Report (PE-110)</u>			
Important – if your municipality does not e-file Form PE-110 with DOR by the final accounting submission date (or revised submission date), DOR will not certify or redetermine any future TIDs (sec. 66.1105(8)(d), Wis. Stats.).			

DOR Approval (for department use only)	
☐ Final accounting submission date approved	DOR name/signature

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Section 1 – Municipality and TID					
Co-muni code 28226	Municipality FORT ATKINSON		County JEFFERSON	Due date 07/01/2025	Report type ORIGINAL
TID number 009	TID type 6	TID name NORTHWEST MIXED USE	Creation date 10/18/2022	Mandatory termination date 10/18/2043	Anticipated termination date N/A

Section 2 – Beginning Balance	Amount
TID fund balance at beginning of year	\$-17,750

Section 3 – Revenue	Amount
Tax increment	\$0
Investment income	
Debt proceeds	\$3,500,000
Special assessments	
Shared revenue	
Sale of property	
Allocation from another TID	
Developer guarantees	
Transfer from other funds	
Grants	
Other revenue	
Source PREMIUM ON DEBT	\$76,790
Total Revenue (deposits)	\$3,576,790

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 4 – Expenditures	Amount
Capital expenditures	
Administration	\$8,027
Professional services	
Interest and fiscal charges	
DOR fees	\$150
Discount on long-term debt	
Debt issuance costs	\$112,717
Principal on long-term debt	
Environmental costs	
Real property assembly costs	
Allocation to another TID	
Developer grants	
Developer name N/A	\$0
Transfer to other funds	
Other expenditures	
Name BANKER ROAD DESIGN	\$139,864
Total Expenditures	\$260,758

Section 5 – Ending Balance	Amount
TID fund balance at end of year	\$3,298,282
Future costs	\$0
Future revenue	
Surplus or deficit	\$3,298,282

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 6 – TID New Construction

Current Year TID New Construction Values				
TID	TID New Construction Increase	TID New Construction Decrease	Prior Year Correction	TID Net New Construction (NNC)
006	\$0	\$0	\$0	\$0
007	\$73,600	\$0	\$0	\$73,600
008	\$1,695,100	\$0	\$-238,400	\$1,456,700
009	\$0	\$0	\$0	\$0
010	\$1,316,000	\$0	\$0	\$1,316,000
Total	\$3,084,700	\$0	\$-238,400	\$2,846,300

Current Year Allowable Levy Increase Attributable to TID NNC					
TID	TID Net New Construction	Prior Year Municipal Equalized Value	TID Net New Construction %	Prior Year Adjusted Actual Levy	Allowable Levy Increase Attributable to TID Net New Construction
006	\$0	\$1,352,486,400	0.00	\$7,399,314	\$0
007	\$73,600	\$1,352,486,400	0.01	\$7,399,314	\$740
008	\$1,456,700	\$1,352,486,400	0.11	\$7,399,314	\$8,139
009	\$0	\$1,352,486,400	0.00	\$7,399,314	\$0
010	\$1,316,000	\$1,352,486,400	0.10	\$7,399,314	\$7,399
Total	\$2,846,300	\$1,352,486,400	0.22	\$7,399,314	\$16,278

Current Year Actual TID NNC Impact to Municipal Levy	
Levy Increase Attributable to TID Net New Construction	Increase per \$100,000
\$11,775	\$0.11775

Historical Allowable Levy Increase Attributable to TID NNC						
Year	TID	TID Net New Construction	Prior Year Municipal Equalized Value	TID Net New Construction %	Prior Year Adjusted Actual Levy	Allowable Levy Increase Attributable to TID Net New Construction
2023	006	\$0	\$1,257,936,500	0.00	\$7,359,134	\$0
2023	007	\$0	\$1,257,936,500	0.00	\$7,359,134	\$0
2023	008	\$2,050,000	\$1,257,936,500	0.16	\$7,359,134	\$11,775
2023	Total	\$2,050,000	\$1,257,936,500	0.16	\$7,359,134	\$11,775

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 7 – Preparer/Contact Information	
Preparer name Michelle Ebbert	Preparer title Clerk/Treasurer
Preparer email mebbert@fortatkinsonwi.gov	Preparer phone (920) 397-9901
Contact name Rebecca Houseman	Contact title City Manager
Contact email rhouseman@fortatkinsonwi.gov	Contact phone (920) 397-9901

Submission Information	
Co-muni code	28226
TID number	009
Submission date	03-24-2025 02:58 PM
Confirmation	TIDAR20240780O1741881314810
Submission type	ORIGINAL

Current Status JRB

City of Fort Atkinson

Tax Increment District No. 9

Current Status 1% Inflation Model

Assumptions	
Annual Inflation During Life of TID.....	1.00%
2024 Gross Tax Rate (per \$1000 Equalized Value).....	\$19.38
Annual Adjustment to tax rate.....	0.00%
Investment rate.....	0.00%
Data above dashed line are actual	

Year	Background Data					Revenues		Expenditures		TID Status			Year
	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	
	TIF District	Inflation	Construction	TIF Increment	Tax	Tax	Total	Admin	Combined	Annual	Year End		
	Valuation	Increment	Increment	Over Base	Rate	Revenue	Revenues	Expenses	Expenditures	Balance	Cumulative	Cost Recovery	
	(January 1)										(December 31)		
	Base Value												
	\$23,689,600												
2024	\$24,822,800	\$248,228		\$1,381,428	\$19.38	\$0	\$0		\$0	\$0	(\$17,751)	Per 2024 Audit	2024
2025	\$25,071,028	\$250,710		\$1,632,138	\$19.38	\$21,961	\$21,961	\$15,000	\$15,000	\$6,961	(\$10,790)		2025
2026	\$25,321,738	\$253,217		\$1,885,356	\$19.38	\$26,772	\$26,772	\$15,000	\$15,000	\$11,772	\$982	Expenditures Recovered	2026
2027	\$25,574,956	\$255,750		\$2,141,105	\$19.38	\$31,631	\$31,631	\$15,000	\$15,000	\$16,631	\$17,613	Expenditures Recovered	2027
2028	\$25,830,705	\$258,307		\$2,399,412	\$19.38	\$36,538	\$36,538	\$15,000	\$15,000	\$21,538	\$39,152	Expenditures Recovered	2028
2029	\$26,089,012	\$260,890		\$2,660,302	\$19.38	\$41,495	\$41,495	\$15,000	\$15,000	\$26,495	\$65,646	Expenditures Recovered	2029
2030	\$26,349,902	\$263,499		\$2,923,801	\$19.38	\$46,501	\$46,501	\$15,000	\$15,000	\$31,501	\$97,147	Expenditures Recovered	2030
2031	\$26,613,401	\$266,134		\$3,189,935	\$19.38	\$51,557	\$51,557	\$15,000	\$15,000	\$36,557	\$133,703	Expenditures Recovered	2031
2032	\$26,879,535	\$268,795		\$3,458,731	\$19.38	\$56,663	\$56,663	\$15,000	\$15,000	\$41,663	\$175,367	Expenditures Recovered	2032
2033	\$27,148,331	\$271,483		\$3,730,214	\$19.38	\$61,821	\$61,821	\$15,000	\$15,000	\$46,821	\$222,188	Expenditures Recovered	2033
2034	\$27,419,814	\$274,198		\$4,004,412	\$19.38	\$67,030	\$67,030	\$15,000	\$15,000	\$52,030	\$274,218	Expenditures Recovered	2034
2035	\$27,694,012	\$276,940		\$4,281,352	\$19.38	\$72,292	\$72,292	\$15,000	\$15,000	\$57,292	\$331,509	Expenditures Recovered	2035
2036	\$27,970,952	\$279,710		\$4,561,062	\$19.38	\$77,606	\$77,606	\$15,000	\$15,000	\$62,606	\$394,115	Expenditures Recovered	2036
2037	\$28,250,662	\$282,507		\$4,843,569	\$19.38	\$82,973	\$82,973	\$15,000	\$15,000	\$67,973	\$462,088	Expenditures Recovered	2037
2038	\$28,533,169	\$285,332		\$5,128,900	\$19.38	\$88,393	\$88,393	\$15,000	\$15,000	\$73,393	\$535,481	Expenditures Recovered	2038
2039	\$28,818,500	\$288,185		\$5,417,085	\$19.38	\$93,868	\$93,868	\$15,000	\$15,000	\$78,868	\$614,349	Expenditures Recovered	2039
2040	\$29,106,685	\$291,067		\$5,708,152	\$19.38	\$99,398	\$99,398	\$15,000	\$15,000	\$84,398	\$698,747	Expenditures Recovered	2040
2041	\$29,397,752	\$293,978		\$6,002,130	\$19.38	\$104,983	\$104,983	\$15,000	\$15,000	\$89,983	\$788,730	Expenditures Recovered	2041
2042	\$29,691,730	\$296,917		\$6,299,047	\$19.38	\$110,624	\$110,624	\$15,000	\$15,000	\$95,624	\$884,354	Expenditures Recovered	2042
2043					\$19.38	\$116,321	\$116,321		\$0	\$116,321	\$1,000,676	Expenditures Recovered	2043
2044						\$122,076	\$122,076		\$0	\$122,076	\$1,122,751	Expenditures Recovered	2044
		\$5,165,847	\$1,133,200			\$1,410,502	\$1,410,502	\$270,000	\$270,000				

Type of TID: Mixed-Use

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

Current Status 1.5% Inflation

City of Fort Atkinson
Tax Increment District No. 9
Current Status 1.5% Inflation Model

Assumptions	
Annual Inflation During Life of TID.....	1.50%
2024 Gross Tax Rate (per \$1000 Equalized Value).....	\$19.38
Annual Adjustment to tax rate.....	0.00%
Investment rate.....	0.00%
Data above dashed line are actual	

Year	Background Data					Revenues					Expenditures							TID Status			Year
	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	(m)	(n)	(o)	(p)	(q)	(r)	(s)	(t)	
	TIF District Valuation	Inflation Increment	Construction Increment	TIF Increment Over Base	Tax Rate	Tax Revenue	Advance Wastewater Utility	Advance from General Fund	Owner Occupied Lots	Total Revenues	Future Debt Service	Ridge View Loft Apartment Incentive	Admin Expenses	Future Infrastructure Costs	Transfers to General Fund	Transfers to Wastewater	Combined Expenditures	Annual Balance	Year End Cumulative Balance	Cost Recovery	
	(January 1)																	(December 31)			
	(1)																				
	Base Value																				
	\$23,689,600																				
2024	\$24,822,800	\$372,342	\$0	\$1,505,542	\$19.38	\$0				\$0							\$0	\$0	(\$17,751)	Per 2024 Audit	
2025	\$25,195,142	\$377,927	\$7,000,000	\$8,883,469	\$19.38	\$21,961	\$1,000,000	\$625,000	\$1,188,000	\$1,646,961			\$15,000	\$1,625,000			\$1,640,000	\$6,961	(\$10,790)		
2026	\$32,573,069	\$488,596	\$7,000,000	\$16,372,065	\$19.38	\$29,177				\$1,217,177			\$15,000				\$15,000	\$1,202,177	\$1,191,388		
2027	\$40,061,665	\$600,925	\$2,500,000	\$19,472,990	\$19.38	\$172,162				\$1,217,162	\$166,250	\$122,094	\$15,000				\$303,344	(\$131,182)	\$1,060,205		
2028	\$43,162,590	\$647,439	\$2,500,000	\$22,620,429	\$19.38	\$317,291				\$1,217,291	\$166,250	\$244,188	\$15,000				\$425,438	(\$108,147)	\$952,058		
2029	\$46,310,029	\$694,650	\$2,500,000	\$25,815,079	\$19.38	\$377,387				\$1,217,387	\$166,250	\$244,188	\$15,000				\$425,438	(\$48,051)	\$904,007		
2030	\$49,504,679	\$742,570	\$2,500,000	\$29,057,650	\$19.38	\$438,384				\$1,217,384	\$166,250	\$244,188	\$15,000		\$125,000		\$550,438	(\$112,054)	\$791,953		
2031	\$52,747,250	\$791,209		\$29,848,858	\$19.38	\$500,296				\$1,217,296	\$166,250	\$244,188	\$15,000		\$125,000		\$550,438	(\$50,142)	\$741,811		
2032	\$53,538,458	\$803,077		\$30,651,935	\$19.38	\$563,137				\$1,217,137	\$166,250	\$244,188	\$15,000		\$125,000		\$550,438	\$12,699	\$754,510		
2033	\$54,341,535	\$815,123		\$31,467,058	\$19.38	\$578,471				\$1,217,471	\$166,250	\$217,056	\$15,000		\$125,000		\$523,306	\$55,165	\$809,675		
2034	\$55,156,658	\$827,350		\$32,294,408	\$19.38	\$594,035				\$1,217,035	\$210,181	\$217,056	\$15,000		\$125,000		\$567,237	\$26,797	\$836,472		
2035	\$55,984,008	\$839,760		\$33,134,168	\$19.38	\$609,832				\$1,217,382	\$276,381	\$217,056	\$15,000				\$508,437	\$101,394	\$937,866		
2036	\$56,823,768	\$852,357		\$33,986,525	\$19.38	\$625,866				\$1,217,316	\$319,731	\$217,056	\$15,000				\$551,787	\$74,078	\$1,011,945		
2037	\$57,676,125	\$865,142		\$34,851,667	\$19.38	\$642,140				\$1,217,140	\$360,706	\$217,056	\$15,000				\$592,762	\$49,378	\$1,061,323		
2038	\$58,541,267	\$878,119		\$35,729,786	\$19.38	\$658,659				\$1,217,659	\$404,188	\$189,924	\$15,000				\$609,112	\$49,547	\$1,110,870		
2039	\$59,419,386	\$891,291		\$36,621,076	\$19.38	\$675,425				\$1,217,425	\$469,463	\$189,924	\$15,000				\$674,387	\$1,039	\$1,111,909		
2040	\$60,310,676	\$904,660		\$37,525,737	\$19.38	\$692,443				\$1,217,443	\$535,819	\$189,924	\$15,000				\$740,743	(\$48,300)	\$1,063,609		
2041	\$61,215,337	\$918,230		\$38,443,967	\$19.38	\$709,716				\$1,217,716	\$598,138		\$15,000			\$250,000	\$1,053,062	(\$343,345)	\$720,264		
2042	\$62,133,567	\$932,003		\$39,375,970	\$19.38	\$727,249				\$1,217,249	\$666,181					\$250,000	\$931,181	(\$203,932)	\$516,332		
2043						\$745,044				\$1,217,044	\$788,288					\$250,000	\$1,038,288	(\$293,243)	\$223,088		
2044						\$763,106				\$1,217,106						\$250,000	\$250,000	\$513,106	\$736,195	Expenditures Recovered	

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

(1) Increment per City Estimates.
(2) Hypothetical 90% PAYGO Payment 27-32, 80% 33-37, 70% 38-41
(3) Per City Estimate

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 1 – Municipality and TID					
Co-muni code 28226	Municipality FORT ATKINSON		County JEFFERSON	Due date 07/01/2025	Report type ORIGINAL
TID number 010	TID type 2	TID name NORTHEAST BLIGHT ELIM	Creation date 10/18/2022	Mandatory termination date 10/18/2050	Anticipated termination date N/A

Section 2 – Beginning Balance	Amount
TID fund balance at beginning of year	\$-17,308

Section 3 – Revenue	Amount
Tax increment	\$0
Investment income	
Debt proceeds	
Special assessments	
Shared revenue	
Sale of property	
Allocation from another TID	
Developer guarantees	
Transfer from other funds	
Grants	
Other revenue	
Total Revenue (deposits)	\$0

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 4 – Expenditures	Amount
Capital expenditures	\$8,028
Administration	
Professional services	
Interest and fiscal charges	
DOR fees	\$150
Discount on long-term debt	
Debt issuance costs	
Principal on long-term debt	
Environmental costs	
Real property assembly costs	
Allocation to another TID	
Developer grants	
Developer name N/A	\$0
Transfer to other funds	
Other expenditures	
Total Expenditures	\$8,178

Section 5 – Ending Balance	Amount
TID fund balance at end of year	\$-25,486
Future costs	\$0
Future revenue	
Surplus or deficit	\$-25,486

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 6 – TID New Construction

Current Year TID New Construction Values				
TID	TID New Construction Increase	TID New Construction Decrease	Prior Year Correction	TID Net New Construction (NNC)
006	\$0	\$0	\$0	\$0
007	\$73,600	\$0	\$0	\$73,600
008	\$1,695,100	\$0	\$-238,400	\$1,456,700
009	\$0	\$0	\$0	\$0
010	\$1,316,000	\$0	\$0	\$1,316,000
Total	\$3,084,700	\$0	\$-238,400	\$2,846,300

Current Year Allowable Levy Increase Attributable to TID NNC					
TID	TID Net New Construction	Prior Year Municipal Equalized Value	TID Net New Construction %	Prior Year Adjusted Actual Levy	Allowable Levy Increase Attributable to TID Net New Construction
006	\$0	\$1,352,486,400	0.00	\$7,399,314	\$0
007	\$73,600	\$1,352,486,400	0.01	\$7,399,314	\$740
008	\$1,456,700	\$1,352,486,400	0.11	\$7,399,314	\$8,139
009	\$0	\$1,352,486,400	0.00	\$7,399,314	\$0
010	\$1,316,000	\$1,352,486,400	0.10	\$7,399,314	\$7,399
Total	\$2,846,300	\$1,352,486,400	0.22	\$7,399,314	\$16,278

Current Year Actual TID NNC Impact to Municipal Levy	
Levy Increase Attributable to TID Net New Construction	Increase per \$100,000
\$11,775	\$0.11775

Historical Allowable Levy Increase Attributable to TID NNC						
Year	TID	TID Net New Construction	Prior Year Municipal Equalized Value	TID Net New Construction %	Prior Year Adjusted Actual Levy	Allowable Levy Increase Attributable to TID Net New Construction
2023	006	\$0	\$1,257,936,500	0.00	\$7,359,134	\$0
2023	007	\$0	\$1,257,936,500	0.00	\$7,359,134	\$0
2023	008	\$2,050,000	\$1,257,936,500	0.16	\$7,359,134	\$11,775
2023	Total	\$2,050,000	\$1,257,936,500	0.16	\$7,359,134	\$11,775

Form PE-300	TID Annual Report	2024 WI Dept of Revenue
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Section 7 – Preparer/Contact Information	
Preparer name Michelle Ebbert	Preparer title Clerk/Treasurer
Preparer email mebbert@fortatkinsonwi.gov	Preparer phone (920) 397-9901
Contact name Rebecca Houseman	Contact title City Manager
Contact email rhouseman@fortatkinsonwi.gov	Contact phone (920) 397-9901

Submission Information	
Co-muni code	28226
TID number	010
Submission date	03-24-2025 02:58 PM
Confirmation	TIDAR20240780O1741881854583
Submission type	ORIGINAL

Current Status

City of Fort Atkinson Tax Increment District No. 10 Sample Cash Flow Proforma Analysis

Assumptions	
Annual Inflation During Life of TID.....	1.00%
2024 Gross Tax Rate (per \$1000 Equalized Value).....	\$19.38
Annual Adjustment to tax rate.....	0.00%
Investment rate.....	0.00%
Data above dashed line are actual	

Background Data					Revenues		Expenditures		TID Status			Year
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	
TIF District Valuation	Inflation Increment	Construction Increment	TIF Increment Over Base	Tax Rate	Tax Revenue	Total Revenues	Admin Expenses	Combined Expenditures	Annual Balance	Year End Cumulative Balance	Cost Recovery	
(January 1)									(December 31)			
(1)												
Base Value												
\$23,751,700												
2024	\$25,729,900	\$257,299	\$2,235,499	\$19.38	\$0	\$0	\$8,178	\$8,178	(\$8,178)	(\$25,486)	Per 2024 Audit	2024
2025	\$25,987,199	\$259,872	\$2,495,371	\$19.38	\$38,338	\$38,338	\$15,000	\$15,000	\$23,338	(\$2,148)	Expenditures Recovered	2025
2026	\$26,247,071	\$262,471	\$2,757,842	\$19.38	\$43,324	\$43,324	\$15,000	\$15,000	\$28,324	\$26,175	Expenditures Recovered	2026
2027	\$26,509,542	\$265,095	\$3,022,937	\$19.38	\$48,360	\$48,360	\$15,000	\$15,000	\$33,360	\$59,536	Expenditures Recovered	2027
2028	\$26,774,637	\$267,746	\$3,290,683	\$19.38	\$53,447	\$53,447	\$15,000	\$15,000	\$38,447	\$97,983	Expenditures Recovered	2028
2029	\$27,042,383	\$270,424	\$3,561,107	\$19.38	\$58,585	\$58,585	\$15,000	\$15,000	\$43,585	\$141,567	Expenditures Recovered	2029
2030	\$27,312,807	\$273,128	\$3,834,235	\$19.38	\$63,773	\$63,773	\$15,000	\$15,000	\$48,773	\$190,341	Expenditures Recovered	2030
2031	\$27,585,935	\$275,859	\$4,110,095	\$19.38	\$69,014	\$69,014	\$15,000	\$15,000	\$54,014	\$244,355	Expenditures Recovered	2031
2032	\$27,861,795	\$278,618	\$4,388,713	\$19.38	\$74,307	\$74,307	\$15,000	\$15,000	\$59,307	\$303,662	Expenditures Recovered	2032
2033	\$28,140,413	\$281,404	\$4,670,117	\$19.38	\$79,654	\$79,654	\$15,000	\$15,000	\$64,654	\$368,316	Expenditures Recovered	2033
2034	\$28,421,817	\$284,218	\$4,954,335	\$19.38	\$85,053	\$85,053	\$15,000	\$15,000	\$70,053	\$438,369	Expenditures Recovered	2034
2035	\$28,706,035	\$287,060	\$5,241,395	\$19.38	\$90,507	\$90,507	\$15,000	\$15,000	\$75,507	\$513,876	Expenditures Recovered	2035
2036	\$28,993,095	\$289,931	\$5,531,326	\$19.38	\$96,015	\$96,015	\$15,000	\$15,000	\$81,015	\$594,891	Expenditures Recovered	2036
2037	\$29,283,026	\$292,830	\$5,824,157	\$19.38	\$101,578	\$101,578	\$15,000	\$15,000	\$86,578	\$681,469	Expenditures Recovered	2037
2038	\$29,575,857	\$295,759	\$6,119,915	\$19.38	\$107,197	\$107,197	\$15,000	\$15,000	\$92,197	\$773,667	Expenditures Recovered	2038
2039	\$29,871,615	\$298,716	\$6,418,631	\$19.38	\$112,872	\$112,872	\$15,000	\$15,000	\$97,872	\$871,539	Expenditures Recovered	2039
2040	\$30,170,331	\$301,703	\$6,720,335	\$19.38	\$118,604	\$118,604	\$15,000	\$15,000	\$103,604	\$975,143	Expenditures Recovered	2040
2041	\$30,472,035	\$304,720	\$7,025,055	\$19.38	\$124,393	\$124,393	\$15,000	\$15,000	\$109,393	\$1,084,536	Expenditures Recovered	2041
2042	\$30,776,755	\$307,768	\$7,332,822	\$19.38	\$130,240	\$130,240	\$15,000	\$15,000	\$115,240	\$1,199,776	Expenditures Recovered	2042
2043	\$31,084,522	\$310,845	\$7,643,668	\$19.38	\$136,146	\$136,146	\$15,000	\$15,000	\$121,146	\$1,320,921	Expenditures Recovered	2043
2044	\$31,395,368	\$313,954	\$7,957,621	\$19.38	\$142,110	\$142,110	\$15,000	\$15,000	\$127,110	\$1,448,031	Expenditures Recovered	2044
2045	\$31,709,321	\$317,093	\$8,274,715	\$19.38	\$148,134	\$148,134	\$15,000	\$15,000	\$133,134	\$1,581,166	Expenditures Recovered	2045
2046	\$32,026,415	\$320,264	\$8,594,979	\$19.38	\$154,219	\$154,219	\$15,000	\$15,000	\$139,219	\$1,720,384	Expenditures Recovered	2046
2047	\$32,346,679	\$323,467	\$8,918,446	\$19.38	\$160,364	\$160,364	\$15,000	\$15,000	\$145,364	\$1,865,748	Expenditures Recovered	2047
2048	\$32,670,146	\$326,701	\$9,245,147	\$19.38	\$166,571	\$166,571	\$15,000	\$15,000	\$151,571	\$2,017,319	Expenditures Recovered	2048
2049	\$32,996,847		\$9,245,147	\$19.38	\$172,839	\$172,839	\$15,000	\$15,000	\$157,839	\$2,175,159	Expenditures Recovered	2049
2050					\$179,171	\$179,171		\$0	\$179,171	\$2,354,330	Expenditures Recovered	2050
2051					\$179,171	\$179,171		\$0	\$179,171	\$2,533,501	Expenditures Recovered	2051
\$7,266,947					\$2,933,987		\$383,178		\$383,178			
\$1,978,200					\$2,933,987		\$383,178		\$383,178			

Type of TID: Blight

2023 TID Inception (10/18/2022)

2045 Final Year to Incur TIF Related Costs

2050 Maximum Legal Life of TID (27 Years)

2051 Final Tax Collection Year

(1) Increment per City Estimates.

Current Status

City of Fort Atkinson Tax Increment District No. 10 Sample Cash Flow Proforma Analysis

Assumptions	
Annual Inflation During Life of TID.....	1.00%
2024 Gross Tax Rate (per \$1000 Equalized Value).....	\$19.38
Annual Adjustment to tax rate.....	0.00%
Investment rate.....	0.00%
Data above dashed line are actual	

Background Data					Revenues		Expenditures				TID Status			Year
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	(m)	(n)	
TIF District Valuation	Inflation Increment	Construction Increment	TIF Increment Over Base	Tax Rate	Tax Revenue	Total Revenues	Hypothetical Future Debt Service	Fort Healthcare Incentive	Admin Expenses	Combined Expenditures	Annual Balance	Year End Cumulative Balance	Cost Recovery	
(January 1)											(December 31)			
Base Value														
\$23,751,700														
2024	\$25,729,900	\$257,299	\$2,235,499	\$19.38	\$0	\$0		\$0	\$8,178	\$8,178	(\$8,178)	(\$25,486)	Per 2024 Audit	2024
2025	\$25,987,199	\$259,872	\$6,032,521	\$19.38	\$38,338	\$38,338	\$0	\$0	\$15,000	\$15,000	\$23,338	(\$2,148)		2025
2026	\$29,784,221	\$297,842	\$9,228,363	\$19.38	\$43,324	\$43,324	\$31,900	\$0	\$15,000	\$46,900	(\$3,576)	(\$5,725)		2026
2027	\$32,980,063	\$329,801	\$9,558,164	\$19.38	\$116,910	\$116,910	\$63,800	\$8,671	\$15,000	\$87,471	\$29,440	\$23,715		2027
2028	\$33,309,864	\$333,099	\$9,891,262	\$19.38	\$178,846	\$178,846	\$31,900	\$8,757	\$15,000	\$55,657	\$123,188	\$146,903		2028
2029	\$33,642,962	\$336,430	\$10,227,692	\$19.38	\$185,237	\$185,237	\$104,688	\$8,845	\$15,000	\$128,532	\$56,705	\$203,608		2029
2030	\$33,979,392	\$339,794	\$10,567,486	\$19.38	\$191,693	\$191,693	\$105,175	\$8,933	\$15,000	\$129,108	\$62,584	\$266,192		2030
2031	\$34,319,186	\$343,192	\$10,910,678	\$19.38	\$198,213	\$198,213	\$102,975	\$9,023	\$15,000	\$126,998	\$71,215	\$337,407		2031
2032	\$34,662,378	\$346,624	\$11,257,302	\$19.38	\$204,798	\$204,798	\$100,775	\$9,113	\$15,000	\$124,888	\$79,910	\$417,317		2032
2033	\$35,009,002	\$350,090	\$11,607,392	\$19.38	\$211,449	\$211,449	\$103,438	\$9,204	\$15,000	\$127,642	\$83,807	\$501,124		2033
2034	\$35,359,092	\$353,591	\$11,960,983	\$19.38	\$218,167	\$218,167	\$105,825	\$9,296	\$15,000	\$130,121	\$88,045	\$589,170		2034
2035	\$35,712,683	\$357,127	\$12,318,109	\$19.38	\$224,951	\$224,951	\$103,075	\$9,389	\$15,000	\$127,464	\$97,487	\$686,657		2035
2036	\$36,069,809	\$360,698	\$12,678,808	\$19.38	\$231,804	\$231,804	\$100,325	\$9,483	\$15,000	\$124,808	\$106,996	\$793,653		2036
2037	\$36,430,508	\$364,305	\$13,043,113	\$19.38	\$238,725	\$238,725	\$102,438	\$9,578	\$15,000	\$127,015	\$111,710	\$905,362		2037
2038	\$36,794,813	\$367,948	\$13,411,061	\$19.38	\$245,715	\$245,715	\$99,413	\$9,674	\$15,000	\$124,086	\$121,629	\$1,026,991		2038
2039	\$37,162,761	\$371,628	\$13,782,688	\$19.38	\$252,776	\$252,776	\$101,250	\$9,770	\$15,000	\$126,020	\$126,755	\$1,153,747	Expenditures Recovered	2039
2040	\$37,534,388	\$375,344	\$14,158,032	\$19.38	\$259,906	\$259,906	\$102,813	\$9,868	\$15,000	\$127,681	\$132,226	\$1,285,972	Expenditures Recovered	2040
2041	\$37,909,732	\$379,097	\$14,537,130	\$19.38	\$267,108	\$267,108	\$104,100	\$9,967	\$15,000	\$129,067	\$138,042	\$1,424,014	Expenditures Recovered	2041
2042	\$38,288,830	\$382,888	\$14,920,018	\$19.38	\$274,383	\$274,383	\$100,250	\$10,066	\$15,000	\$125,316	\$149,066	\$1,573,080	Expenditures Recovered	2042
2043	\$38,671,718	\$386,717	\$15,306,735	\$19.38	\$281,730	\$281,730	\$101,263	\$10,167	\$15,000	\$126,430	\$155,300	\$1,728,380	Expenditures Recovered	2043
2044	\$39,058,435	\$390,584	\$15,697,319	\$19.38	\$289,150	\$289,150	\$102,000	\$10,269	\$15,000	\$127,269	\$161,881	\$1,890,261	Expenditures Recovered	2044
2045	\$39,449,019	\$394,490	\$16,091,810	\$19.38	\$296,645	\$296,645	\$102,463	\$10,371	\$15,000	\$127,834	\$168,811	\$2,059,072	Expenditures Recovered	2045
2046	\$39,843,510	\$398,435	\$16,490,245	\$19.38	\$304,214	\$304,214	\$97,788	\$10,475	\$15,000	\$123,263	\$180,951	\$2,240,023	Expenditures Recovered	2046
2047	\$40,241,945	\$402,419	\$16,892,664	\$19.38	\$311,859	\$311,859	\$97,975	\$10,580	\$15,000	\$123,555	\$188,304	\$2,428,328	Expenditures Recovered	2047
2048	\$40,644,364	\$406,444	\$17,299,108	\$19.38	\$319,581	\$319,581	\$102,750	\$10,686	\$15,000	\$128,436	\$191,145	\$2,619,473	Expenditures Recovered	2048
2049	\$41,050,808		\$17,299,108	\$19.38	\$327,380	\$327,380		\$10,793	\$15,000	\$25,793	\$301,587	\$2,921,060	Expenditures Recovered	2049
2050				\$19.38	\$335,257	\$335,257		\$10,900		\$10,900	\$324,356	\$3,245,416	Expenditures Recovered	2050
2051					\$335,257	\$335,257		\$0		\$0	\$335,257	\$3,580,673		2051
	\$8,885,758	\$8,413,350			\$6,383,413	\$6,383,413	\$2,168,375	\$233,879	\$383,178	\$2,785,432				

Type of TID: Blight

2023 TID Inception (10/18/2022)

2045 Final Year to Incur TIF Related Costs

2050 Maximum Legal Life of TID (27 Years)

2051 Final Tax Collection Year

(1) Increment per City Estimates.

City of Fort Atkinson

TID # 6-8 Affordable Housing Extension and Closure Timelines



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



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Erin Sweeney, Wastewater Utility Superintendent

RE: Review and possible action related to the purchase and installation of the on-site generators at the Sherman Avenue and Water Street Lift Stations
(Sweeney, Wastewater Superintendent)

BACKGROUND

The Sherman Avenue and Water Street Lift Stations were constructed in 1982. They are designed to pump wastewater from the downtown area to the Gravity Main Sewer.

DISCUSSION

Currently, during a power outage at the Sherman Avenue and Water Street Lift Stations, staff must manually transport pull-behind generators to the sites and connect them so that the lift stations continue to function properly. This process involves traveling to the plant, hooking up a generator, towing it to the lift station, and getting it operational. If both stations are affected, staff must repeat the process with a second generator. This procedure is not only time-consuming, but also poses logistical and safety challenges, especially when only one staff member is available or when severe weather makes travel hazardous. To improve efficiency and safety, staff proposes to permanently install 50kW Generac Generators with enclosures at each lift station. This solution would eliminate the need for manual transport, reduce response time during outages, and enhance the overall reliability of operations.

FINANCIAL ANALYSIS

This project was included in the 2025 Capital Improvements Projects budget at \$150,000. The planned project included the additional generators outlined above and the replacement of two pumps. The City Council approved the replacement of the Flygt submersible pumps at these lift stations at the meeting on June 3, 2025 at a cost of \$62,402, leaving \$87,598 for the generators portion of the project.

Staff received two proposals for the On-Site Generac Generators. They are as follows:

Home Backup Systems, LLC of Fort Atkinson, WI: \$74,059.20

Delta Electric of Whitewater, WI: \$98,945.00

After the pumps and the generators, there will be approximately \$11,657.20 remaining. Staff intends to use a portion of those funds to enhance the site around the Water Street Lift Station, including installing privacy fencing around the new generator and electrical panel to improve safety and appearance. Additionally, some overgrown trees will be removed to accommodate the installation of the generators. To restore and improve the appearance of the area, new landscaping will be added following the tree removal.

RECOMMENDATION

Staff recommends the council approve the purchase and installation of two onsite Generac Generators from Home Backup Systems, LLC of Fort Atkinson for a cost not to exceed \$74,059.20 to provide permanent back-up electricity for the Sherman Avenue and Water Street lift stations.

ATTACHMENTS

1. delta electric
2. Home Backup Systems, LLC

JOB PROPOSAL

Date: June 18, 2025

Customer:
City of Fort Atkinson
101 N Main St
Fort Atkinson, WI 53538

Ship To/Project:
Wastewater Department

Attn: Erin Sweeney 920-397-9917 (Esweeney@fortatkinsonwi.org)

Ref: Generators for Sherman & Water St

We propose to furnish all labor and material for complete electrical installation in accordance with all state and local codes. All work is to be completed in a workmanlike manner according to standard practices. Any alteration or deviation from the below or attached specifications will become an extra charge, over and above the proposal price. Delta Electric will not be held responsible for any strikes, accidents, acts of nature, or delays beyond our control. The proposal is based on standard wiring methods, non classified locations. Payment will be made within 14 days of the invoice date for labor and material to be completed and/or stored to date. Due to fluctuations in products costs, prices may change without notice.

BASE BID INCLUDES: Installing (2) generators, one at the Water Street lift station and one at the Sherman Ave lift station

- Furnish and install a mounting system to aid in future panel replacement
- Furnish and install all associated raceways and conductors
- Furnish and install grounding and bonding as required
- Furnish and install a concrete pad for the generator
- Furnish and install 2 Generators (see attached)
- Configure the new generators to run at 230-volt or greater to eliminate any buck boosting
- Electrical permit not included

Note: At the Water Street lift station, trees and roots to be removed prior to the installation by others
There are no obstructions at Sherman Ave station

Due to Volatility in the Market, Quotes are good for 48 hours after which pricing is subject to change and requote

Base Bid cost for above labor and materials.....\$98,945.00

Acceptance of Proposal

The above process, specifications and other contract terms are satisfactory and are hereby accepted. You are hereby authorized to do the work and provide the material and goods specified. Payment will be made as listed above.

Date Accepted: _____

Signature: _____

Title: _____

Phone: _____

Respectfully Submitted,
Delta Electric

By: RCR

Printed Name: Mr. Richard C Rozelle

Title: Project Manager / Estimator

We thank you for the opportunity to present the above bid estimate and hope you consider **Delta Electric** as a member of your team.

Respectfully,

Richard C. Rozelle
Project Manager/Estimator
Delta Electric
(262) 473-1019
rrozelle@deltaelectricwhitewater.com



Proposal Date	Proposal #	Prepared By	Terms
			Net 30 – Pending Approval

We would like to thank you for the opportunity to quote on your Generator Equipment requirements.
We are pleased to offer the following:

DESCRIPTION OF EQUIPMENT AND MATERIALS

Quantity 1 - Generac Industrial diesel engine-driven generator set with turbocharged 4-cylinder 3.3L engine, consisting of the following features and accessories:

- Stationary Emergency-Standby rated
- 35 kW Rating, wired for 120/208 VAC three phase, 60 Hz
- Permanent Magnet Excitation
- UL2200
- EPA Certified
- SCAQMD Certified
- Standard Weather Protective Enclosure, Steel
 - Industrial Grey Baked-On Powder Coat Finish
- Power Zone 410 Digital Control Panel for Single Generators
- 21 Light Annunciator with 8 Function Relay, Surface Mount
- Remote E-Stop - Surface
- Primary MLCB, 80% rated thermal-magnetic
 - 150 Amp
 - Alarm Contacts, Shunt Trip
- Battery Charger, 10 Amp, NFPA 110 compliant, installed
- 110 AH, 925 CCA Group 31 Battery, with rack, installed
- Block heater STD 1500W
- Air Filter restriction Indicator
- 120V GFCI and 240V Outlet
- Engine Run Relay
- Critical Muffler
- 24" 132 Gallon Double-Wall UL142 Basetank
 - Mechanical fuel level indicator gauge
 - Electronic fuel level sender
 - Emergency Vent
- Fuel Hose- Fire rated- SSteel
- Std set of 3 Manuals
- Standard 2-Year Limited Warranty

Quantity 1 - TX Series Automatic Transfer Switch consisting of the following features and accessories:



Material
Handling



Automation
& Robotics



Cranes
& Hoists



Engineered
Systems



Standby Power
& Generators



Workplace
Storage



Industrial
Storage & Handling



Railcar
Movers



- 150 Amp, 3 pole, 120/208 VAC three phase, 60 Hz, with 2 or 3-Wire Start Circuit
- 3 Owner's Manuals
- Double Set of Form C Aux Cont
- IBC Seismic Certified
- Any Breaker (3 Cycle)
- Withstand and Close-On Rating - 200kA Fuse Rating
- Withstand and Close-On Rating - 22kA Any Breaker
- Withstand and Close-On Rating - 42kA Specific Breaker
- Enclosure Heater
- IO Board - 4 Inputs, 4 Outputs
- CSA - C22.2 No.178
- UL Listed 1008 by ETL
- Controller Cover, Padlockable, Black
- NEMA 3R Enclosure
- Non Service Entrance Rated
- In Phase Only Transfer
- Standard two year basic warranty

Site Services

- *Freight to site (Offloading by others)*
- *Startup and Training Included*
- *Load Bank Test Included*

.. TOTAL EQUIPMENT AND ACCESSORIES ..

Project Description	Total Net Price
SD35 and ATS	

****Tariff Notice:** *The prices provided in this quote do not include any tariffs, duties or other government-imposed fees. If such costs apply, they will be billed in addition to the pricing shown and are not included in the quoted amount.* **

Prices Valid Until:7/1/25

Clarifications – Additional Notes:

1. Unless specifically listed in our Bill of Materials, equipment not indicated is assumed to be supplied by others.
2. Electrical & Mechanical Installation provided by others.
3. Gas Regulator provided by others. Examples of suitable brands for engine generator service: Sensus5, Emerson Fisher, Itron
4. Diesel Fuel provided by others.
5. Basic Startup & Testing performed during normal business hours (M-F / 7:00am-4:30pm)
6. No Seismic, Local IBC building codes or Unique Local Emissions regulations are included within the pricing.



Material Handling



Automation & Robotics



Cranes & Hoists



Engineered Systems



Standby Power & Generators



Workplace Storage



Industrial Storage & Handling



Railcar Movers



7. All pricing is Subject to change / base on any scope or BOM changes.
8. Generators subject to storage fees if not accepting delivery within 90 days of completion. \$100/month on mobile units. \$200/month on units <250kW. \$400/month on units $\geq$ 250kW.



Material
Handling



Automation
& Robotics



Cranes
& Hoists



Engineered
Systems



Standby Power
& Generators



Workplace
Storage



Industrial
Storage & Handling



Railcar
Movers

Home Backup Systems, LLC
 615 Madison Ave
 Fort Atkinson, WI 53538
 +18669818585
 homebackupsystem@gmail.com
 http://www.homebackupsystem.net



ADDRESS

Nick Armstrong
 City of Fort Atkinson Water
 Department
 101 N Main Street
 Fort Atkinson, WI 53538

Quote ESSTM107142025

DATE 07/14/2025

EXPIRATION DATE 09/30/2025

CONTACT

Tom McCulloch

DATE	ACTIVITY	QTY	RATE	AMOUNT
	Generator Installation:RD05033GDAE	1	37,029.60	37,029.60
	Model RD05033GDAE - Commercial Series: Brand - Protector Series Diesel; Kilowatts - 50kW; Voltage - 120/240 3ø; Fuel Type - Diesel; Enclosure - Aluminum Enclosure; RTSZ100J3 100amp non-SER, 120/240 3ø, with installation to include:			
	*Project coordination			
	*Site Prep			
	*Form and pour of concrete pad or pre-cast concrete pad			
	*Delivery and placement of unit			
	*Battery			
	*Cold weather and Extreme Cold kits with installation			
	*Electrical installation of transfer switch and generator			
	*Mobile Link monitor			
	*Unit activation and registration			
	*Initial start-up and full systems check			
	*Owner orientation on operation and maintenance of unit			
	****Cost of any required permits, not included			
	*Water Street Generator Installation			
	*Generator is out 6-12 weeks			
	*3/4 deposit required due to being a custom generator			

The above quote is guaranteed for 30 days. If this quote is accepted, please call our office at (920) 568-8882 and we can get your project!
 Thank you!

SUBTOTAL	37,029.60
TAX	0.00

TOTAL	\$37,029.60
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Home Backup Systems, LLC
 615 Madison Ave
 Fort Atkinson, WI 53538
 +18669818585
 homebackupsystem@gmail.com
 http://www.homebackupsystem.net



ADDRESS

Nick Armstrong
 City of Fort Atkinson Water
 Department
 101 N Main Street
 Fort Atkinson, WI 53538

Quote ESSTM107142026

DATE 07/14/2025

EXPIRATION DATE 08/08/2025

CONTACT

Tom McCulloch

DATE	ACTIVITY	QTY	RATE	AMOUNT
	Generator Installation:RD05033GDAE	1	37,029.60	37,029.60
	Model RD05033GDAE - Commercial Series: Brand - Protector Series Diesel; Kilowatts - 50kW; Voltage - 120/240 3ø; Fuel Type - Diesel; Enclosure - Aluminum Enclosure; RTSZ100J3 100amp non-SER, 120/240 3ø, with installation to include:			
	*Project coordination			
	*Site Prep			
	*Form and pour of concrete pad or pre-cast concrete pad			
	*Delivery and placement of unit			
	*Battery			
	*Cold weather and Extreme Cold kits with installation			
	*Electrical installation of transfer switch and generator			
	*Mobile Link monitor			
	*Unit activation and registration			
	*Initial start-up and full systems check			
	*Owner orientation on operation and maintenance of unit			
	****Cost of any required permits, not included			
	*Mechanic Street Generator Installation			
	*Generator is out 6-12 weeks			
	*3/4 deposit required due to being a custom generator			

The above quote is guaranteed for 30 days. If this quote is accepted, please call our office at (920) 568-8882 and we can get your project!
 Thank you!

SUBTOTAL	37,029.60
TAX	0.00

TOTAL	\$37,029.60
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MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Erin Sweeney, Wastewater Utility Superintendent

RE: Review and possible action related to Solar Project Study Engineering Services (Sweeney, Wastewater Superintendent)

BACKGROUND

The Wastewater Plant is evaluating the feasibility of installing a solar field to offset a portion of its energy expenses. The City borrowed funds in 2024 to pursue such a solar project.

DISCUSSION

Staff has procured the services of Donahue Engineering to conduct a comprehensive solar evaluation for the Wastewater Treatment Plant. This assessment will include an analysis of the plant's electrical usage and the development of a solar production model. Donahue will also explore battery storage options and coordinate with We Energies to address the necessary interconnection requirements for both solar and battery systems. As a part of their scope, they will summarize the financial performance, prepare conceptual layouts, conduct budget analysis, identify potential rebates and tax credits, and provide their top recommendations moving forward.

FINANCIAL ANALYSIS

Staff has negotiated a proposal from Donohue & Associates to complete a Solar Study for \$14,800.

RECOMMENDATION

Staff recommends the City Council approve the proposal for a Solar Study from Donohue & Associates at a cost not to exceed \$14,800 to be paid for using the funds borrowed for that purpose.

ATTACHMENTS

1. Solar Study Draft Agreement



ENGINEERING SERVICES AGREEMENT

WWTP Solar Study (Project)

This Agreement is by and between:

City of Fort Atkinson (Owner)
101 North Main Street
Fort Atkinson, WI 53538

and

Donohue & Associates, Inc. (Donohue)
3311 Weeden Creek Road
Sheboygan, WI 53081

Who agree as follows:

Owner hereby engages Donohue to perform the Services set forth in Part I for the compensation set forth in Part III. Donohue will be authorized to commence the Services upon execution and receipt of this Agreement from Owner. Owner and Donohue agree that this signature page, together with Parts I through IV attached, constitute the entire agreement for this Project.

APPROVED FOR OWNER

By: _____

Printed Name: _____

Title: _____

Date: _____

APPROVED FOR DONOHUE

By: Michael Stohl _____

Printed Name: Michael Stohl _____

Title: Vice President _____

Date: May 16, 2025 _____

PART I
PROJECT DESCRIPTION/SCOPE OF SERVICES/TIMING

A. PROJECT DESCRIPTION

The City plans to install renewable power that can be utilized at their Wastewater Treatment Plant (WWTP). This project will evaluate the amount of solar that can be installed and how it can be interconnected to the existing WWTP electrical distribution equipment. It is assumed that the solar power inverters will produce 600-volt power that will be stepped up to 24.9 kilovolt (kV). A new switchgear bay will be added to the main switchgear allowing the solar to be utilized anywhere within the WWTP.

B. SCOPE OF SERVICES

Services to be provided by Donohue for this Project under this Agreement are as follows:

The objective of the solar evaluation is to assist the City with assessing a conceptual solar and potential battery storage system at the WWTP.

1. Evaluation of electrical usage
 - a. Evaluation of the existing electrical usage at the WWTP which will include peak, average, and low usages as they relate to time of day and time of year.
2. Perform solar production model
 - a. Perform a solar production model utilizing Helioscope, a solar power design tool. This software will calculate annual solar production for the proposed solar areas. One conceptual system will be evaluated:
 - i. Wooded area south of the WWTP. The area will be modeled to maximize the solar output while avoiding wetlands (as established in the existing wetland delineation) and capped at 1 megawatt.
3. Model Battery Energy Storage Systems
 - a. Model Battery Energy Storage systems to determine necessary size to avoid exportation of power.
4. WE Energies Coordination
 - a. Preliminary Utility coordination for solar and battery storage interconnection requirements.
5. Energy Model and Technical Memorandum
 - a. The following will be summarized in a technical memorandum:
 - i. Financial performance analysis of solar and battery storage systems.
 - ii. Prepare conceptual figures to include solar and battery energy storage systems.
 - iii. Budgetary cost estimate for the recommended solution.
 - iv. Research list of potential tax credits, rebates, and incentives. These incentives will be included in the energy modeling financial performance analysis.
 - v. Recommendations for solar and/or battery energy storage solutions.

C. PROJECT TIMING

1. Donohue shall be authorized to commence the Services set forth herein upon execution of this Agreement. The draft technical memorandum will be delivered within four months on Notice to Proceed.
2. Donohue's services under this Agreement will be considered complete when Donohue has delivered to Owner the final technical memorandum defined under Scope of Services.

PART II OWNER RESPONSIBILITIES

A. In addition to other responsibilities of Owner set forth in this Agreement, Owner shall:

1. Identify a person authorized to act as the Owner's representative to respond to questions and make decisions on behalf of Owner, accept completed documents, approve payments to Donohue, and serve as liaison with Donohue as necessary for Donohue to complete its Services.
2. Furnish to Donohue copies of existing documents and data pertinent to Donohue's Scope of Services, including but not limited to and where applicable: design and record drawings for existing facilities; property descriptions, land use restrictions, surveys, geotechnical and environmental studies, or assessments.
3. Owner shall be responsible for all requirements and instructions that it furnishes to Donohue pursuant to this Agreement, and for the accuracy and completeness of all reports, data, programs, and other information furnished by Owner to Donohue pursuant to this Agreement. Donohue may use and rely upon such requirements, instructions, reports, data, programs, and information in performing or furnishing services under this Agreement, subject to any express limitations or reservations provided by Owner applicable to the furnished items.
4. Provide to Donohue existing information regarding the existence and locations of utilities and underground facilities.
5. Provide Donohue safe access to premises necessary for Donohue to provide the Services.
6. Inform Donohue whenever Owner observes or becomes aware of a Hazardous Environmental Conditions, as defined in Part IV.3. of this Agreement, that may affect Donohue's Scope of Services or time for performance.

PART III
COMPENSATION, BILLING AND PAYMENT

- A. Compensation for the work as defined in the Scope of Services (Part I) of this Agreement shall be a lump sum of \$14,800.
- B. Donohue will bill Owner monthly, with net payment due in 30 days. The invoice will contain a calculation of the amount of lump sum due based on percentage of Project completed during the billing period.
- C. Donohue will notify Owner if Project scope changes require modifications to the above-stated contract value. Services relative to scope changes will not be initiated without written authorization from Owner.

PART IV - STANDARD TERMS AND CONDITIONS

1. STANDARD OF CARE. Donohue's Services shall be performed in accordance with the standard of professional practice ordinarily exercised by the applicable profession under similar circumstances at the same time and in the locality where the Services are performed. Professional services are not subject to, and Donohue does not provide, any warranty or guarantee, express or implied. Any warranties or guarantees contained in any purchase orders, requisitions, or notices to proceed issued by Owner are void and not binding upon Donohue. Notwithstanding any other representations made elsewhere in this Agreement or in the execution of the Project, this Standard of Care shall not be modified. Donohue shall act as an independent consultant at all times during the performance of its services, and no terms of this Agreement, either express or implied, shall create an agency or fiduciary relationship.

2. CHANGE OF SCOPE. The Scope of Services set forth in this Agreement is based on facts known at the time of execution of this Agreement, including, if applicable, information supplied by Owner. For some projects involving conceptual or process development services, scope may not be fully definable during initial phases. As the Project progresses, facts discovered may indicate that the scope must be redefined. Donohue will promptly provide Owner with a written amendment to this Agreement to recognize such change.

3. HAZARDOUS ENVIRONMENTAL CONDITIONS. Unless expressly stated otherwise in the Scope of Services (Part I) of this Agreement, Donohue's scope of services does not include any services relating to a Hazardous Environmental Condition, including but not limited to the presence at the Project site of asbestos, mold, PCBs, petroleum, hazardous substances or any other pollutant or contaminant, as those terms are defined in pertinent federal, state, and local laws. In the event Donohue or any other party encounters a Hazardous Environmental Condition, Donohue may at its option suspend performance of services until Owner: a) retains appropriate consultants or contractors to identify and remediate or remove the Hazardous Environmental Condition; and b) warrants that the Project site is in full compliance with all applicable environmental laws.

4. SAFETY. Unless specifically included as a service to be provided under this Agreement, Donohue specifically disclaims any authority or responsibility for general job site safety, or the safety of persons (other than Donohue employees) or property.

5. DELAYS. If performance of Donohue's Services is delayed through no fault of Donohue, Donohue shall be entitled to an extension of time equal to the delay and an equitable adjustment in compensation.

6. TERMINATION/SUSPENSION. Either party may terminate this Agreement upon 30 days written notice to the other party. Owner shall pay Donohue for all Services, including profit relating thereto, rendered prior to termination, plus any expenses of termination. If either party defaults in its obligations under this Agreement (including Owner's obligation to make required payments), the non-defaulting party may, after giving seven days written notice, suspend performance under this Agreement. The non-defaulting party may not suspend performance if the defaulting party commences to cure such default within the seven-day notice period and completes such cure within a reasonable period of time.

Donohue may terminate this Agreement upon seven days written notice if: a) Donohue believes that Donohue is being requested by Owner to perform services contrary to law or Donohue's responsibilities as a licensed professional; or b) Donohue's Services for the Project are delayed, suspended, or interrupted for a period of at least 90 days for reasons not attributable to Donohue's performance of Services; or c) Owner has failed to pay any amount due and owing to Donohue for a period of at least 60 days. Donohue shall have no liability to Owner on account of such termination.

7. OPINIONS OF CONSTRUCTION COST. Any opinion of construction costs prepared by Donohue is supplied for the general guidance of the Owner only. Since Donohue has no control over competitive bidding or market conditions, Donohue cannot guarantee the accuracy of such opinions as compared to contract bids or actual costs to Owner.

8. RELATIONSHIP TO CONTRACTORS. Donohue shall serve as Owner's professional representative for the Services, and may make recommendations to Owner concerning actions relating to Owner's contractors. Donohue specifically disclaims any authority to direct or supervise the means, methods, techniques, sequences or procedures of construction selected or used by Owner's contractors. Donohue neither guarantees the performance of any construction contractor nor assumes responsibility for any contractor's failure to perform in accordance with the construction contract documents.

9. CONSTRUCTION REVIEW. For projects involving construction, Owner acknowledges that under generally accepted professional practice, interpretations of construction documents in the field are normally required, and that performance of construction-related services by the design professional for the Project permits errors or omissions to be identified and corrected at comparatively low cost. Performance of construction-related professional services by a third party or the Owner risks misinterpretation or alternate interpretation of the design intent. Owner agrees to hold Donohue harmless from any claims resulting from performance of construction-related professional services by persons other than Donohue.

10. BETTERMENT. If any item or component of the Project is required due to omission from the construction documents, Donohue's liability shall be limited to the reasonable costs of correction of the construction, less the cost to the Owner if the omitted item or component had been initially included in the construction contract documents. It is intended by this provision that Donohue will not be responsible for any cost or expense that provides betterment, upgrade, or enhancement of the Project.

11. INSURANCE. Donohue will maintain Professional Liability, Commercial General Liability, Automobile, Worker's Compensation, and Employer's Liability insurance coverage in amounts in accordance with legal and Donohue's business requirements. Donohue shall provide to Owner certificates demonstrating such coverage upon request. For projects involving construction, Owner agrees to protect Donohue's interests through appropriate property and liability insurance, and to require its construction contractor, if any, to include Donohue as an additional insured on Contractor's policies relating to the Project. Donohue's coverages referenced above shall, in such case, be excess over contractor's primary coverage.

12. INDEMNIFICATION. To the fullest extent permitted by law, Owner and Donohue each agree to indemnify the other party and the other party's officers, directors, partners, employees, and representatives, but not defend, from and against losses, damages, and judgments arising from claims by third parties, including reasonable attorneys' fees and expenses recoverable under applicable law, but only to the extent they are found to be

caused by a negligent act, error, or omission of the indemnifying party or any of the indemnifying party's officers, directors, members, partners, agents, employees, or subconsultants in the performance of services under this Agreement. If claims, losses, damages, and judgments are found to be caused by the joint or concurrent negligence of Owner and Donohue, they shall be borne by each party in proportion to its negligence.

To the fullest extent permitted by law, Owner shall indemnify and hold harmless Donohue, its employees, agents, and representatives, and Donohue's subconsultants, from and against any loss, liability, claims and damages caused by, arising out of, or resulting from the presence at the Project site of asbestos, mold, PCBs, petroleum, hazardous substances, or any other pollutant or contaminant, as those terms are defined in pertinent federal, state, and local laws, except to the extent that the loss, liability, or damages are caused solely by the willful misconduct or negligence of Donohue, its agents or employees.

13. LIMITATIONS OF LIABILITY. No owner, shareholder, principal, employee or agent of Donohue shall have individual liability to Owner; and Owner covenants and agrees not to sue any such individual in connection with the Services under this Agreement.

Neither Donohue, Donohue's subconsultants, nor their agents or employees shall be jointly, severally or individually liable to the Owner in excess of the compensation to be paid pursuant to this Agreement or two hundred fifty thousand dollars (\$250,000), whichever is greater, by reason of any act or omission, in tort or contract, including breach of contract, breach of warranty or negligence. To the fullest extent permitted by Laws and Regulations, Owner and Donohue waive against each other, and the other's employees, officers, directors, members, insurers, partners, and consultants, any and all claims for or entitlement to special, incidental, indirect, or consequential damages arising out of, resulting from, or in any way related to this Agreement or the Project, from any cause or causes.

14. OWNERSHIP AND REUSE OF PROJECT DOCUMENTS. All documents and other deliverables, in all media, prepared by or on behalf of Donohue in connection with this Agreement are instruments of service, and Donohue shall hold the copyright to and all other ownership and property interests in such instruments of service. Upon payment for services rendered, Donohue grants Owner a license to use instruments of Donohue's services for the purpose of constructing, occupying or maintaining the Project. Owner shall not reuse any such documents or other deliverables pertaining to the Project for any purpose other than that for which such documents or deliverables were originally prepared. Owner shall not cause or allow the alteration of such documents or deliverables without written verification and approval by Donohue for the specific purpose intended, and any alteration by Owner shall be at the Owner's sole risk. Owner agrees to indemnify and hold harmless Donohue from all claims, damages, and expenses (including reasonable attorneys' and consultants' fees), arising out of such reuse or alteration by Owner or others acting through Owner.

15. ELECTRONIC MEDIA. Copies of documents that may be relied upon by Owner are limited to printed copies that are signed and sealed by Donohue. Files or information in electronic media are furnished by Donohue to Owner solely for convenience of Owner. Because data stored in electronic media format can deteriorate or be modified, the Owner agrees to perform acceptance tests within 60 days. Donohue will not be responsible to correct any errors or for maintenance of documents in electronic media format after the acceptance period.

16. RECORDS RETENTION. Donohue shall retain on file, for a period of five years following completion or termination of its services, copies of contract documents, final deliverables, and accounting records related to Engineer's services under this Agreement. Upon Owner's request, Donohue shall provide a copy of maintained item to Owner at cost.

17. AMENDMENT. This Agreement, upon execution by both parties hereto, can be amended only by a written instrument signed by both parties.

18. SUCCESSORS, BENEFICIARIES AND ASSIGNEES. This Agreement shall be binding upon and inure to the benefit of the owners, administrators, executors, successors, and legal representatives of the Owner and Donohue. The rights and obligations of this Agreement cannot be assigned by either party without written permission of the other party. This Agreement shall be binding upon and inure to the benefit of any permitted assignees.

19. NO THIRD-PARTY BENEFICIARY. Nothing contained in this Agreement, nor the performance of the parties hereunder, is intended to benefit, nor shall inure to the benefit of, any third party, including Owner's construction contractors, if any.

20. STATUTE OF LIMITATION. To the fullest extent permitted by law, parties agree that, except for claims for indemnification, the time period for bringing claims under this Agreement shall expire one year after Substantial Completion, as defined by the construction documents prepared by Donohue, or, if no construction documents are prepared, one year after the submittal date of Donohue's most recent invoice for this Agreement. Any action not brought within that one-year time period shall be barred, without regard to any other limitations period set forth by law or statute.

21. DISPUTE RESOLUTION. Owner and Donohue shall provide written notice of a dispute within a reasonable time and after the event giving rise to the dispute. Owner and Donohue agree to negotiate any dispute between them in good faith for a period of 30 days following such notice. Owner and Donohue may mutually agree to submit any dispute to mediation or binding arbitration, but doing so shall not be required or a prerequisite to initiating a lawsuit to enforce this Agreement.

22. CONTROLLING LAW. This Agreement is governed by the laws of the state in which the Project is located.

23. NO WAIVER. No waiver by either party of any default by the other party in the performance of any particular section of this Agreement shall invalidate any other section of this Agreement or operate as a waiver of any future default, whether like or different in character.

24. SEVERABILITY. The various terms, provisions and covenants herein contained shall be deemed to be separate and severable, and the invalidity or unenforceability of any of them shall not affect or impair the validity or enforceability of the remainder.

25. AUTHORITY. The persons signing this Agreement warrant that they have the authority to sign as, or on behalf of, the party for whom they are signing.

26. SURVIVAL. All express representations, indemnifications and limitations of liability included in this Agreement will survive its completion or termination for any reason.



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Minetta Lippert, Library Director

RE: Review and possible action relating to the emergency replacement of the library's rooftop condenser (Lippert, Library Director)

BACKGROUND

The library needs to either repair or replace the rooftop air conditioner condenser. This is an emergency purchase that was not expected or planned for.

On June 26th, library staff noticed that the air conditioning for the south half of the building was not working. Two technicians from Klecker's came on June 27th and found that the center condenser fan motor bracket had broken on the rooftop condenser, causing the fan motor and blade to fall into and severely damage the condenser coil. The library's current rooftop condenser is a 60-ton Trane unit that was installed in 2010.

Klecker's technicians were able to get stages one and two of the rooftop unit working on June 27th, but reported that the rest of the unit needed serious repairs. By Monday, June 30th, the temporary repair had failed. Temperatures inside the library continued to rise. City staff recommended companies to contact for second opinions and also explored other solutions such as renting air conditioners.

While visiting on July 3rd to provide a quote for repairs or replacement, technicians from Ahern repaired one stage of the rooftop unit. Thankfully, this fix has maintained more comfortable temperatures inside the library, though these repairs are only intended to be temporary.

DISCUSSION

Library staff began gathering quotes to either repair or replace the rooftop condenser. After conversations with HVAC professionals and City staff, library staff believe that it would be wise to replace the rooftop condenser rather than pursue repairs. ASHRAE—the American Society of Heating, Refrigerating, and Air-Conditioning Engineers—estimates the life cycle for these units to be 20 years, though this also depends on use and preventive maintenance. Additionally, replacing the rooftop condenser with another unit that uses R410a refrigerant now will be more cost effective than replacing the entire system to handle R454b refrigerant in the next few years. Either repairing or replacing the unit will involve a crane and closing down

Merchants Avenue for a few hours.

Library staff contacted the following companies for estimates: Klecker's Heating and Air Conditioning, Total Mechanical, Ahern, IKM Building Solutions, Kettle Moraine Heating & Air Conditioning, Lake Country Heating & Cooling, and Harker Heating & Cooling. Klecker's only provided a quote for repairing the unit and recommended that staff reach out to bigger HVAC companies if we choose to replace the unit. Lake Country Heating & Cooling and Kettle Moraine Heating & Air Conditioning ultimately decided to not submit proposals.

Staff received the following proposals:

Total Mechanical

Cost estimate: \$85,000

Lead time: 9 weeks

Warranty: 1-year parts and labor warranty on the whole unit and 5-year warranty on the compressor parts only; option for a 2-year full warranty for an additional cost of about \$7,500

Notes: Randy Bardeleben from Total Mechanical noted that the original quote is valid for only 20 days due to the unpredictability of the market. Total Mechanical will re-evaluate the cost when the project is awarded. Randy recommended adding a 3% contingency to cover unknown price increases.

Ahern

Cost estimate: \$95,000

Lead time: 7-8 weeks

Warranty: 1-year parts and labor warranty for the whole unit, 5-year compressor replacement warranty, and 1-year refrigerant warranty.

IKM Building Solutions

Cost estimate: \$89,642

Lead time:

Warranty: 1-year parts and labor warranty; option for and extended 2-year warranty for an additional 5%

Harker Heating & Cooling

Cost estimate: \$104,676

Lead time: 7-9 weeks plus shipping to Harker

Warranty: 1-year parts and labor warranty; manufacturer's warranty on unit

FINANCIAL ANALYSIS

Library staff did not expect the damage to the rooftop condenser and therefore did not budget for the expense. However, it is essential to maintain an air-conditioned environment inside the library for the sake of staff and patrons and to best preserve library materials. Additionally, the Dwight Foster Public Library is listed as a cooling shelter with Jefferson County's Emergency Management office.

City staff consider this purchase an “emergency purchase” as outlined in the City’s Financial Stability Guide Book, and therefore, typical purchasing guidelines do not apply. Regardless of the exemption from typical policies, library staff contacted seven HVAC companies for quotes in recognition of the high cost of either repairing or replacing the rooftop condenser. (Note that ultimately only four HVAC companies provided replacement proposals.)

Wis. Stat. § 43.58(1) states, "The library board shall have exclusive control of the expenditure of all moneys collected, donated, or appropriated for the library fund." In general practice, this means that once revenues (levied by the City, donated, or allocated by the County) are put into the library fund, the Library Board has exclusive control over the associated expenditures. The City's Financial Stability Guidelines indicate that purchases over a certain threshold must be approved by the City Council. While library expenditures are generally outside the purview of the City Council, staff is bringing this proposal to City Council for review to follow the City's financial policy.

On Monday, August 11, 2025, the Library Board approved the rooftop condenser replacement project with Total Mechanical and to reimburse this cost with funds from the library's trust.

RECOMMENDATION

Staff recommends the City Council approve the proposal from Total Mechanical to replace the library’s rooftop condenser at a cost not to exceed \$87,550 (\$85,000 initial estimated cost plus \$2,550 as a 3% contingency reflecting the uncertainty of the market) with funding from the library’s trust at Edward Jones.

ATTACHMENTS

1. Total Mechanical Dwight Foster Library Ft Atkinson 60T Condenser-Total
2. Ahern Q.7.8.25(552262)Condenser Replacement
3. IKM Fort Atkinson Library Condenser Replacement 7.10.25
4. Harker Fort Atkinson Library AC Replacement Proposal

July 7, 2025

Proposal #25-4098

Minetta Lippert
Dwight Foster Public Library

RE: Dwight Foster Public Library 60 Ton Condenser Replacement
HVAC

We propose to furnish and install the following.

- Demo existing 60-ton condenser
- Provide and install (1) 60-ton condenser
- Disconnect and reconnect refrigeration piping
- Disconnect and reconnect electrical
- Provide refrigeration
- Crane & rigging included
- Reconnect existing controls (No control changes included)
- Lead time about 9 weeks

For the Sum of: \$ 85,000.00

The following are specifically **excluded** from our proposal:

- Overtime or premium time charges
- Temporary heating, ventilation, or cooling including filter changing during construction
- Dumpsters
- Liquidated damages
- Painting or touch-up paint, including painting of ductwork and piping
- Cutting or patching of any type. Repair or restoration by others
- Roof work of any type. Including cutting, coring or patching
- Concrete work of any type, including equipment pads
- Payment, performance or bid bond

We have based our proposal on the best commodity pricing & availability at the current time; however, due to the volatility with products across the nation our proposal is only valid for up to 20 days from the date of this proposal. Tariffs, trade restrictions, tax changes, and/or supply chain disruptions may change material costs and lead times at any time. We reserve the right to pass through additional costs and/or schedule impacts and will provide documentation for client review prior to implementation.

We appreciate the opportunity to work with you on this and all future projects. Should you have any questions, or require additional information, please do not hesitate to contact me directly at (262) 522-8683, or email me at rbardeleben@total-mechanical.com

July 7, 2025
Dwight Foster Public Library 60- ton Condenser
Proposal #25-4098
Page 2 of 3

Respectfully Submitted,
TOTAL Mechanical, Inc. - Janesville Office



Randy Bardeleben
Estimator

July 7, 2025

Dwight Foster Public Library 60- ton Condenser

Proposal #25-4098

Page 3 of 3

TERMS AND CONDITIONS OF SALE

LIEN NOTICE · AS REQUIRED BY THE WISCONSIN CONSTRUCTION LIEN LAW, TOTAL MECHANICAL, INC. HEREBY NOTIFIES OWNER THAT PERSONS OR COMPANIES FURNISHING LABOR OR MATERIALS FOR THE CONSTRUCTION ON OWNER'S LAND MAY HAVE LIEN RIGHTS ON OWNER'S LAND AND BUILDINGS IF NOT PAID. THOSE ENTITLED TO LIEN RIGHTS IN ADDITION TO TOTAL MECHANICAL, INC. ARE THOSE WHO CONTRACT DIRECTLY WITH THE OWNER OR THOSE WHO GIVE THE OWNER NOTICE WITHIN SIXTY DAYS AFTER THEY FIRST FURNISH LABOR OR MATERIALS FOR THE CONSTRUCTION. ACCORDINGLY, OWNER WILL PROBABLY RECEIVE NOTICES FROM THOSE WHO FURNISH LABOR OR MATERIALS FOR THE CONSTRUCTION, AND SHOULD GIVE A COPY OF EACH NOTICE RECEIVED TO HIS MORTGAGE LENDER, IF ANY, TOTAL MECHANICAL, INC. AGREES TO COOPERATE WITH THE OWNER AND HIS LENDER, IF ANY, TO SEE THAT ALL POTENTIAL LIEN CLAIMANTS ARE DULY PAID.

WARRANTY · TOTAL MECHANICAL, INC. warrants and guarantees to the OWNER (meaning the buyer as shown on the front of this document) that all materials and equipment, and the work to be performed hereunder, will be of good quality, free from faults and defects, but such warranty shall extend only for a period of one year from the date of substantial completion. THIS WARRANTY IS IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, OF MERCHANTABILITY, FITNESS FOR PARTICULAR PURPOSE, PERFORMANCE OR OTHERWISE. TOTAL MECHANICAL, INC.'S liability under the warranty is strictly and exclusively limited to the repair or replacement at the job site of such work (including materials and equipment) as is found to be defective within such one-year period, and with respect to which the OWNER has given TOTAL MECHANICAL, INC. prompt written notice within such one-year period. No allowance will be made for repairs or alterations unless made with TOTAL MECHANICAL, INC.'S prior written consent or approval. IN NO EVENT SHALL TOTAL MECHANICAL, INC. BE LIABLE FOR CLAIMS FOR ANY OTHER DAMAGES BASED UPON BREACH OF EXPRESS OR IMPLIED WARRANTY OR NEGLIGENCE, EITHER DIRECT OR IMMEDIATE, FORESEEABLE, CONSEQUENTIAL, OR SPECIAL. This paragraph states TOTAL MECHANICAL, INC.'S entire liability with respect to warranties, guarantees or representations, express or implied.

DAMAGES · TOTAL MECHANICAL, INC. IS NOT RESPONSIBLE FOR SPECIAL INCIDENTAL, OR CONSEQUENTIAL DAMAGES RESULTING FROM ANY BREACH OF WARRANTY, OR UNDER ANY OTHER LEGAL THEORY, INCLUDING LOST PROFITS, DOWNTIME, GOODWILL, DAMAGE TO OR REPLACEMENT OF EQUIPMENT AND PROPERTY, AND ANY COSTS FOR RECOVERING, REFURBISHING, REPRODUCTION OR ANY OTHER REHABILITATION OF A CONDITION, CIRCUMSTANCE OR PRODUCT.

EXTRAS · Any extra work requested by the OWNER, and performed by TOTAL MECHANICAL, INC., shall be performed on a time and material basis (unless otherwise agreed in writing) including such overhead and profit as may then be standard for work of a similar nature, and all such extra work shall be subject to all of the terms and conditions hereof.

DELAYS · Any scheduled completion date is approximate and subject to delays caused by fire, strike or other labor disturbance. Acts of God, shortages of materials or failure of suppliers or subcontractors to satisfactorily meet scheduled deliveries or any other factor beyond TOTAL MECHANICAL, INC.'S control, none of which factors or events shall give rise to any liability on the part of TOTAL MECHANICAL, INC., but shall extend the completion date for a period equivalent to the time lost by reason of all such factors or events.

PAYMENT TERMS · Unless otherwise agreed in writing, no retention shall apply to any of the work, and payment for all work (including materials and equipment) shall be made by no later than the tenth day of each month for work performed during the preceding month. On time and material work, the number of hours, rate per hour, total of material will be stated on the invoice unless otherwise stated herein. On firm bid contracts, no detail will be required other than a draw against the contract amount, unless otherwise state within.

CONTRACT TERMS · The terms and conditions stated herein shall constitute the complete and exclusive statement of the terms here for, and shall supersede all prior oral and written statements of any kind whatsoever made by the parties of their representatives concern the terms hereof. No statement (except for extra work) or writing subsequent to the date hereof which purports to modify or all of terms and conditions hereof shall be binding unless consented to in writing signed by the party against which enforcement hereof is sought.

INTEREST AND COLLECTION COST · It is agreed that, in the event the OWNER fails to pay the amounts due under the terms of this Agreement when due, interest may be charged by TOTAL MECHANICAL, INC. at a rate of 1.5% per month, for a maximum of 18% per year. OWNER further agrees to pay all costs and expenses incurred by TOTAL MECHANICAL, INC. in collecting or attempting to collect amounts due hereunder, including reasonable attorney's fees.

INDEMNIFICATION · To the fullest extent permitted by law, the OWNER shall defend, indemnify and hold harmless Total Mechanical, Inc., OWNER, general contractor, and their respective officers, agents and employees, from and against all claims, damages, losses, costs, expenses, judgments and liabilities, including but not limited to attorney's fees, costs and expenses, arising out of or in connection with OWNER'S performance of or failure to perform this Agreement, provided that any such claim, damage, loss, costs, expenses, judgments or liabilities are attributable to bodily injury, sickness, disease or death, or to injury or destruction of tangible personal property, including their loss of use resulting there from, that is caused in whole or in part by any act or omission of the OWNER, any subcontractor, anyone directly or indirectly employed by them or anyone for whose acts any of them may be liable, regardless of whether or not it is caused in part by any party indemnified hereunder.

The indemnification obligation under this paragraph shall not be limited in any way by any limitations on the amount or type of damages, compensation or benefits payable by or for the benefit of OWNER or any indemnities under any Worker's Compensation Act, Occupational Disease Act, Disability Benefits Act, or any other employee benefits act. The OWNER further agrees to waive any and all liability limitations based upon the Worker's Compensation Act court interpretations or otherwise.

If the above proposal, subject to the terms and conditions is acceptable, **please sign and return.** Total Mechanical will proceed with the work.



3821 Anderson Road
DeForest, WI 53532
main 608.216.0283

jfahern.com

July 07, 2025

Work Location: Fort Atkinson Library
209 Mechants Ave.
Fort Atkinson, WI 535388

Minetta Lippert
Fort Atkinson Library
209 Mechants Ave.
Fort Atkinson WI 535388

Phone: (920)563-7790

Email: minetta@fortlibrary.org

Quote #: 552262 / 1

MECHANICAL SYSTEM WORK ORDER SERVICE PROPOSAL

Dear Minetta,

We are pleased to submit our proposal for HVAC System services at the above-referenced facility based upon our conversation and / or job site visit.

We will perform the quoted and proposed services per your written approval. If this proposal meets your needs, please sign and send the completed proposal back to rpence@jfahern.com or fax a signed copy to .

The pricing is based on work performed during the normal working hours of 7:00 a.m. to 3:30 p.m., Monday through Friday. This proposal does not include applicable sales tax and is valid for a period of thirty (30) days. The attached General Terms and Conditions shall be made part of this quotation. Once returned to us, we will call to set up an appointment.

Thank you for this opportunity to quote. If you have any questions or require further details, please feel free to call me directly.

Sincerely,

Ryan Pence
Sales, Service Mechanical

Email: rpence@jfahern.com

Enclosure



3821 Anderson Road
DeForest, WI 53532
main 608.216.0283

jfahern.com

HVAC Service Agreement for Fort Atkinson Library

Minetta Lippert
Fort Atkinson Library
209 Mechants Ave.
Fort Atkinson WI 535388

Phone: (920)563-7790

Email: minetta@fortlibrary.org

Quote #: 552262/1

MECHANICAL SYSTEM SERVICES

Scope of Work/Clarifications:

Included:

- Remove old condensing unit from roof and discard
- Install new condensing unit on roof
- Install refrigerant and verify no leaks
- Perform start up of unit and verify proper operation
- All work performed is during regular buisness hours 7AM-3PM

Excluded:

- Electrical
- Overtime labor
- Worked performed after buinssess hours

Tariff Price Escalation

The price set forth in this document has been calculated and determined without any contingency for tariff impacts. Because of uncertainty regarding the implementation, timing and impacts of tariffs, no valid means exist by which the likely effects of tariffs currently can be reasonably assessed. This document is submitted assuming that any tariff impacts upon the proposed price will entitle Ahern to a commensurate equitable adjustment to the price to account for any such increased costs. Such impacts shall include, but not be limited to, costs and delays caused by events beyond Ahern's control that arise from or relate to government-imposed measures, government prohibitions, port or customs delays, or other industrial disturbances, shortages of goods, and other like events resulting from tariffs. If this document contains materials subject to tariffs imposed after the quotation or proposal date, the price shall be adjusted to reflect the actual increase in costs directly attributable to such tariff, duty, or surcharge. Ahern shall provide reasonable documentation evidencing the increased costs.



3821 Anderson Road
DeForest, WI 53532
main 608.216.0283
jfahern.com

Service Location: Fort Atkinson Library
209 Mechants Ave.
Fort Atkinson, WI 535388

1	Date Requested:	Fixed Price	\$95,000.00	Initial if Accepted
Description :	Fort Atkinson Library Condenser Replacement			
Item Notes:				
<u>Equipment</u>		<u>System ID</u>		<u>System Loc</u>

Total for All Services:		\$95,000.00	
Contract Representative		Customer Authorized Representative Signature	
Name:	Ryan Pence	Print Name:	Minetta Lippert
Title:	Sales, Service Mechanical	Signature:	
Date:	07/07/2025	Date:	
		PO #:	

Signed acknowledgement of this agreement confirms acceptance of all the above scope of work and clarifications as well as all the attached Notes and Clarifications and General Terms and Conditions. Any PO reference is for convenience only and such PO does not form a part of these General Terms and Conditions.

1. ENTIRE CONTRACT The parties intend these general terms and conditions together with any scope of work, proposal or quotation attached hereto (collectively the "Contract") to be the final, complete, and exclusive expression of their Contract and the terms and conditions thereof. No changes or additions hereto shall be binding upon Seller unless in writing and signed by an officer of Seller. Any terms or conditions of Purchaser's order different, inconsistent herewith or in addition hereto shall be of no force and effect and are hereby expressly rejected and, Purchaser's order shall be governed only by the Contract. A definite and seasonable expression of acceptance or a written confirmation which is sent to Seller within the time specified in the Purchaser's order operates as an acceptance of the terms specified herein. Every agreement or other undertaking by Seller is expressly conditioned on Purchaser's assent to the terms contained herein. Seller assumes no liability except as expressly provided herein. Additional proposals or scope of work provided by Seller to Purchaser shall be covered by this Contract unless and until Seller and Purchaser execute a new contract in writing expressly superseding this Contract. This Contract and its referenced documents represent the entire and integrated contract between the parties and supersedes all prior negotiations, representations, agreements, or contracts, either written or oral and may not be modified by course of dealing, course of performance or usage of trade, but only modified in writing signed by an authorized representative of each party. This Contract shall extend to and be binding upon the parties and their respective successors and permitted assigns.

2. PROPOSALS AND CONTRACT Seller's proposal or quotation are not subject to cancellation, suspension, or reduction in amount except with Seller's written consent and upon terms which reimburse Seller for work performed, plus reasonable overhead and profit.

3. PRICES In addition to the prices specified herein, Purchaser shall pay for all extra work requested by Purchaser or made necessary because of incompleteness of or inaccuracy in plans or other information submitted by Purchaser with respect to location, type or occupancy, or other details of work to be performed hereunder. If the work to be furnished hereunder constitutes an addition to Purchaser's existing facilities, prices and delivery and completion dates quoted herein are based on information, if any with respect to layout of such facilities now contained in Seller's engineering records. In the event the layout of Purchaser's facilities has been altered or is altered by Purchaser prior to completion of this Contract, Purchaser shall advise Seller of any such alterations and prices and delivery and completion dates quoted herein shall be modified by Seller as may be required because of such alterations. Unless prices are stated by Seller in this or other documents forming a part of this Contract, the prices applicable to the extra work performed shall be Seller's prices in effect at that time.

4. PAYMENT All payments shall be due and payable within thirty (30) days from date of payment application or invoice. A service charge will be charged and added to all payments past due and owed by the Purchaser under this Contract, and at a rate of 18% per annum or if such rate is prohibited under applicable law, then at such lower rate as is the maximum rate permitted to be contracted for under such applicable law. Purchaser shall pay any reasonable attorney's fees incurred in the collection of past due accounts. If the Purchaser fails to pay all or any portion of the amount due, the Seller may, at its option, terminate the Contract, in which event Seller will be obligated to perform no additional work until paid in full.

5. DELAYS Seller shall not be liable for any damage or penalty for delays in work due to acts of God, acts or omissions of the Purchaser, acts of civil or military authorities, government regulations or priorities, quarantines, pandemics, fires, floods, epidemics, quarantine restrictions, war, riots, strikes, differences with workmen, accidents to machinery, inability to obtain necessary labor, materials or manufacturing facilities, delay in transportation, defaults of Seller's subcontractors, failure or delay in furnishing correct or complete information by Purchaser with respect to location or other details of work to be performed hereunder, impossibility, or impracticability of performance or any other cause or causes beyond the control of Seller, whether or not similar to the foregoing in the event of any delay caused as aforesaid, the completion shall be extended for a period equal to any such delay and this Contract shall not be void or voidable as a result of any such delay. In case work is temporarily discontinued by reason of any of the foregoing all unpaid installments of the Contract price less an amount equal to the value of material and labor not furnished shall be due and payable upon receipt of invoice.

6. EXCAVATION When the Seller does the excavating, if water, quick-sand, rock, or other unforeseen obstructions are encountered or shoring

is required, Purchaser shall pay for as extra to the Contract price any additional work involved at Seller's prices for such work then in effect.

7. SITE FACILITIES Purchaser shall furnish all necessary facilities for performance of its work by Seller, adequate space for storage and handling of material, light, water, heat, local telephone, watchman and crane and elevator service, if available, and necessary permits. Where wet pipe system is installed, Purchaser shall supply and maintain sufficient heat to prevent freezing of the system.

8. STRUCTURE AND SITE CONDITIONS While employees of Seller will exercise reasonable care, Seller shall be under no responsibility for loss or damage due to the character, condition or use of foundations, walls or other structures not erected by it or resulting from excavation in proximity thereto, nor for damage resulting from concealed piping, writing, fixtures or other equipment or condition of water pressure. All shoring or protection of foundations, walls, or other structures subject to being disturbed by any excavation required hereunder shall be the responsibility of the Purchaser unless otherwise specified. Purchaser warrants the sufficiency of the structure to support the sprinkler system and its related equipment (including tanks). The Purchaser shall have all things in readiness for installation, including, but not limited to, materials lay-down areas or suitable working base, and facilities for erection at the time the materials are delivered. In the event the Purchaser shall fail to have all things in readiness for erection at the time of receipt of the materials at the place of erection, the Purchaser shall reimburse Seller for any and all expenses caused by such failure. Failure to make areas available to Seller during performance in accord with schedules which are the basis of Seller's proposal shall be considered a failure to have all things in readiness for erection in accord with the terms of this Contract.

9. CODE COMPLIANCE Seller does not undertake an obligation to inspect for compliance with laws or regulations unless specifically stated in the Scope of Work. Purchaser acknowledges that the Authority Having Jurisdiction may establish additional requirements for compliance with local codes.

10. REPORTS When inspection and/or test services are selected such inspection and/or test services shall be completed on Seller's then current inspection form which shall be provided to Purchaser, and, where applicable, Seller may submit a copy thereof to the local Authority Having Jurisdiction. The inspection form and recommendations by Seller are only advisory in nature and are intended to assist Purchaser in reducing the risk of loss to property by indicating obvious defects or impairments noted on the system and equipment inspected and/or tested. Final responsibility for the condition and operation of the system, equipment and components lies with Purchaser. The Purchaser shall promptly notify Seller of any malfunction in the system which comes to Purchaser's attention. If upon inspection Seller determines that repairs are recommended, repair charges will be submitted for approval prior to any work. Should such repair work be declined Seller shall be relieved from any and all liability arising therefrom. **UNLESS OTHERWISE SPECIFIED IN THIS CONTRACT, ANY INSPECTION (AND IF SPECIFIED TESTING) PROVIDED UNDER THIS CONTRACT DOES NOT INCLUDE ANY MAINTENANCE, REPAIRS, ALTERATIONS, REPLACEMENT OF PARTS, OR ANY FIELD ADJUSTMENTS WHATSOEVER, NOR DOES IT INCLUDE THE CORRECTION OF ANY DEFICIENCIES IDENTIFIED BY SELLER TO PURCHASER. SELLER SHALL NOT BE RESPONSIBLE FOR EQUIPMENT FAILURE OCCURRING WHILE SELLER IS IN THE PROCESS OF FOLLOWING ITS INSPECTION TECHNIQUES, WHERE THE FAILURE ALSO RESULTS FROM THE AGE OR OBSOLESCENCE OF THE ITEM OR DUE TO NORMAL WEAR AND TEAR. THIS CONTRACT DOES NOT COVER SYSTEMS, EQUIPMENT, COMPONENTS OR PARTS THAT ARE BELOW GRADE, BEHIND WALLS OR OTHER OBSTRUCTIONS.**

11. ALARM MONITORING SERVICES Any reference to alarm monitoring services in this Contract is included for pricing purposes only. Alarm monitoring services are performed pursuant to the terms and conditions of Seller's standard alarm monitoring services agreement which will be provided under separate agreement upon purchase.

12. EXCLUSIVE LIMITED WARRANTY Seller warrants that any new equipment provided by Seller under this Contract will be free from defects in material and workmanship arising from normal usage for a period of one (1) year from delivery of said equipment, or, if installed by Seller, for one (1) year from installation. This warranty does not extend to normal wear and tear, any equipment that others have repaired, abused, altered, misused or that has not been properly and reasonably maintained. All parts as recorded on the face of the work order or invoice are warranted for a period of thirty (30) days, or longer, if the manufacturer's specific warranty provides additional time. If a part installed by Seller fails within thirty (30) days of

installation, Seller shall furnish a replacement part free of charge. Parts furnished with a manufacturer's specific warranty shall be furnished in accordance with the specific warranty. Seller will charge for labor to repair or replace parts unless the labor is necessary to correct a repair previously made by Seller within thirty (30) days of the date of the original repair. Refrigerant leak repairs are warranted for a period of thirty (30) days. If within thirty (30) days of the original repair a leak redevelops, Seller shall furnish at no cost to Purchaser the necessary refrigerant and labor for the repair. Any other loss of refrigerant will be billed at Seller's normal selling price. EXCEPT AS EXPRESSLY SET FORTH HEREIN, SELLER DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED INCLUDING BUT NOT LIMITED TO ANY IMPLIED OR EXPRESS WARRANTIES OF MERCHANTABILITY AND WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE AS TO ANY SERVICES PERFORMED OR THE PRODUCTS, SYSTEMS OR EQUIPMENT WHICH ARE FURNISHED BY SELLER. No premise not contained herein, or affirmation of fact made by an employee, agent or representative of Seller shall constitute a warranty by Seller or give rise to any liability or obligation. Any repairs, adjustments or connections performed by Purchaser, or any third party shall void all warranties.

Seller's liability to Purchaser for personal injury, death or property damage to the extent arising from performance under these terms and conditions shall be limited to an amount not to exceed one (1) year's Contract price. Purchaser shall indemnify, defend, and hold Seller harmless from any and all third-party claims for personal injury, death, or property damage, arising from Purchaser's failure to maintain systems and equipment or keep them in operative condition, whether based upon contract, warranty, tort, strict liability or otherwise. In no event shall Seller be liable for any special, indirect, incidental, consequential, liquidated, penal, or any economic loss damages of any kind, including but not limited to loss of use of the Purchaser's property, lost profit or lost production, whether claimed by the Purchaser or by any third party; irrespective of whether claims or actions for such damages are based upon contract, warranty, negligence, tort, strict liability or otherwise. The foregoing limitation of warranty and liability shall supersede any and all other warranty and liability terms previously given or hereafter given unless amendment is made by an officer of Seller in writing.

13. MODIFICATIONS AND SUBSTITUTIONS Seller reserves the right to modify material of Seller's design sold hereunder and/or the drawings and specifications relating thereto, or to substitute material of later design to fulfill this Contract provided that the modifications or substitutions will not materially affect the performance of the material or lessen in any way the utility of the material to the Purchaser.

14. SEVERABILITY If any provision of this Contract is held by any court or other competent authority to be void or unenforceable in whole or in part, this Contract will continue to be valid as to the other remaining and unaffected provisions.

15. WAIVER. Seller's waiver or acceptance of any breach by Purchaser, or Seller's failure to insist, in any one or more instances, upon the strict performance of any provision of the Contract, or to exercise any right herein, shall not be construed as a waiver or relinquishment by Seller of such provision or right in any other instance.

16. ASSIGNMENT Any assignment of this Contract by Purchaser without the written consent of Seller shall be null and void. Seller may assign to its subsidiaries and affiliates at any time.

17. CHANGES, ALTERATIONS, ADDITIONS Changes, alterations and additions to the plans, specifications, or construction schedule for this Contract shall be invalid unless approved in writing by Seller. For any such changes approved by Seller in this manner, which will increase or decrease the cost and expense of work to Seller, there shall be a corresponding increase or decrease in the Contract price herein provided. The value of additional work shall be agreed upon prior to the performance of said work. However, if no agreement is reached prior to the performance of additional

work approved in the manner herein described, and Seller elects to continue performance so as to avoid delays, then the estimate of Seller's Estimating Department as to the value of the work shall be deemed accepted by the Purchaser.

18. LEGAL NOTICE For the purpose of any notice permitted or required to be given hereunder, such notice or notices shall be deemed given when received.

19. INSURANCE Purchaser shall name Seller as an additional insured on Purchaser's general liability and auto liability policies, which shall be provided on a primary, non-contributory basis. Purchaser shall carry property and casualty coverage and/or builders risk coverage with sufficient limits to cover any potential loss or damage. A waiver of subrogation is required for all policies required herein. Purchaser agrees that with respect to any losses covered by this Contract Purchaser hereby waives and releases Purchaser, its officers, directors, employees, and agents, from any and all claims and liability or responsibility with respect to such losses, including losses arising out of the inability to conduct business. Purchaser agrees that its insurers shall have no right of subrogation against Seller and its insurers on account of this release.

20. TERMS AND CONDITIONS/TECHNICAL SPECIFICATIONS Terms and conditions specified herein shall be in addition to those set out in Seller's technical specifications and any inconsistencies shall be resolved by Seller's authorized representative.

21. CLAIMS AND CHOICE OF LAW Within five days of the occurrence of any event or matter giving rise to a dispute(s), either party has the right to provide the other Party with a written Notice of Dispute. Within fifteen days of receipt of the Notice of Dispute, the Parties shall commence direct negotiations with management officers authorized to enter into a binding resolution or settlement of the dispute. Should direct negotiations fail to resolve the dispute(s) within fifteen days of the commencement of negotiations, all disputes, claims and matters in controversy relating to or arising from the Order, shall be resolved by binding arbitration in accordance with the Construction Industry Arbitration Rules of the American Arbitration Association, unless Seller provides written notice to Purchaser that it has elected in its sole discretion, that all such disputes, claims, and matters in controversy shall be decided by litigation. The Parties further agree that the sole and exclusive location and forum for such arbitration or litigation shall be the Fond du Lac County, Wisconsin Circuit Court. If this venue is deemed unenforceable by a court of competent jurisdiction, the parties agree that the alternative venue shall be the Federal District Court for the Eastern District of Wisconsin, Green Bay Division. EACH PARTY HEREBY IRREVOCABLY WAIVES, TO THE FULLEST EXTENT PERMITTED BY APPLICABLE LAW, ANY RIGHT IT MAY HAVE TO A TRIAL BY JURY IN ANY LEGAL PROCEEDING DIRECTLY OR INDIRECTLY ARISING OUT OF OR RELATING TO THIS ORDER OR THE TRANSACTIONS CONTEMPLATED HEREBY (WHETHER BASED ON CONTRACT, TORT OR ANY OTHER THEORY). EACH PARTY (A) AGREES THAT, IN THE EVENT OF LITIGATION, IT SHALL SEEK TO ENFORCE, AND SHALL ABIDE BY, THE FOREGOING WAIVER AND (B) ACKNOWLEDGES THAT IT HAS BEEN INDUCED TO ENTER INTO THIS ORDER BY, AMONG OTHER THINGS, THE MUTUAL WAIVERS AND AGREEMENTS IN THIS SECTION. The parties agree that no suit, or cause of action or other proceeding shall be brought against either party more than one (1) year after the accrual of the cause of action or one (1) year after the claims arise, whichever is shorter, whether known or unknown when the claims arise or whether based on tort, contract, or any other legal theory. The laws of Wisconsin shall govern the validity, enforceability, and interpretation of this Contract.

22. OVERTIME Unless otherwise specified by Seller, all installation work will be performed during regular working hours. If Purchaser shall require any overtime labor, Purchaser agrees to reimburse Seller for the overtime premium of the same. If overtime labor is required on an emergency basis, Purchaser agrees to reimburse Seller for same.

23. INCIDENTAL LOSSES All loss or damage from any cause to the materials, tools, equipment, work or workmen of the Seller or its agents or subcontractors while in or about the premises of the Purchaser shall be borne and paid for by the Purchaser, except in the event that such loss or damage results from the sole negligence of Seller.

24. INDEMNIFICATION To the fullest extent permitted by law, PURCHASER SHALL INDEMNIFY, DEFEND, AND HOLD SELLER AND SELLER'S AGENTS AND EMPLOYEES HARMLESS FROM AND AGAINST ANY AND ALL ACTUAL OR ALLEGED

CLAIMS, FINES, PENALTIES, LIENS, CAUSES OF ACTION, SUITS, DEMANDS, DAMAGES, LIABILITIES, LOSSES, COSTS AND EXPENSES, INCLUDING, BUT NOT LIMITED TO, ATTORNEYS' FEES, THAT ARISE FROM, RELATE TO, OR OTHERWISE ARE CONNECTED WITH, IN WHOLE OR IN PART, EITHER PARTY'S PERFORMANCE OF THIS CONTRACT, INCLUDING THE ACTS OR OMISSIONS OF EITHER PARTY'S SUPPLIERS, SUBCONTRACTORS, EMPLOYEES, AGENTS AND/OR REPRESENTATIVES, WHETHER OR NOT SUCH CLAIMS ARE BASED UPON CONTRACT, WARRANTY, TORT (INCLUDING BUT NOT LIMITED TO ACTIVE OR PASSIVE NEGLIGENCE), STRICT LIABILITY OR OTHERWISE. Seller reserves the right to select counsel to represent it in any such action.

25. DEFAULT In case of any default by Purchaser, Seller may declare the Contract price or all unpaid installments thereof to be immediately due and payable (whether or not said work shall have been completed) or may enter Purchaser's premises and remove all or any portion of materials provided by Seller. All such remedies of Seller are cumulative and not exclusive. Seller shall also have the right to terminate the Contract due to Purchaser's default, effective at the time notice of termination is received by Purchaser. Default by Purchaser shall consist of failure to pay any installment of price when due, no demand being necessary, or any act or omission on the part of Purchaser whereby Seller is prevented from completing said services, or receivership, bankruptcy, assignment for the benefit of creditors or any other form of insolvency proceedings by or against Purchaser or in case said premises or said system shall be attached, lien or seized by process of law and such attachment or lien shall not be vacated or seizure terminated with ten (10) days after its occurrence.

26. SPECIAL CONDITIONS In the event new equipment is carried into existing equipment, the Seller will only test in high pressure the new work involved and any high-pressure test required on the old work will be an extra to the Contract price. Purchaser assumes full responsibility for the condition of existing equipment and for water or other damage resulting directly or indirectly from such condition or other application of test or flushing pressures. In the event existing equipment is being repaired, Seller does not assume any responsibility for testing old and new piping, and any testing will be an extra cost to the Contract price, which will include costs of labor and materials required to make the system tight at high pressure. Purchaser assumes full responsibility for the condition of existing equipment, and for water or other damage resulting directly or indirectly from such condition or the application of test or flushing pressures. In the event a sprinkler system is converted from a wet system to a dry system, the Seller is not responsible for the costs to repair the existing wet pipe system to make it tight at the required air pressure. Nor is the Seller responsible for the cost of material necessary to re-arrange the lines to insure proper drainage thereof. Any labor or material necessary to make the system tight under air pressure or to change the drainage on lines will be an extra cost to the Contract price. Seller acknowledges that Seller is responsible for ensuring that water-based sprinkler piping is adequately heated to prevent freezing and that all drum drips are required to be maintained and drained by Purchaser.

27. HAZARDOUS CONDITIONS Purchaser represents to the best of Purchaser's knowledge that no hazardous conditions such as risk of infectious disease, MIC, need for air monitoring, respiratory protection, or other medical risk, asbestos, asbestos containing material or other potentially toxic or otherwise hazardous material are contained in or on the surface of the floors, walls, ceiling, insulation or other structural components of the area of any building where work is required to be performed under this Contract. If hazardous conditions are encountered by Seller during the course of Seller's work, Seller shall have no obligation to further perform in the area where the hazardous conditions exist until the area has been made safe by Purchaser as certified in writing by an independent testing agency, and Purchaser shall pay disruption and re-mobilization expenses as determined by the Seller. All hazardous materials shall at all times remain the responsibility and property of Purchaser. Seller shall not be responsible for the testing, removal, or disposal of such hazardous materials.

28. WASTE MANAGEMENT If the work calls for the disposal of hazardous and/or non-hazardous waste materials ("Waste"), then Purchaser

shall: (a) be responsible for providing to Seller all necessary forms, waste profile sheets, laboratory analyses, samples, and other information pertaining to the types of Waste to be disposed and shall ensure that all Waste-related information furnished to Seller is accurate and complete; (b) secure, at its expense, all approvals, permits and other authorizations necessary to enable Seller to perform such Waste disposal services, except for those permits and licenses required to be obtained by Seller in connection with its own business; and (c) without limiting the foregoing, comply with all applicable laws and regulations in connection with such classification and disposal of Waste. Purchaser shall execute all manifests for the transportation, storage and disposal of any Waste removed from the project site. At no time will Seller take title to any Waste located on or removed from the project site, and such Waste shall be transported and disposed of as directed by Purchaser and in conformity with all applicable laws and regulations. Nothing in this Contract shall be construed or interpreted as requiring Seller to assume the status of, and Purchaser acknowledges that Seller does not act in the capacity nor assume responsibilities of, Purchaser or others as a 'generator,' 'operator,' 'transporter' or 'arranger' in the treatment, storage, disposal or transportation of any hazardous substance or waste as those terms are understood within the meaning of RCRA, CERCLA, or any other similar federal, state or local law, regulation or ordinance. Purchaser acknowledges that Seller has played no part in and assumes no responsibility for generation or creation of any Waste that may be the subject matter of this Contract. Consistent with Purchaser's obligations under the INDEMNIFICATION provision at Section 24 of this Contract, Purchaser shall defend, indemnify and hold Seller harmless from and against any and all demands, claims, liabilities (including strict liabilities), losses, costs, expenses (including attorneys' fees), fines, penalties, forfeitures, liens, and damages (collectively, "Losses") that result from the transport, storage and/or disposal of Waste generated on and/or removed from the project site, WHETHER OR NOT SUCH CLAIMS ARE BASED UPON CONTRACT, WARRANTY, TORT (INCLUDING BUT NOT LIMITED TO ACTIVE OR PASSIVE NEGLIGENCE), STRICT LIABILITY OR OTHERWISE. Purchaser shall be responsible for purchasing and maintaining its own liability insurance from financially sound insurance companies, including but not limited to environmental liability and pollution coverage.

29. OSHA COMPLIANCE Purchaser shall indemnify, defend, and hold Seller harmless from and against any and all claims, demands, and damages arising in whole or in part from the enforcement of OSHA (and any amendments or changes thereto) unless said claims, demands or damages are a direct result of causes within the exclusive control of Seller.

30. LIEN LAWS (WISCONSIN ONLY) AS REQUIRED BY THE WISCONSIN CONSTRUCTION LIEN LAW, CLAIMANT HEREBY NOTIFIES OWNER THAT PERSONS OR COMPANIES PERFORMING, FURNISHING OR PROCURING LABOR, SERVICES, MATERIAL, PLANS, OR SPECIFICATIONS FOR THE CONSTRUCTION ON OWNER'S LAND MAY HAVE LIEN RIGHTS ON OWNER'S LAND AND BUILDINGS IF NOT PAID. THOSE ENTITLED TO LIEN RIGHTS, IN ADDITION TO THE CLAIMANT, ARE THOSE WHO CONTRACT DIRECTLY WITH THE OWNER OR THOSE WHO GIVE THE OWNER NOTICE WITHIN SIXTY (60) DAYS AFTER THEY FIRST PERFORM, FURNISH, OR PROCURE LABOR, SERVICES, MATERIALS, PLANS OR SPECIFICATIONS FOR THE CONSTRUCTION. ACCORDINGLY, OWNER PROBABLY WILL RECEIVE NOTICES FROM THOSE WHO PERFORM, FURNISH, OR PROCURE LABOR, SERVICES, MATERIALS, PLANS, OR SPECIFICATIONS FOR THE CONSTRUCTION, AND SHOULD GIVE A COPY OF EACH NOTICE RECEIVED TO THE MORTGAGE LENDER, IF ANY. CLAIMANT AGREES TO COOPERATE WITH THE OWNER AND THE OWNER'S LENDER, IF ANY, TO SEE THAT ALL POTENTIAL LIEN CLAIMANTS ARE DULY PAID.

31. NO THIRD PARTY BENEFICIARIES. There are no third-party beneficiaries of this Contract and nothing in this Contract, express or implied, is intended to confer on any person other than the parties hereto (and their respective successors, heirs and permitted assigns), any rights, remedies, obligations or liabilities.

LAST UPDATE: 3/20/24



Milwaukee:
11217 West Becher Street
West Allis, WI 53227-1032
Phone: 414.476.5790
Fax: 414.476.0916

Madison:
4701 Tradewinds Parkway
Madison, WI 53718-6917
Phone: 608.222.9196
Fax: 608.222.3339

Green Bay:
2247 Fox Heights Lane, Suite A
Green Bay, WI 54304
Phone: 920.278.4550

www.ikmbuildingsolutions.com

July 10, 2025

Ms. Minetta Lippert
Dwight Foster Public Library
209 Merchants Ave
Fort Atkinson, WI 53538
minetta@fortlibrary.org

Re: Condenser Replacement

Dear Ms. Minetta:

We are pleased to provide our proposal for the above-referenced project. We include the following:

Condenser Replacement:

- Isolate the condenser from the system
- Removal and disposal of the existing Trane condenser
- Installation of a new Trane condenser
- Installation of new R410A refrigerant for the new condenser
- Flush existing line sets to clean out old refrigerant
- Miscellaneous materials and labor for the installation
- Crane for removal and installation of the condenser included
- Place equipment into operation

Our price for this work is **\$89,642.00**

This condenser is an exact match for the existing one and in stock at this time. If this R410A condenser goes out of stock you will be forced to go with R454B which will increase the price and lead time.

Not included in the above proposal:

- Applicable state and local sales tax
- Any tasks not mentioned above

This proposal is based on work being performed during normal working hours unless otherwise noted above. Normal working hours are between 7:00 a.m. and 4:00 p.m., Monday through Friday.

This proposal is conditioned on IKM Building Solutions confirming the price, delivery time, and availability of goods with IKM Building Solutions subcontractors, vendors, and suppliers at the time when IKM Building Solutions and customer are ready to enter a final contract for the proposed work. IKM Building Solutions reserves the right to (i) adjust the proposal price and schedule in the final contract if needed due to such confirmation, and (ii) condition the final contract on, and include in it, any reservations, and/or limitations that IKM Building Solutions must accept from its subcontractors, vendors, and suppliers to obtain any goods.

To the extent this quotation/proposal includes materials, products, and/or equipment that are manufactured, produced, assembled in, or otherwise originate from, a country other than the United States, the price set forth herein for such items is guaranteed for a period of 15 days from the date of this quotation/proposal. After such time, IKM Building Solutions, Inc. reserves the right to increase the price set forth herein for such items when the parties enter a contract for the work or when IKM Building Solutions, Inc. actually orders such items, whichever the later, to reflect the then-current price of such items, as such pricing may be affected by market conditions including, but not limited to, tariffs, quotas, and/or duties. The parties agree that the pricing for such items in this quotation/proposal is guaranteed only for such time, and customer assumes the risk of any such price increases for such items after such time. If customer fails to sign this quotation/proposal within 15 days from the date of this quotation/proposal, this quotation/proposal shall be deemed void, withdrawn, and canceled.

We thank you for the opportunity to provide you with this proposal and look forward to working with you on this project. Should you have any questions, please do not hesitate to contact us.

Sincerely,

Brian Baker

Brian Baker
Inside Sales Representative
IKM Building Solutions, Inc.
Direct: (608) 977-4070
BBaker@IKMBuildingSolutions.com

BB/lc

This Proposal Accepted By:

(Signature)

(Date)

(P.O. Number)



Heating & Cooling, Inc.

87 W. Beltline Hwy. • Madison, WI 53713
(608) 255-6902 • Fax (608) 255-2001

August 1, 2025

Fort Atkinson Library
Contact: Minetta Lippert
Library Director
209 Merchants Ave.
Fort Atkinson, WI 53538
Phone: 920-563-7790
Email: minetta@fortlibrary.org

Project Description: Replace (1) Trane 60 Ton A/C Unit.
Project Address: 209 Merchants Ave. – Fort Atkinson, WI

Install new split a/c unit:

- Remove & properly dispose of existing equipment & refrigerant.
- Install (1) new Trane RAUJC60EB 60 Ton 200V 3-Phase Air Cooled Condensing Unit R410a Freon.
 - Non-fused disconnect.
 - Spring Isolators.
 - Standard Ambient Control.
- Install onto existing roof rails.
- Reconnect dual circuit refrigeration piping to new unit.
- Reconnect Line/Low voltage.
- Remove and reconnect existing Ivu controls for a/c unit and test.
- Startup and verify proper operation of the units.
- Installation labor & Trane factory startup.
- Crane rental, street closure permit & city permits.
- One-year parts and labor warranty
- Manufacturer's warranty

Total Investment - \$ 104,676.00

Note: Current lead time on unit – 7-9 Week plus shipping to Harker.

Terms & Conditions:

- Credit Card payments will be charged additional 3.5% transaction fee on top of pricing above.
- This price does **NOT** include:
 - Roofing.
- Work to be performed during normal business hours of Monday-Friday 7:30am to 4:00pm
- The pricing provided is valid for 30 Days.
- Terms are net 30 days.
 - After which finance charges will be applied.
- If payment is not received, Harker reserves the right to suspend all warranties.
- According to the state of Wisconsin statutes, chapter 779.01 we retain the right to file a lien if payment is not received as noted above.
- This price reflects the Harker cash or check discount & maintenance agreement discounts.

Authorization Signature

Date



Heating & Cooling, Inc.

87 W. Beltline Hwy. • Madison, WI 53713
(608) 255-6902 • Fax (608) 255-2001

Sincerely,

Jason Rowland

Jason Rowland

Project Manager

jasonr@harkerheating.com

C# 608-590-6142



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Minetta Lippert, Library Director

RE: Review and possible action relating to the library's 2025 CIP furniture replacement project (Lippert, Library Director)

BACKGROUND

The City of Fort Atkinson's 2025 Capital Improvement Plan included \$7,000 to replace furniture in the library. The Dwight Foster Public Library Board of Trustees and Fort Atkinson City Council approved the 2025 Capital Improvement Plan. The Library Board agreed to reimburse library CIP costs with funds from the library's trust held with Edward Jones.

Library staff identified the teen room as the area most in need of furniture updates. Current teen room furniture is significantly stained but still sees lots of usage.

DISCUSSION

Library staff requested furniture replacement quotes from CJ & Associates from New Berlin and BSI from Waukesha. Library staff also initiated conversations with Library Furniture International and Demco, but library staff did not ultimately seek proposals from these companies. (Note that DFPL received a proposal from Demco in 2020 that included teen room furniture.) Youth Services Librarian Daphne Sieren previously worked with CJ & Associates for a furniture project at the Greenfield Public Library.

Option 1: CJ & Associates

Cost Estimate: \$11,241.54

Notes: CJ & Associate's estimate includes reupholstery work on the library's four booth benches and three lounge chairs plus six new stools. CJ & Associates would transport the booths and chairs to and from the upholsterer. Further, CJ & Associates recommended moving the four booth benches against the wall in a different layout. Library staff are very excited about the new layout idea and have kept the furniture in the new configuration. The proposed layout offers good sight lines for staff to monitor the room while also increasing the number of seats in the room without making the room feel crowded.

Option 2: BSI

Cost Estimate: \$14,370.60

Notes: BSI's estimate includes two booth benches, four square tables, four plastic side chairs, and four rocker lounge chairs. Library staff and BSI came up with the idea of moving the booth benches against the walls and using chairs on the opposite side in order to provide better sight lines in the room and bring down costs.

FINANCIAL ANALYSIS

Library staff originally underestimated the cost of furniture and flooring replacement as they created the 2025 CIP. The library's 2025 Capital Improvement Plan budgeted \$7,000 to replace furniture in the library and \$4,000 to replace flooring. Now that there is more information about the costs of replacing furniture and flooring, library staff recommend combining those planned totals in order to dedicate \$11,000 to furniture replacement in 2025. Library staff no longer wish to replace flooring in 2025.

CJ & Associates' proposal is \$241.54 higher than \$11,000. However, other planned 2025 CIP projects have come in under budget.

2025 CIP Projects	Budget	Actual or Projected Cost
Computer Replacement	\$5,000	\$2,423
Server Replacement	\$14,000	\$10,635
Furniture/Flooring Replacement	\$11,000	\$11,242
Total =	\$30,000	\$24,300

Wis. Stat. § 43.58(1) states, "The library board shall have exclusive control of the expenditure of all moneys collected, donated, or appropriated for the library fund." In general practice, this means that once revenues (levied by the City, donated, or allocated by the County) are put into the library fund, the Library Board has exclusive control over the associated expenditures. The City's Financial Stability Guidelines indicate that purchases over a certain threshold must be approved by the City Council. While library expenditures are generally outside the purview of the City Council, staff is bringing this proposal to City Council for review in order to follow the City's financial policy.

On Monday, August 11, 2025, the Library Board approved the teen room furniture replacement project with CJ & Associates and to reimburse this cost with funds from the library's trust.

RECOMMENDATION

Library staff recommend the City Council approve working with CJ & Associates to update the library's teen room furniture at a cost not to exceed \$11,241.54 with funding from the library's trust at Edward Jones.

ATTACHMENTS

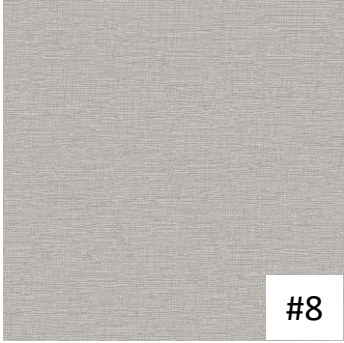
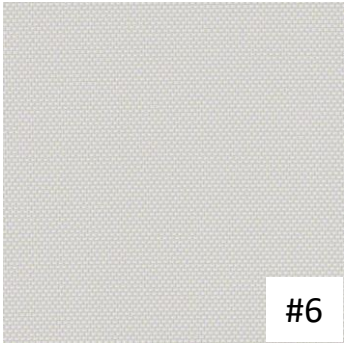
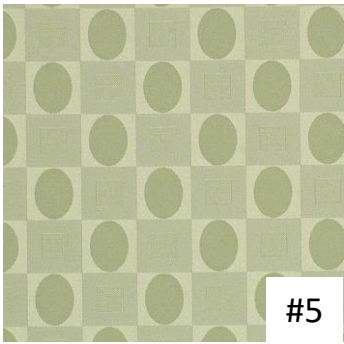
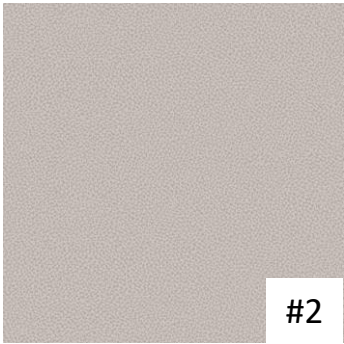
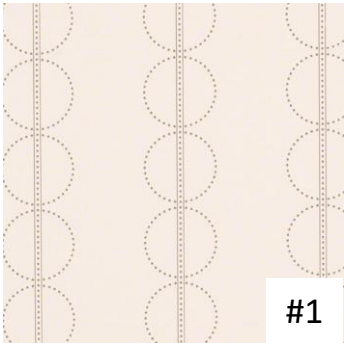
1. CJ&Associates 25408_Teen Space Presentation
2. CJ&Associates 25408 _ Teen Space Proposal_073125
3. BSI 133633_Teen Area Concept_070825

4. BSI 133633_Teen Area Proposal_071025

Bench Seating



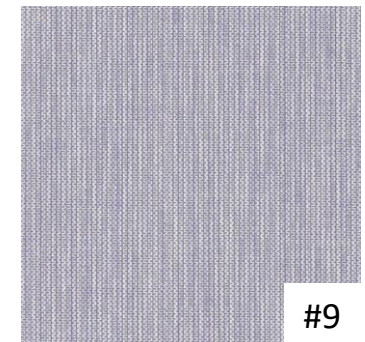
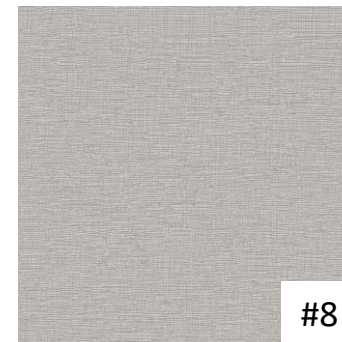
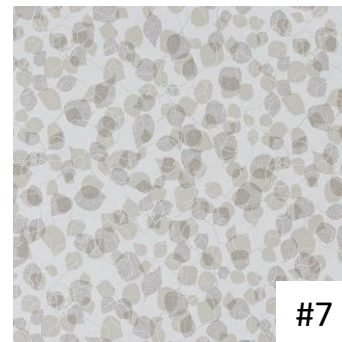
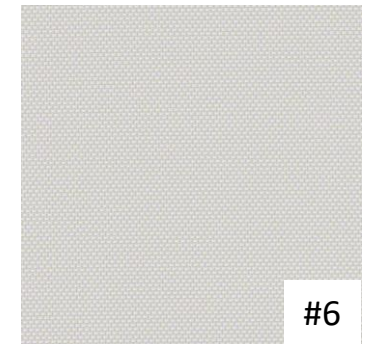
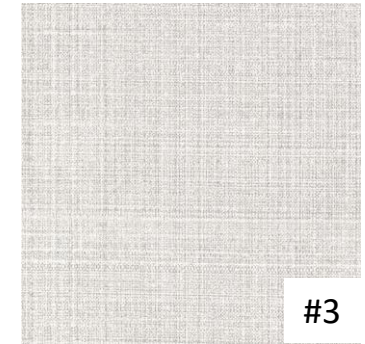
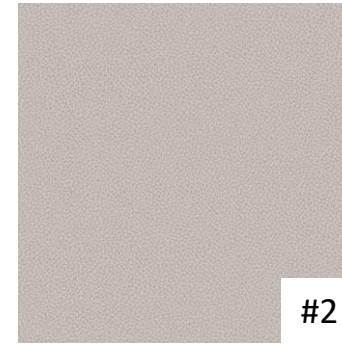
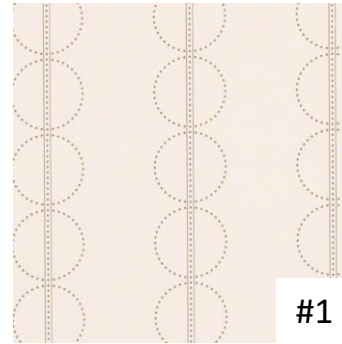
Thoughts: Using a neutral pattern on back and using a solid vinyl on the seat of the bench seating



Lounge Seating



Thoughts: Using a neutral solid on Back and Arms of chair and using a simple pattern design for the removeable seat



Stool Seating



OPTION #1
Teknion - Collaborative Ottomans

Quantity	6
Details	Vinyl Fabric TBD on Casters
Options	Size: 18" Dia. Or 24" Dia.
Pricing	\$520.80 / per stool (Priced at a Grade 3)

The Collaborative Ottoman provides casual seating for lounge environments or workstation applications. Exhibiting a playful and fun design, the ottoman can be upholstered in classic monotone or dual-upholstered with a different finish on the seat surface.

Stool Seating



OPTION #2

Global - Rambler

Quantity	6
Details	Vinyl Fabric TBD on Casters
Options	Size: 22" , 26", or 39"
Pricing	\$490.09 / per stool (Priced at a Grade 3)



Rambler™ is a playful series of ottomans designed for collaborative and community spaces in workplace, education and select healthcare environments. Rambler creates lively, relaxed layouts with a variety of shapes and sizes in two seat heights.

Rambler offers several geometric shapes in different sizes that come together easily to provide a mix of casual and lively configurations. Tops and sides can be specified separately in your choice of fabric, vinyl or leather. Optional moisture barrier supports advanced cleaning protocols.

Pricing

**click on images below for more details on the product.*

CJ Labor Cost		\$1,455.00
Reupholstery of Benches	<i>\$346.50/Bench</i>	\$1,386.00
Reupholstery of Chairs	<i>\$308.00/Chair</i>	\$924.00
Vinyl Cost		\$4,536.00
Stool Option 1 (Qty 6)		\$3,246.80
Stool Option 2 (Qty 6)		\$2,940.54
<u>Overall Cost w/ Option 1 Stools</u>		<u>\$11,547.80</u>
<u>Overall Cost w/ Option 2 Stools</u>		<u>\$11,241.54</u>



Proposal for:

Dwight Foster Public Library
209 Merchants Ave.
Fort Atkinson WI 53538

Project Location:

Dwight Foster Public Library
209 Merchants Ave.
Fort Atkinson WI 53538

25408 Dwight Foster Public Library - Teen Space

CJ & Associates, Inc. is pleased to present this proposal for the above referenced project. Our proposal is offered with and governed by the enclosed terms.

Good Afternoon,
Megan and I are pleased to provide the following proposal that shows the reupholstery work as well as the new, mobile stool/ottomans for use in the Teen Space. Our proposal covers all product and labor services necessary to have the existing furniture items recovered as well as options for a couple of different stool/ottomans that can be incorporated into the design.
Thank you for this opportunity to be of service. Should any questions arise, please feel free to reach out at your convenience.

We're looking forward to enhancing this space for you and the Teens who use it :-).

Mfg.	Qty.	Product	Sell	Ext Sell
Labor Charges				
CJA	1	CJ Labor to include: day 1 drive to pick up 2 couches and 1 chair to drop at JT. day 2 pick up @ JT and swap at site for 2 couches and 2 chairs, then take to JT. day 3 pick up @ JT and deliver to site	\$1,455.00	\$1,455.00

Subtotal: \$1,455.00

Subtotal: Labor Charges \$1,455.00

	Mfg.	Qty.	Product	Sell	Ext Sell
Reupholstery Labor					
	JTU	4	Reupholster Existing Benches	\$346.50	\$1,386.00
	JTU	3	Reupholster Existing Lounge Chairs	\$308.00	\$924.00
Subtotal:					\$2,310.00
Subtotal: Reupholstery Labor					\$2,310.00
Stools Option 1					
	TSC	6	NCORSLS	\$520.80	\$3,124.80
			Collaborative Ottoman - Round (Single Upholstery), Small 18"Dia., Lounge 18-1/2"h, Single Upholstery		
			Ottoman Base Uph Finishes	~F03	Fabric Grade 3
			Seating Fabric Grade 3	~14	Fine Grain
			Fine Grain, Seating Fabric	F414	Matcha Leaves
			Casters/Glides	~	Casters (Hard)
Subtotal:					\$3,124.80
Subtotal: Stools Option 1					\$3,124.80
Stools Option 2					
	GUS	6	RA2222SQ	\$490.09	\$2,940.54
			RAMBLER, 22"d x 22"w x 17.50"h, Square Ottoman, GLOBAL SEATING USA		
			Top Textile {10 10}	~03	Grade 03
			Grade 03 Textile {GR}	?	----- UNSELECTED -----
			Graded In Grade 03 Textile {FR}	GPM3	1-Graded In Grade 03 Fabrics
			Side Textile {10 01}	~03	Grade 03
			Grade 03 Textile {GR}	?	----- UNSELECTED -----
			Graded In Grade 03 Textile - {FR}	GPM3	2-Graded In Grade 03 Fabrics
			Base Type {49}	CST	B-Casters with 17.5" Seat Height
			Caster Type {60}	C112	C-2.5" Black Caster for Carpeted Surfaces
			Moisture Barrier {70}	NB	M-No Moisture Barrier

Subtotal:**\$2,940.54****Subtotal: Stools Option 2****\$2,940.54****Vinyl Cost**

56

\$77.00

\$4,312.00

COM Yardage - Vinyl TBD (Budget Subject to Change Based on Vinyl
Slection)**Subtotal:****\$4,312.00****Subtotal: Vinyl Cost****\$4,312.00****COM Freight**
Estimated Teknion Surcharge

\$224.00

\$122.00

This Proposal is valid for 30 days.**Delivery and installation is included in this proposal except as noted, and will take place during normal business hours unless described otherwise. Freight is estimated and is subject to change.****Any applicable tariff-related charges will be added at the time of invoicing.**

Payment Terms

1. Payment terms are 50% deposit due with order, net 30 days after project completion. Hold back/retainage allowed up to value of any open punchlist items.
2. A monthly service charge of 1.5% (18% per annum) will be charged on all past due account balances.
3. Credit card purchases are subject to a 5% processing fee.
4. All applicable taxes will be added at time of invoicing. Buyer will not be considered tax exempt without providing CJ & Associates, Inc. (CJA) with the appropriate resale or tax exempt certificates.
5. Upon request, the buyer agrees to submit CJA any credit information requested in order to properly approve this order.
6. Warehousing for product is complimentary for 30 days beyond the agreed to scheduled installation date. After that, a monthly rate of \$0.75 per square foot will be charged.
7. Unless otherwise stated in the sale proposal, buyer will be charged for common carrier freight charges and manufacturer surcharges.

Please sign & date for order approval.

Company Name

Customer Name

Date

We look forward to working with you on this project.
Please let me know if you have any questions or if I can be of further assistance.

Sincerely,
CJ & Associates, Inc.



Roberta Montague
Director of New Business Development



CJ & Associates, Inc.
16915 W. Victor Road
New Berlin, WI 53151

Standard Terms and Condition of Sale

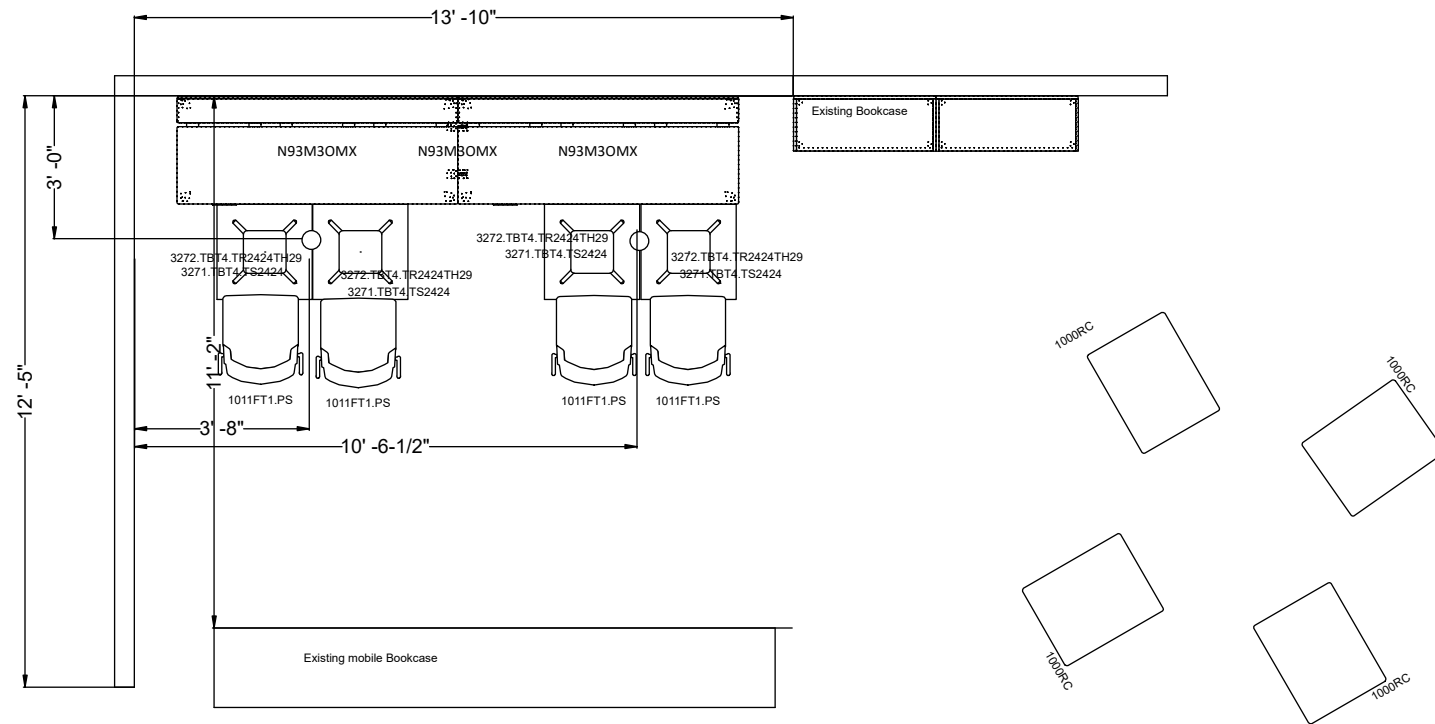
1. The proposal & drawing set must be approved, signed and dated by the client before order placement.
Any changes will be handled via an approved change order.
2. All proposed work will require the prior approval of the property owner, if applicable.
3. Installation is based on having the area free and clear, having adequate staging area and unimpeded access to the buildings elevator and dock.
4. Moving of existing furniture or electronics is not included, unless otherwise noted.
5. Project schedules will be based on manufacturer standard lead times for materials.
6. On direct shipments, not including installation, the Customer will receive and install. It will be the Customer's responsibility to inspect the merchandise and file freight claims. CJA cannot be held liable for cost of repairs and/or replacement of damaged goods.
7. This order may not be cancelled, unless agreed to in writing by management of CJA.
8. Terms inconsistent with those stated herein, which appear on purchaser's formal order, will not be binding to CJA.
9. This proposal is covered by CJ & Associates, Inc. Furniture Warranty.

Dwight Foster Public Library

07/08/25

Teen Area

133633



- A 2- 3 seat fringe benches w/ Cleanout and power in 1 location (budget gr. 6)
- B 4- 24"x24" sq. tables
- C 4- plastic side chairs
- D 4- rocker lounge chairs (budget gr. 6)

7/8/2025 7:35:18 AM

p:\Dwight Foster Public Library\133633_Teen Department Furniture\Drawings\A1\133633-A-RP-01.cmdrw

All the information contained in these documents is considered to be confidential & proprietary. All concepts, Designs & Documentations Either schematic or definitive, are protected by U.S. Copyright Laws, & as such, may not be Reproduced, Distributed, Transmitted, Modified, Displayed or Sold without the written consent of Building Service Inc.

133633- DFPL- Teen Area- 7-10-25

7/10/2025

BSI Account Representative:
Kate Venturini
kventurini@buildingservice.com
262-705-5638



Building Service, Inc.
Waukesha | Madison | Appleton
www.buildingservice.com
262.955.6400

Line #

tag: teen area

					<u>EACH</u>	<u>TOTAL</u>
<u>1</u>	1000RC	Soft Sway Rocking Chair - Large	QTY	4	\$1,050.85	\$4,203.40
		SOFT SWAY ROC Size				
		1 Large				
		Standard Uphols Upholstery Type				
		Woven Fabric Woven Fabric				
		Grade 6 Grade 6				
		V0109194205 Chromatic Spring				

					<u>EACH</u>	<u>TOTAL</u>
<u>2</u>	N93GB2	FRINGE,GANGING CONNECTOR BRACKET,SET OF 2	QTY	1	\$44.55	\$44.55
		CDA #30010113				



					<u>EACH</u>	<u>TOTAL</u>
<u>3</u>	N93M3OMX	FRINGE,MID BACK,3 SEAT,CLEAN-OUT,ARMLESS,CONTRAST	QTY	2	\$2,924.10	\$5,848.20
		BACK UPHOLSTERY GRADE 6 GRADE 6				

Line #

BACK UPHOLSTERY PATTERN COLOR	...	Skipped Option
LUMBAR UPHOLSTERY GRADE	6	GRADE 6
LUMBAR UPHOLSTERY PATTERN COLOR	...	Skipped Option
EXTREME BACK UPH GRADE	6	GRADE 6
EXTREME BACK UPH PATTERN COLOR	...	Skipped Option
SEAT UPHOLSTERY GRADE	6	GRADE 6
SEAT UPHOLSTERY PATTERN COLOR	...	Skipped Option
FRONT SEAT GROMMET	G23SR	POWER GROMMET,SILVER,RIGHT
LEG MATERIAL/FINISH	501	METAL LEG,PLATINUM METALLIC
GLIDE	STD	STANDARD GLIDE
		CDA #30010113

					<u>EACH</u>	<u>TOTAL</u>
4	1011FT1.PS	Lumin, Four-Leg Chair, Plastic Seat & Back, Armless	QTY	4	\$166.00	\$664.00
	Frame Information	FC2		Silver Frame		
	Caster/Glide Option Selection	GL1		Standard Multi-Surface Glide		
	Tablet Option Selection	~		No Tablet Upgrade		
	Plastic Shell Color Selection	SC24		Apple		
	3 Fire Std Option for Plastic Selection	~		No Selection		
	Packaging Options	~		Std Packaging		

					<u>EACH</u>	<u>TOTAL</u>
5	3271.TBT4.TS2424	Parallon Tabletop, X-Base, 24" Square	QTY	4	\$229.50	\$918.00
	Laminate Grade Selection	GR2		Grade 2 Laminate		
	Grade 2 Laminate Finishes	TL14		Uptown Walnut		
	Edge Profile	TE5		Flat Edge		

Line #

						<u>EACH</u>	<u>TOTAL</u>
6	3272.TBT4.TR2424TH 29	Parallon Base, X-Base, For 24" Round Tabletop, 29" Height	QTY	4		\$196.00	\$784.00
	Base Finish Selection	BF03 Black					
	Foot Style Option	LS18 Fixed / Glides					

Subtotal: \$12,462.15

XX- FREIGHT

						<u>EACH</u>	<u>TOTAL</u>
7	TARIFF-MFG	Tariff from Manufacturer	QTY	1		\$458.45	\$458.45
		SOI					
		KIMBALL					

						<u>EACH</u>	<u>TOTAL</u>
8	FREIGHT	Mfg.Freight	QTY	1		\$0.00	\$0.00
		MOORECO- current freight promo until 12/31/25					

Subtotal: \$458.45

XX-INSTALL

						<u>EACH</u>	<u>TOTAL</u>
--	--	--	--	--	--	-------------	--------------

Line #					
9	INSTALLATION	Installation Services	QTY	1	\$1,450.00 \$1,450.00
				Subtotal:	\$1,450.00
				Grand Total:	\$14,370.60



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action relating to a 5-year contract with Associated Appraisal for Full-Value Assessment Services. (Ebbert, Clerk/Treasurer/Finance Director)

BACKGROUND

Wisconsin Statute 70.05 governs the assessment of general property for taxation across towns, cities, and villages in the state. To maintain equity, each taxation district must assess property at full value at least once every five years. Municipalities must notify the public of upcoming revaluations through their website or public postings. The Department of Revenue annually determines the ratio between assessed and full property values for each district and monitors compliance. If a district fails to keep property assessments within 10% of full value for any major class of property over a four-year span, the department issues a warning. Continued noncompliance in subsequent years leads to mandatory special supervision of the district's assessments in the third year after the initial period of failure.

DISCUSSION

The City's contracted assessor, Associated Appraisal, conducted an Interim Market Update (IMU) in 2023 following the 3rd consecutive year of assessment level non-compliance. An IMU is advantageous when a full inspection or exterior-only revaluation has been completed within the last several years. The city last experienced a full revaluation in 2017. Conducting the IMU avoided the City reaching non-compliance for a 4th year. Should a 5th year of non-compliance be reached, the Wisconsin Department of Revenue will order a state supervised revaluation for the next assessment year, at the cost to the municipality.

The table below outlines the City's assessment ratio (level) since 2019. The City's assessment ratio in 2025 is 83.24% of equalized value, which makes the City non-compliant with state statutes.

Table 1 Assessment Type, Level and Compliance (2019-2025)

Assessment Type, Level and Compliance							
	2019	2020	2021	2022	2023	2024	2025
Type	Maintenance	Maintenance	Maintenance	Maintenance	Interim Market Update	Maintenance	Maintenance
Level	93.37%	89.16%	84.20%	73.74%	97.55%	91.47%	83.24%
Compliant	Compliant	Non-Compliant	Non-Compliant	Non-Compliant	Compliant	Compliant	Non-Compliant

The City of Fort Atkinson Board of Review was conducted on June 19th for the 2025 assessment year. At this time, the BOR and staff learned the assessment level would fall out of compliance this year.

The City has had simple maintenance contracts for assessment services for many years with Associated Appraisal. Full Value Maintenance is a proactive approach that offers an alternative to traditional valuation methods. Annual full value maintenance assessment services ensure the municipalities' assessments remain in compliance with Wis Stats. 70.05(5) throughout the contract term. The level of assessment will be maintained within 100% of the prior year's equalized value for all major property classes. No additional onsite inspections will be conducted beyond those performed during routine annual maintenance.

Associated Appraisal has offered a new five-year contract for Full Value Maintenance assessment services, which means that the City would remain in compliance with statutes relating to assessment ratio for the next five years. The City is currently in year 4 of a five-year contract with Associated for maintenance services only at a cost of \$35,000 per year. The new contract cost is \$63,000 per year for 2026-2030. The new contract would supersede the current contract.

Contract Inclusions:

Assessment Notices: Per Wis. Stats., 70.365, notices are mailed per tax parcel for any value changes from the previous year.

Open Book: Assessors shall hold open book for property owners to discuss their values. Open book can be scheduled in person or via phone.

Board of Review: Assessor shall attend and participate in BOR at a mutually agreed upon schedule.

FINANCIAL ANALYSIS

The annual cost of \$63,000 was negotiated between staff and Mark Brown with Associated Appraisal. The General Fund, Contracted Services - Assessor account is utilized to cover the expense of the contract, and, if approved by the City Council, staff will include the appropriate amount in the 2026 budget.

Using full value maintenance for the next five years will allow the City to avoid a full revaluation, exterior revaluation, or interim market update during the term. Note that the costs

associated with assessment services have increased substantially over the past three years with market and labor changes. An interim market update would cost about \$50,000 in addition to annual maintenance costs. An exterior revaluation would be \$205,000 in addition to maintenance costs; and a full revaluation would round about \$240,000 plus maintenance. Staff believes that full value maintenance is a valuable alternative to these options. Note that a full revaluation will likely be recommended or even required in 2031.

RECOMMENDATION

Staff recommends the City Council authorize the City Manager to execute the 5-year contract with Associated Appraisal for full-value assessment services not to exceed \$63,000 per year for assessment years 2026-2030.

ATTACHMENTS

1. The Assessment Cycle
2. AAC 2026-2030 Full Value Maintenance Contract

ANNUAL ASSESSOR REQUIREMENTS BY ASSESSMENT TYPE

	Full Revaluations	Exterior Revaluation	Interim Market Update	Annual Review/Maintenance
Appropriate when	PRC is outdated or inaccurate, <u>or</u> assessment uniformity is poor <u>or</u> full revaluation hasn't been done in 10 years <u>or</u> assessment uniformity is poor <u>or</u> reassessment is required per statute 70.75.	Most PRC information can be verified by exterior inspection <u>and</u> full revaluation completed within past 6-9 years	PRC is deemed reliable <u>and</u> full revaluation completed within past 5 years <u>and</u> assessment level shows unacceptable degree of variance in some neighborhoods or classes	PRC is deemed reliable <u>and</u> revaluation was completed within past 5 years <u>and</u> assessment level during previous assessment year is within acceptable parameters
Real Property affected	All Property	All Property	Changes identified in column D PLUS Analysis of problem strata Identified from previous assessment year	Annexed properties Change in exemption status Demolitions & fire damage New construction Change in classification Parcels with ongoing construction Change in legal description Change in zoning
Land Study	On-site Inspection	On-site Inspection	As necessary	As necessary
Inspect Exterior	All Buildings	All Buildings If no changes, may use digital imaging technology to supplement field re-inspections with a computer-assisted office review.	Buildings w/changes	Buildings w/changes
Inspect Interior	All Buildings	Buildings w/changes	Buildings w/changes	Buildings w/changes
Building Measurements	Measure all buildings	Measure or verify as needed	Measure or verify as needed	Measure or verify as needed
Photos	All primary buildings	As necessary	As necessary	As necessary
Sketch	All primary buildings	As necessary	As necessary	As necessary
Analyze neighborhoods, property types, trends	Required	Required	Required. Results determine whether assessment is full value or aggregate assessment level	Optional
Property Record Card (PRC)	Create new	Update/create new as needed	Update/create new as needed	Update/create new as needed
Review classifications	Required	Required	Required	Required
Validate usability of sales	Required	Required	Required	Required
Verify sales attributes (Ch 7 and 9)	Required	Required	Required	Required
Parcels to be valued	All Parcels	All Parcels	Parcels with changes	Parcels with changes
Review / revalue properties	All Parcels	All Parcels	Parcels with changes	Parcels with changes
Assessment level	Full Value	Full Value	Aggregate assessment level or full value as appropriate	Aggregate Assessment
Mail Notice of Change in Asmt	Only if assessment changes	Only if assessment changes	Only if assessment changes	Only if assessment changes
Personal property assessment	Required	Required	Required	Required
Add omitted property to roll (70.44)	Required	Required	Required	Required
Correct errors in roll (70.43)	Required	Required	Required	Required
Hold open book / attend BOR (minimum 7 days between open book and BOR (70.47))	Required	Required	Required	Required

A change in color across a row indicates a change in the level of task work required compared to the preceding assessment type

CONTRACT FOR ANNUAL FULL_VALUE ASSESSMENT SERVICES

Prepared for the
City of Fort Atkinson
Jefferson County

By



**Corporate Office
W6237 Neubert Rd. | P.O. Box 291
Greenville, WI 54942-0291
Phone (920) 749-1995/Fax (920) 731-4158**

CONTRACT FOR ASSESSMENT SERVICES

This Contract is by and between the **City of Fort Atkinson, Jefferson County, State of Wisconsin**, a municipal corporation (hereafter referred to as "Municipality") and **Associated Appraisal Consultants, Inc.**, with its principal office at W6237 Neubert Road, Appleton, WI 54913 (hereafter referred to as "Assessor").

IN CONSIDERATION of the mutual promises contained herein, the parties hereto do agree as follows:

I. **SCOPE OF SERVICES.** All services rendered shall be completed in full accordance and compliance with Wisconsin Statutes, the *Wisconsin Property Assessment Manual* and all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue as of the date of this Contract. Any new laws or administrative rule changes during the term of this Contract which alter the scope of services will need to be negotiated between both parties.

A. **COMPLIANCE.** Assessor shall keep the Municipality's assessed values in compliance with the requirements as prescribed under Wis. Stat. §70.05(5) for the duration of this contract term. The annual level of assessment shall be kept within 10% of the Municipality's prior year published equalized value.

B. **INSPECTIONS.** The following inspection cycle is to be completed by the Assessor annually:

- 1) New construction, annexed properties, and properties with a change in exemption status shall be physically inspected as necessary, and the property record card prepared or updated as needed.
- 2) Properties affected by building removal, fire, significant remodeling (those requiring a building permit), or other major condition changes shall be physically inspected as needed.
- 3) Improved properties under construction during the term of this Contract shall be re-inspected as needed.
- 4) All properties sold in the previous year, or affected by legal description changes, or zoning changes shall be reviewed and inspected if deemed necessary to ensure an accurate and fair assessment.
- 5) Requests for review by property owners, made after the close of the Board of Review, and prior to signing the Assessor's affidavit for the next assessment roll within the term of this Contract, and if deemed necessary shall be physically inspected during the current assessment cycle.
- 6) A classification review shall be conducted annually to determine eligibility for agricultural use value assessment and the assessment of agricultural forest land and undeveloped land.

B. **PARCEL IDENTIFICATION.** The legal description and size of each land parcel shall be contained in the existing property records. The drawings and measurements of each primary improvement shall be contained in the existing property records. For all new records, the Assessor at a minimum shall provide a digital drawing and digital photograph of each primary improvement. In the event of a discrepancy found in a small number of existing records, the Assessor shall investigate and correct the property record. Should large amounts of existing records be deficient, there shall be additional costs charged to the Municipality for onsite collection of missing data, and or correction of property records, as agreed upon by both parties.

C. **PREPARATION OF RECORDS.** Appropriate records shall be used in the evaluation and collection of data for residential improvements, commercial improvements, and agricultural

improvements. All information relating to the improvements shall be obtained and provided on the respective forms and or electronic records. The Assessor shall supply to the Municipality a complete set of property records in a computer readable format compatible with the Municipality's computer system and update property records within fourteen (14) days of final adjournment of the Board of Review. Records shall be updated prior to open book and again to reflect any changes made at Board of Review.

D. **APPROACH TO VALUE.** Assessor shall assess all taxable real estate according to market value, as established by professionally acceptable appraisal practices, except where otherwise provided by law. Assessor shall consider the sales comparison approach, the cost approach, and the income approach in the valuation of all applicable property.

E. **ASSESSMENT NOTICES.** A notice of changed assessment as prescribed under §70.365, Wis. Stats., shall be mailed for each applicable taxable parcel or property whose assessed value has changed from the previous year. The notice form used shall be that prescribed and or approved for use by the Wisconsin Department of Revenue and include the time and place of when the open book conference(s) and board of review meeting(s) will be held. Assessor shall be responsible for the preparation and timely mailing of all assessment notices by First Class Mail.

F. **OPEN BOOK.** Upon completion of the Assessor's review of assessments and prior to completion of the assessment roll, the Assessor shall hold open book conferences for the purpose of enabling property owners or their agents to review and compare the assessed values. The Assessor shall take the phone calls to schedule appointments for the open book conference as needed. The Assessor shall be present at the open book conference for a time sufficient to meet with the property owners or their agents and shall be present at least two (2) hours. Assessor shall provide necessary staff to accommodate projected attendance.

G. **COMPLETION OF ASSESSMENT ROLL AND REPORTS.** The Assessor shall be responsible for the proper completion of the assessment roll in accordance with current statutes and the *Wisconsin Property Assessment Manual*. The Assessor shall provide final assessment figures for each property to the Municipality, and the roll shall be totaled to exact balance. Assessor shall arrange and provide the Real Estate Assessment Roll for viewing by the public as prescribed in the *Wisconsin Property Assessment Manual*, as amended each year, and adhere to any county or Municipality requirements of the Assessor for property listing as prescribed under §70.09, Wis. Stats. Assessor shall prepare and submit all reports required of the Assessor by the Wisconsin Department of Revenue. Assessor shall prepare and submit the Agricultural Land Conversion Charge form to the County as required.

H. **BOARD OF REVIEW.** Assessor shall attend all required hearings of the Municipal Board of Review to explain and defend the assessed value and be prepared to testify under oath regarding the values determined. In the event of appeal to the Wisconsin Department of Revenue or Circuit Court, Assessor shall be available upon request of Municipality to furnish testimony in defense of the assessed values for up to eight (8) employee hours per parcel. Testimony in excess of eight (8) employee hours will require an addendum to this Contract. If deemed necessary and mutually agreed upon by both parties, any outside counsel services requested by the Assessor shall be provided and paid for by the Municipality as agreed upon by both parties.

I. **OPEN RECORDS REQUESTS.** The Assessor shall timely respond to all open records requests received by the Assessor. In so doing, the Assessor shall comply with the confidentiality provisions of the Wisconsin Statutes, including §70.35(3), Wis. Stats., regarding the personal property return, §70.47(7)(af), Wis. Stats., regarding income and expense information provided to the assessor and board of review; and §77.265, Wis. Stats., regarding the real estate transfer return.

J. **AVAILABILITY.** The Assessor shall maintain telephone service to receive calls from the Municipality or property owners five days a week, Monday through Friday, from 8:00 a.m. to 4:30 p.m. excluding holidays and Assessor's holiday and business closures. Internet and voicemail communication are available twenty-four hours per day. The Assessor shall timely respond to all telephone inquiries within four (4) business days or sooner. The Assessor shall respond to the municipal clerk on those

issues that have been raised to the clerk or board and subsequently passed on to the Assessor. Assessor shall be available to attend meetings at the request of the Municipality for up to two (2) hours annually not including annual assessment required meetings. Any additional meetings the Assessor shall be asked to attend beyond two (2) hours shall be compensated at the customary rates charged by the Assessor. The Municipality and the Assessor shall discuss the cost prior to attendance.

K. **MUNICIPALITY RECORDS.** The Municipality shall allow access and make available to the Assessor municipal records in digital and or paper form such as, but not limited to, previous assessment rolls and property assessment records, sewer, and water layouts, permits, building plans, site plans, tax records, records of special assessments, plats, condominium documents, maps, and any other pertinent documents currently in the possession of the Municipality at no cost. If such records necessary for our work are not in the possession of the Municipality, Assessor shall obtain them from the County Surveyor, Register of Deeds, or other sources at the Municipality's expense.

L. **MAPS.** Municipality shall provide at no cost to Assessor any plat maps, zoning maps, cadastral maps, GIS related maps, or any other maps currently in the possession of the Municipality. If such maps necessary for Assessor's work are not in the possession of the Municipality, Assessor shall obtain them from the County surveyor, Register of Deeds, or other sources at the Municipality's expense.

M. **MAILING SERVICES.** Assessor shall be responsible for the cost of all postage and mailing services. This cost includes, but is not limited to, notices of changed assessment, written requests to view property, questionnaires, and mailing of documents such as maps and assessment rolls. If Municipality requires Assessor to send any letters by certified mail, Municipality shall be responsible for the postage and mailing services costs of all certified mail.

II. GENERAL REQUIREMENTS

A. **OATH OF OFFICE.** As Assessor is a corporation, the person designated as responsible for the assessment shall take and subscribe to an oath or affirmation supporting the Constitution of the United States and to the State of Wisconsin and to faithfully perform the duties of Assessor. The oath shall conform to §19.01, Wis. Stats., and be filed with the Municipal Clerk. Assessor shall assume the appointed office of City Assessor as per §62.09 (1)(c), and §70.05(1), Wis. Stats., for the duration of this Contract and shall perform all statutory duties appertaining to such office. Under Wisconsin law, the statutory Assessor for the Municipality, whether elected, appointed, contracted or on-staff, is considered to be a public officer of the Municipality.

C. **QUALIFICATIONS AND CONDUCT OF PERSONNEL.** The Assessor shall provide at its own expense any personnel necessary and shall comply with the following:

- 1) All personnel providing services shall be currently certified in compliance with §70.05, §70.055, and §73.09, Wis. Stats., and the administrative rules prescribed by the Wisconsin Department of Revenue.
- 2) Assessor's field representatives shall carry photo identification cards.
- 3) All employees, agents, or representatives of the Assessor shall conduct themselves in a safe, sober, and courteous manner while performing services within the Municipality.
- 4) The Assessor shall review any complaint relative to the conduct of the Assessor's employees and take appropriate corrective action. If the Municipality deems the performance of any of Assessor's employees unsatisfactory, the Assessor shall, for good cause, remove such employees from work upon written request by Municipality, such request stating reasons for removal.

D. **INSURANCE.** The Assessor agrees as follows:

- 1) The Assessor shall obtain and maintain during the term of this Contract full coverage insurance to protect and hold harmless the Municipality which insurance is to include:

(a) Workers Compensation State of Wisconsin requirements

(b) General Liability

General Aggregate	\$ 2,000,000
Products/Completed Operations	\$ 1,000,000
Each Occurrence	\$ 1,000,000
Personal & Advertising	\$ 1,000,000
Fire Damage	\$ 100,000
Medical Expense	\$ 10,000

(c) Comprehensive Auto Liability

Combined Single Limit	\$ 1,000,000
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- 2) Liability for bodily injury, disability, and/or death of employees or any person or for damage to property caused in any way, directly or indirectly, by the operations of the Assessor within the Municipality shall be assumed by that Assessor.
- 3) Assessor agrees to carry proper and sufficient insurance to cover the loss of Municipality's records withdrawn from the Municipality by the Assessor for its use or by any subcontractors of Assessor, as well as Assessor's records in process under this Contract that are in the possession of the Assessor.
- 4) Assessor shall provide the Municipality with certificates for all required insurance, with the Municipality as a named insured. All insurance coverage shall contain a 10-day advance notice of cancellation to the Municipality. The Assessor shall pay all insurance premiums in a timely manner.

E. **INDEMNIFICATION.** The Assessor shall be considered a public officer and afforded the protection from civil liability under §895.46, Wis. Stats., for performing duties while acting within the scope of the Assessor's employment as an officer of the Municipality. Municipality shall indemnify, hold harmless, and defend Assessor from all claims and liabilities relating to the assessment or taxation of property, including but not limited to claims made under §74.35, and §74.37, Wis. Stats., and any circuit court claims, except claims and liabilities based on intentional or negligent acts or omissions of Assessor, or its employees, agents, or representatives, unless otherwise specified in this Contract. Assessor shall indemnify, hold harmless, and defend the Municipality against claims and liabilities based on intentional or negligent acts or omissions of Assessor, or its employees, agents, or representatives, including, but not limited to, liability under Wis. Stat. § 70.503 and any penalties imposed by law.

F. **OWNERSHIP OF RECORD.** All records prepared or maintained in connection with assessments in the Municipality shall at all times be and remain the sole property of the Municipality. If the record system is computerized, the software used by the Assessor shall be made available to the Municipality in the format native to the customized or uncommon software and shall be able to create an exportable text file of all required data. If the Municipality requires a conversion or transfer of the electronic assessment records to a non-proprietary neutral file format, such as but not limited to a text file format, XML or a tab delimited format, the Municipality shall be responsible for all costs associated with the conversion and or transfer of the electronically stored data.

III. TERM AND TERMINATION

A. **TERM.** The term of this Contract is for the **2026, 2027, 2028, 2029 and 2030** assessment year(s). The assessor shall have completed all work under this Contract on or before July 31 of each assessment year, excluding appearances beyond the Board of Review. The date of completion may be extended, if necessary, under the terms of this Contract and by mutual consent.

B. **TERMINATION.** Either party may terminate this Contract only with cause, cause being defined as default of the other party of terms of this Contract upon sixty (60) days written notice to the other party. Upon termination by either party, Assessor shall deliver to the Municipality all records and materials in Assessor's possession used or created during this Contract. During the 60-day wind down period, both Assessor and the Municipality shall act in good faith with each other and cooperate in the orderly transfer of records. If termination occurs during the course of ongoing assessment work, the Assessor shall be paid for undisputed services completed as of the date of written notice taking into consideration all scope of work to be performed during the assessment year of termination.

C. **DISPUTE RESOLUTION.** The parties agree to use good faith, reasonable efforts to meet, discuss, and try to resolve any disputes arising out of, or relating to, this Contract for a period of sixty (60) days. Municipality agrees to provide Assessor with written notice within thirty (30) days of becoming aware of a contract dispute. Assessor will convene within thirty (30) days of a written dispute notice, unless otherwise agreed. All dispute related meetings, correspondence and discussions between Assessor and Municipality will be deemed confidential settlement discussions not subject to disclosure. If Assessor fails to resolve the dispute, then the parties shall participate in non-binding mediation in an effort to resolve the dispute. If the dispute remains unresolved after mediation, then either party may assert their respective rights and remedies in a court of competent jurisdiction. Nothing in this section shall prevent Municipality or Assessor from seeking necessary injunctive relief during the dispute resolution.

D. **NOTICES.** Except as otherwise expressly specified herein, all notices that are required to be given under this Contract will be in writing and will be sent to the address of the appropriate party as set out in this Contract or such alternative address the recipient may designate by notice given in accordance with the provisions of this clause. Any such written notice may be deemed to have been given if delivered personally or mailed, by certified or registered mail, postage prepaid, return receipt requested.

E. **AUTOMATIC RENEWAL.** This Contract shall automatically renew for successive annual assessment years upon the expiration of the original term unless either party, on or before July 1 of the preceding year, notifies the other party of their desire to non-renew.

F. **ENTIRE CONTRACT.** This Contract contains the complete and entire Contract between the parties and supersedes any prior agreements, understandings, and representations, whether written, oral, expressed, implied, or statutory, and may not be altered or amended except in writing, executed, making specific references to this Contract, by a duly authorized officer of the Assessor and by a duly authorized official of the Municipality.

IV. COMPENSATION

- A. **ANNUAL AMOUNTS.** The Municipality shall pay Assessor the following annual Contract amounts for maintenance assessment services:

Assessment Year	Annual Amounts
2026	\$63,000
2027	\$63,000
2028	\$63,000
2029	\$63,000
2030	\$63,000

- B. **METHOD AND TERMS OF PAYMENT.** The compensation due to Assessor shall be paid in monthly or quarterly installments, or a one-time annual payment for each of the assessment year(s) as outlined under the term of this Contract. Municipality can request their preferred frequency of invoicing upon Contract acceptance; otherwise, a monthly installment schedule will be used. Invoices will be provided by Assessor on or before the first day of each month and shall be paid by Municipality no later than thirty (30) days from the date of invoice. In the event payment is not made within thirty (30) days from the date of invoice, Municipality shall pay a late fee of seventy-five dollars (\$75.00) and a processing fee of seventy-five dollars (\$75.00) for each month the invoice is not paid.
- C. **RENEWAL ADJUSTMENTS.** An increase of five percent (5%) shall be applied on an annual basis for each year of automatic renewal after the 2030 assessment year.
- D. **OPTIONAL WEBSITE POSTING.** The Municipality shall have the option to post assessment data on Assessor's public website for no additional cost.
*** Please initial yes or no to post data. ***
Yes ___ No ___
- E. Additional compensation that may be due to the Assessor as a result of services provided that are beyond the scope of this Contract will be invoiced in the month subsequent to the month in which the services were provided.

V. SIGNATURES



Mark Brown
President
Associated Appraisal Consultants, Inc.

07/25/2025
Date

Authorized Signature
City of Fort Atkinson

Date



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Tom Williamson, Public Works Superintendent

RE: Review and possible action relating to an invoice for the new Public Works and Parks Facility HVAC system annual service maintenance work from Total Mechanical (Williamson, Superintendent of Public Works)

BACKGROUND

The Public Works and Parks Operations facility construction is now complete, and the HVAC system installed requires regular maintenance and upkeep to serve the city for many years to come. This regular maintenance occurs seasonally as cooling is necessary in the warmer months and heating in the cooler months. Staff sought to better understand the effort and regular required parts needed to establish a maintenance plan that maximizes the lifespan of the newly installed system.

DISCUSSION

Staff reached out to the design and installation company for the new facility, Total Mechanical of Janesville, to establish an appropriate budget for the new system contract maintenance. Staff felt that the design and installation contractor for this new system would be most familiar and efficient in assisting with the annual maintenance budget to achieve a quality long life for the new system. Total Mechanical provided an initial proposal for the annual maintenance budget contract of \$13,126.00. Staff reviewed the proposal and met with the contractor to discuss the proposed annual cost with hopes of finding a way to reduce it. The contractor agreed to provide the first service on a time and materials basis to better establish the related cost of maintenance. Total mechanical performed the first service, on said time and materials basis, and the attached invoice includes all the required items needed to perform the regular system maintenance.

FINANCIAL ANALYSIS

The 2025 General Fund Account (PW Operations - Building Maintenance) includes anticipated costs for contracted services such as these for the facility. The 2025 budget is \$20,000.00 and to date the remaining available funds are \$19,443.27.

RECOMMENDATION

Staff recommends approving the invoice from Total Mechanical in an amount not to exceed \$9,500.00 using funds from the PW Operations - Building Maintenance Account.

ATTACHMENTS

1. Invoice

Work Order Invoice 2505824

Invoice Date: 6/30/25

Bill to:
City Of Fort Atkinson
Municipal Building
101 N Main St
Fort Atkinson, WI 53538

Job Address:
City Of Fort Atkinson DPW
600 Talcott Ave
Fort Atkinson, WI 53538

Customer Code	Payment Terms	Customer PO Number
27977	Upon Receipt	
Remarks: City Of Fort Atkinson DPW WO# 2505824		

Description of Work Completed

Preformed Preventive Maintenance on all HVAC equipment.
Changed all filters and belts. Clean all sensors. Pressure washed all coils.

Labor

Week ending 05/17/25	Sun	Mon	Tues	Wed	Thur	Fri	Sat	Total	Rate	Extension
R-Ryan M Wingerson					2.00			2.00	152.00	304.00
R-Jacob T Teniente					2.00			2.00	152.00	304.00
Week ending 05/24/25	Sun	Mon	Tues	Wed	Thur	Fri	Sat	Total	Rate	Extension
R-Ryan M Wingerson			6.00					6.00	152.00	912.00
R-Jacob T Teniente			6.00					6.00	152.00	912.00

Material Used

Quantity	Description	Unit Price	Extension
1.0	Filters, Belts, Sensors, Misc	7,068.00	7,068.00

Past due invoices may be subject to a 1.5% late charge.

9,500.00

Invoices under \$10,000 can be paid by credit card at:
<https://pay.mysfsgateway.com/totalmechanical>

Invoice Total: 9,500.00



MEMORANDUM

DATE: August 19, 2025

TO: Fort Atkinson City Council

FROM: Tom Williamson, Public Works Superintendent

RE: Review and possible action relating to the Public Works and Parks Operations Facility HVAC service maintenance contract (Williamson, Public Works Superintendent)

BACKGROUND

The Public Works and Parks Operations facility construction is now complete. Part of the process to maintain the new facility will be to actively service and manage the heating, ventilation and cooling system (HVAC). As this facility is considerably larger and inherently more complex, staff believe that actively maintaining the HVAC system will maximize the city's investment.

DISCUSSION

Staff reached out to the design and installation contractor, Total Mechanical of Janesville, WI, who installed the new system and controls to assist in establishing an annual budget to perform any required inspections and general system maintenance. In February, Total Mechanical prepared a proposal for the anticipated service including parts and labor, attached with this memo, for the amount of \$13,126.00. Staff reviewed the initial proposal and met several times with the contractor to attempt to reduce the annual maintenance cost. Total Mechanical agreed to perform the first full service on a time and materials basis to better establish the required amount of labor and all materials costs in hopes of reducing the city's investment needs. As a result of this initial service, Total Mechanical provided a revised proposal in July 2025 that better reflects the budgetary requirement for these annual service needs, and this proposal is included in the Council packet.

FINANCIAL ANALYSIS

Staff has budgeted funds in the PW Operations - Building Maintenance account to actively maintain the new HVAC system. Staff have committed to including the required funds within this account in future budgets to continue to maximize the useful life of the system and support the city's new facility investment in the long run. The cost of the maintenance contract is \$9,500 for the first year. The contract auto-renews annually with an increase of 4%. The first payment on this contract will be in 2026 in the amount of \$9,880.

RECOMMENDATION

Staff recommends the City Council approve the commercial heating and air conditioning planned maintenance proposal from Total Mechanical and authorize the City Manager to execute it.

ATTACHMENTS

1. Fort Atk DPW PM Quote 2-14-25
2. Fort Atk DPW PM Quote 7-8-2025

COMMERCIAL HEATING AND AIR CONDITIONING PLANNED MAINTENANCE PROPOSAL

Exclusively Prepared For:



DEPARTMENT OF PUBLIC WORKS



BUILDING AUTOMATION **ELECTRICAL** FIRE PROTECTION **HVAC** PLUMBING

TOTAL MECHANICAL, INC. W234 N2830 PAUL RD PEWAUKEE, WI 53072
PHONE: 262-523-2500 FAX: 262-523-2530
www.total-mechanical.com

Remember to schedule time for maintenance or your equipment will schedule it for you



**INSPECTION AND PLANNED MAINTENANCE
COMMERCIAL HEATING AND/OR
AIR CONDITIONING AGREEMENT**

ISSUED BY:
TOTAL MECHANICAL, INC.
1522 W KNILANS RD
JANESVILLE, WI 53546
TELEPHONE: (262) 523-2500
www.total-mechanical.com

This agreement is issued to: **CITY OF FORT ATKINSON**

This agreement is to be effective on **April 1, 2025**, covering equipment located at:
600 TALCOTT AVENUE, FORT ATKINSON, WISCONSIN.

We agree to perform inspections and planned maintenance services as indicated on the Service Summary attached to and made a part of this agreement for a period of twelve months from the effective date. The agreement shall automatically renew each year with an increase of 4%, unless otherwise notified by either party with a 30-day written notice.

The inspections and planned maintenance to be performed as a part of this agreement include:

1. Those services referred to on the Service Summary.
 - ☒ Cooling Inspections will be performed annually.
 - ☒ Heating Inspections will be performed annually.
 - ☒ We will replace pleated air filters on a semi-annual basis.
 - ☒ We will replace drive belts annually.
 - ☒ We will clean condenser coils annually.
2. Specifically excluded from this agreement are:
 - ☐ HEPA filters.
 - ☒ Chemical water treatment
 - ☐ Condenser coil cleaning

The services outlined in this agreement will be performed during normal working hours. No additional billable work will be performed without prior customer approval. Emergency repair service will be dispatched on a preferential basis and will be provided at our current preferred planned maintenance agreement customer rate.

The total annual agreement cost for the Equipment listed will be: **\$13,126.00**

Total Mechanical Approval: _____ Date: _____

Customer Acceptance: _____ Date: _____

One-fourth of the total sum, plus sales tax, will be billed quarterly. Terms are net 30 days. After 30 days a 2% service fee will be automatically added. If the balance is not paid within 60 days this agreement shall automatically cease as of that date and we shall have no other obligation of any nature whatsoever. This agreement is non-transferable.

Planned Maintenance Benefits

1. Equipment properly maintained lasts longer.
2. Equipment properly maintained costs less to run.
3. Eliminates nuisance service calls.
4. When emergency service is required:
 - A. You receive priority service.
 - B. You receive preferred service rates.
 - C. Your primary service technician is more efficient because they are already familiar with your equipment, equipment location, and service history.
5. Equipment safety devices are checked.

Exclusions

There shall be no liability under this agreement:

1. for structural alterations to the premises within which the equipment included is installed, necessary for service or parts repair or replacement as provided for in this contract.
2. for any default, delay in performance or extraordinary damage hereunder caused by any contingency beyond our control, including war, government restrictions or restraints, strikes, fire, floods, or short or reduced supply of any material or furnished products.
3. for any consequential damages of any nature whatsoever, including damages arising because of or resulting from a failure of a component part of the included equipment, or the inspection, maintenance or repair of said equipment.
4. which in any way duplicates protection provided under any other existing warranty or contract.
5. for system design or performance in maintaining design conditions except through failures of equipment specifically covered herein.
6. for failure to discover conditions necessitating repairs or replacement.

This agreement does not cover electrical service, duct work and insulation, recording instrument, gages or thermometers, water supply and drains, air volume adjustment, plumbing or piping or work required by government and other codes and regulations nor any services performed beyond those specifically enumerated herein.

Conditions

The only parties to the agreement are customer and Total Mechanical

The time, means and methods to be employed by Total Mechanical in the performance of this agreement are solely within Total Mechanical's discretion.

Repair or replacement of defective materials, parts or equipment is solely within Total Mechanical's discretion.

This agreement shall be void if the included equipment, in Total Mechanical's judgment, has been subject to misuse, negligence, accident, fire, lightning, windstorm, or vandalism, or if the equipment has been tampered with or altered in any way or operated contrary to the manufacturer's instructions.

Any repairs resulting from any cause other than those within the equipment warranty shall be billed by Total Mechanical at the then prevailing rate or materials and labor.

The services to be performed under this agreement are not a guarantee against obsolescence or normal wear. Nor shall inspections be construed as an approval or guarantee of the condition of the equipment. The warranties and obligations set forth herein are in lieu of all other warranties and liabilities expressed or implied in law or in fact including warranties of merchantability and fitness for particular use.

SERVICE SUMMARY – CITY OF FORT ATKINSON

The following planned maintenance will be performed on your HVAC equipment located at:
[600 TALCOTT AVENUE, FORT ATKINSON, WISCONSIN.](#)

Air Handling Units with Condensers (1)

Cooling Inspection

- Replace air filters with commercial pleated filters [annually](#)
- Inspect blower belts, check tension [and replace if necessary](#)
- Lubricate blower motor and bearings
- Inspect blower wheel, shaft and bearings
- Check sheave and pulley alignment and security
- Measure and record blower motor voltage and amperage
- Inspect evaporator coil and brush clean if necessary
- Inspect and clean condensate drain
- Check crankcase heater for operation
- Measure and record compressor voltage and amperage
- Measure and record refrigerant operating pressures
- Check for refrigerant leaks
- Check high-pressure and low-pressure controls
- Inspect condenser coil
- Inspect condenser fan motor and blade
- Measure and record condenser motor voltage and amperage
- Measure entering air and leaving air temperatures
- Check economizer function
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arcing and pitting

Air Handling Units (1)

Heating Inspection

- Replace air filters with commercial pleated filters [annually](#)
- [Replace blower belts](#) and adjust tension
- Lubricate blower motor and bearings
- Inspect blower wheel, shaft and bearings
- Check sheave and pulley alignment and security
- Measure and record blower motor voltage and amperage
- Check economizer function
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arcing and pitting

Make-Up Air Units (3)

Cooling Inspection

- Inspect air filters and clean if necessary
- Inspect blower belts, check tension [and replace if necessary](#)
- Lubricate blower motor and bearings
- Inspect blower wheel, shaft and bearings
- Check sheave and pulley alignment and security
- Measure and record blower motor voltage and amperage
- Lubricate dampers and check operation
- Check damper actuator and linkage
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arcing and pitting

Make-Up Air Units (3)

Heating Inspection

- Inspect air filters and clean if necessary
- [Replace blower belts](#) and adjust tension
- Lubricate blower motor and bearings
- Inspect blower wheel, shaft and bearings
- Check sheave and pulley alignment and security
- Measure and record blower motor voltage and amperage
- Lubricate dampers and check operation
- Check damper actuator and linkage
- Clean ignitor and flame rod
- Check and clean burners
- Check for gas leaks
- Check gas valve operation and record pressure
- Check operation of air flow switch and high limit control
- Measure and record temperature rise
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arcing and pitting

Exhaust Fans (9)

[Heating and Cooling](#) Inspection

- Inspect fan belts, check tension [and replace if necessary](#)
- Lubricate fan motor and bearings
- Inspect fan wheel, shaft and bearings
- Check sheave and pulley alignment and security
- Measure and record fan motor voltage and amperage
- Check all electrical connections and tighten as needed

Gas Unit Heaters (5)

Heating Inspection

- Lubricate fan motor and bearings
- Inspect fan blade and bearings
- Measure and record fan motor voltage and amperage
- Inspect heat exchanger condition
- Check and clean burners
- Check for gas leaks
- Check gas valve operation and record pressure
- Check operation of high limit control
- Check inducer motor and wheel
- Measure and record inducer motor voltage and amperage
- Check and inspect exhaust venting
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arching and pitting

Boilers (2)

Heating Inspection

- Inspect flues
- Inspect refractory
- Check piping and connections
- Check low water cut off and clean if needed
- Check water make up system
- Check water level gauge glass and controls
- Check safety relief valves
- Inspect burner chamber
- Check and clean burners
- Check burner operation
- Check combustion controls
- Check high and low fire for proper operation
- Check for gas leaks
- Check gas valve operation and record pressure
- Check all safety controls for proper operation
- Check boiler temperature and pressure and adjust if needed
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arching and pitting
- Check boiler room intake air system

Circulating Pumps (6)

Semi-Annual Inspection

- Lubricate motor and pump bearings
- Inspect seals and packing
- Check pump alignment and coupling
- Check motor mounts and vibration pads and tighten as needed
- Check for water leaks
- Measure and record motor voltage and amperage
- Check all electrical connections and tighten as needed

Ductless Splits (2)

Cooling & Heating Inspection

- Clean washable filter
- Lubricate blower motor and bearings
- Inspect blower wheel, shaft and bearings
- Measure and record blower motor voltage and amperage
- Inspect evaporator coil and brush clean if necessary
- Inspect and clean condensate drain
- Check crankcase heater for operation
- Measure and record compressor voltage and amperage
- Measure and record refrigerant operating pressures
- Check for refrigerant leaks
- Check high-pressure and low-pressure controls
- Inspect condenser coil
- Inspect condenser fan motor and blade
- Measure and record condenser motor voltage and amperage
- Measure entering air and leaving air temperatures
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arching and pitting

Infrared / Radiant Tube Heaters (13)

Heating Inspection

- Check and clean burners
- Check inducer motor and wheel
- Measure and record inducer motor voltage and amperage
- Check for gas leaks
- Check gas valve operation and record pressure
- Check operation of air flow switch
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arching and pitting
- Check calibration and function of thermostat

Hot Water Unit Heaters (8)

Heating Inspection

- Lubricate fan motor and bearings
- Inspect fan blade and bearings
- Check for water leaks
- Inspect hot water coil and clean as needed
- Measure and record fan motor voltage and amperage
- Check calibration and function of thermostat

Electric Wall Heaters (3)

Heating Inspection

- Lubricate fan motor and bearings
- Inspect fan blade and bearings
- Measure and record fan motor voltage and amperage
- Inspect heating element
- Measure and record heating element voltage and amperage
- Check operation of high limit control
- Check calibration and function of thermostat

VAV's (6)

Cooling & Heating Inspection

- Check VAV operation
- Check for leaks at unit
- Check cooling valve operation if applicable
- Check heating valve operation if applicable

Kitchen Hood (1)

Cooling & Heating Inspection

- Inspect discharge nozzles for grease build up and clean and/or replace as needed
- Replace fusible links for signs of loosening and wear. Replace as needed.
- Inspect extinguisher tank. Replace tank if any leaks detected.

Destratification Fan (6)

Cooling Inspection

- Check guy wires if applicable for tension and for frayed sections. Re-tension if necessary.
- Inspect blades and clean if necessary.
- Check reverse operations and set properly as needed.

VFDs (3)

Cooling & Heating Inspection

- Examine equipment for damaged parts, discoloration, unusual noise, or odor.
- Examine equipment for dirt or dust on components and clean as necessary.
- Check circuit boards for rust making sure that all connections are correctly fastened and clean as necessary.
- Check cooling fan for correct oscillation and damaged or missing blades.
- Examine air intake and exhaust openings and clean as necessary.

COMMERCIAL HEATING AND AIR CONDITIONING PLANNED MAINTENANCE PROPOSAL

Exclusively Prepared For:



DEPARTMENT OF PUBLIC WORKS

TOTAL.
MECHANICAL

Building Integrity

BUILDING AUTOMATION ELECTRICAL FIRE PROTECTION HVAC PLUMBING

TOTAL MECHANICAL, INC. W234 N2830 PAUL RD PEWAUKEE, WI 53072
PHONE: 262-523-2500 FAX: 262-523-2530
www.total-mechanical.com

Remember to schedule time for maintenance or your equipment will schedule it for you



INSPECTION AND PLANNED MAINTENANCE
COMMERCIAL HEATING AND/OR
AIR CONDITIONING AGREEMENT

ISSUED BY:
TOTAL MECHANICAL, INC.
1522 W KNILANS RD
JANESVILLE, WI 53546
TELEPHONE: (262) 523-2500
www.total-mechanical.com

This agreement is issued to: **CITY OF FORT ATKINSON**
This agreement is to be effective on **August 1, 2025**, covering equipment located at:
600 TALCOTT AVENUE, FORT ATKINSON, WISCONSIN.

We agree to perform inspections and planned maintenance services as indicated on the Service Summary attached to and made a part of this agreement for a period of twelve months from the effective date. The agreement shall automatically renew each year with an increase of 4%, unless otherwise notified by either party with a 30-day written notice.

The inspections and planned maintenance to be performed as a part of this agreement include:

1. Those services referred to on the Service Summary.
 - ☒ Cooling Inspections will be performed annually.
 - ☒ Heating Inspections will be performed annually.
 - ☒ We will replace pleated air filters on a semi-annual basis.
 - ☒ We will replace drive belts annually.
 - ☒ We will clean condenser coils annually.
2. Specifically excluded from this agreement are:
 - ☐ HEPA filters.
 - ☒ Chemical water treatment
 - ☐ Condenser coil cleaning

The services outlined in this agreement will be performed during normal working hours. No additional billable work will be performed without prior customer approval. Emergency repair service will be dispatched on a preferential basis and will be provided at our current preferred planned maintenance agreement customer rate.

The total annual agreement cost for the Equipment listed will be: **\$9,500.00**

Total Mechanical Approval: _____ Date: _____

Customer Acceptance: _____ Date: _____

One-fourth of the total sum, plus sales tax, will be billed quarterly. Terms are net 30 days. After 30 days a 2% service fee will be automatically added. If the balance is not paid within 60 days this agreement shall automatically cease as of that date and we shall have no other obligation of any nature whatsoever. This agreement is non-transferable.

Planned Maintenance Benefits

1. Equipment properly maintained lasts longer.
2. Equipment properly maintained costs less to run.
3. Eliminates nuisance service calls.
4. When emergency service is required:
 - A. You receive priority service.
 - B. You receive preferred service rates.
 - C. Your primary service technician is more efficient because they are already familiar with your equipment, equipment location, and service history.
5. Equipment safety devices are checked.

Exclusions

There shall be no liability under this agreement:

1. for structural alterations to the premises within which the equipment included is installed, necessary for service or parts repair or replacement as provided for in this contract.
2. for any default, delay in performance or extraordinary damage hereunder caused by any contingency beyond our control, including war, government restrictions or restraints, strikes, fire, floods, or short or reduced supply of any material or furnished products.
3. for any consequential damages of any nature whatsoever, including damages arising because of or resulting from a failure of a component part of the included equipment, or the inspection, maintenance or repair of said equipment.
4. which in any way duplicates protection provided under any other existing warranty or contract.
5. for system design or performance in maintaining design conditions except through failures of equipment specifically covered herein.
6. for failure to discover conditions necessitating repairs or replacement.

This agreement does not cover electrical service, duct work and insulation, recording instrument, gages or thermometers, water supply and drains, air volume adjustment, plumbing or piping or work required by government and other codes and regulations nor any services performed beyond those specifically enumerated herein.

Conditions

The only parties to the agreement are customer and Total Mechanical

The time, means and methods to be employed by Total Mechanical in the performance of this agreement are solely within Total Mechanical's discretion.

Repair or replacement of defective materials, parts or equipment is solely within Total Mechanical's discretion.

This agreement shall be void if the included equipment, in Total Mechanical's judgment, has been subject to misuse, negligence, accident, fire, lightning, windstorm, or vandalism, or if the equipment has been tampered with or altered in any way or operated contrary to the manufacturer's instructions.

Any repairs resulting from any cause other than those within the equipment warranty shall be billed by Total Mechanical at the then prevailing rate or materials and labor.

The services to be performed under this agreement are not a guarantee against obsolescence or normal wear. Nor shall inspections be construed as an approval or guarantee of the condition of the equipment. The warranties and obligations set forth herein are in lieu of all other warranties and liabilities expressed or implied in law or in fact including warranties of merchantability and fitness for particular use.

SERVICE SUMMARY – CITY OF FORT ATKINSON

The following planned maintenance will be performed on your HVAC equipment located at:
[600 TALCOTT AVENUE, FORT ATKINSON, WISCONSIN.](#)

Air Handling Units with Condensers (1)

Cooling Inspection

- Replace air filters with commercial pleated filters [annually](#)
- Inspect blower belts, check tension [and replace if necessary](#)
- Lubricate blower motor and bearings
- Inspect blower wheel, shaft and bearings
- Check sheave and pulley alignment and security
- Measure and record blower motor voltage and amperage
- Inspect evaporator coil and brush clean if necessary
- Inspect and clean condensate drain
- Check crankcase heater for operation
- Measure and record compressor voltage and amperage
- Measure and record refrigerant operating pressures
- Check for refrigerant leaks
- Check high-pressure and low-pressure controls
- Inspect condenser coil
- Inspect condenser fan motor and blade
- Measure and record condenser motor voltage and amperage
- Measure entering air and leaving air temperatures
- Check economizer function
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arcing and pitting

Air Handling Units (1)

Heating Inspection

- Replace air filters with commercial pleated filters [annually](#)
- [Replace blower belts](#) and adjust tension
- Lubricate blower motor and bearings
- Inspect blower wheel, shaft and bearings
- Check sheave and pulley alignment and security
- Measure and record blower motor voltage and amperage
- Check economizer function
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arcing and pitting

Make-Up Air Units (3)

Cooling Inspection

- Inspect air filters and clean if necessary
- Inspect blower belts, check tension [and replace if necessary](#)
- Lubricate blower motor and bearings
- Inspect blower wheel, shaft and bearings
- Check sheave and pulley alignment and security
- Measure and record blower motor voltage and amperage
- Lubricate dampers and check operation
- Check damper actuator and linkage
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arcing and pitting

Make-Up Air Units (3)

Heating Inspection

- Inspect air filters and clean if necessary
- [Replace blower belts](#) and adjust tension
- Lubricate blower motor and bearings
- Inspect blower wheel, shaft and bearings
- Check sheave and pulley alignment and security
- Measure and record blower motor voltage and amperage
- Lubricate dampers and check operation
- Check damper actuator and linkage
- Clean ignitor and flame rod
- Check and clean burners
- Check for gas leaks
- Check gas valve operation and record pressure
- Check operation of air flow switch and high limit control
- Measure and record temperature rise
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arcing and pitting

Exhaust Fans (9)

[Heating and Cooling](#) Inspection

- Inspect fan belts, check tension [and replace if necessary](#)
- Lubricate fan motor and bearings
- Inspect fan wheel, shaft and bearings
- Check sheave and pulley alignment and security
- Measure and record fan motor voltage and amperage
- Check all electrical connections and tighten as needed

Gas Unit Heaters (5)

Heating Inspection

- Lubricate fan motor and bearings
- Inspect fan blade and bearings
- Measure and record fan motor voltage and amperage
- Inspect heat exchanger condition
- Check and clean burners
- Check for gas leaks
- Check gas valve operation and record pressure
- Check operation of high limit control
- Check inducer motor and wheel
- Measure and record inducer motor voltage and amperage
- Check and inspect exhaust venting
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arching and pitting

Boilers (2)

Heating Inspection

- Inspect flues
- Inspect refractory
- Check piping and connections
- Check low water cut off and clean if needed
- Check water make up system
- Check water level gauge glass and controls
- Check safety relief valves
- Inspect burner chamber
- Check and clean burners
- Check burner operation
- Check combustion controls
- Check high and low fire for proper operation
- Check for gas leaks
- Check gas valve operation and record pressure
- Check all safety controls for proper operation
- Check boiler temperature and pressure and adjust if needed
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arching and pitting
- Check boiler room intake air system

Circulating Pumps (6)

Semi-Annual Inspection

- Lubricate motor and pump bearings
- Inspect seals and packing
- Check pump alignment and coupling
- Check motor mounts and vibration pads and tighten as needed
- Check for water leaks
- Measure and record motor voltage and amperage
- Check all electrical connections and tighten as needed

Ductless Splits (2)

Cooling & Heating Inspection

- Clean washable filter
- Lubricate blower motor and bearings
- Inspect blower wheel, shaft and bearings
- Measure and record blower motor voltage and amperage
- Inspect evaporator coil and brush clean if necessary
- Inspect and clean condensate drain
- Check crankcase heater for operation
- Measure and record compressor voltage and amperage
- Measure and record refrigerant operating pressures
- Check for refrigerant leaks
- Check high-pressure and low-pressure controls
- Inspect condenser coil
- Inspect condenser fan motor and blade
- Measure and record condenser motor voltage and amperage
- Measure entering air and leaving air temperatures
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arching and pitting

Infrared / Radiant Tube Heaters (13)

Heating Inspection

- Check and clean burners
- Check inducer motor and wheel
- Measure and record inducer motor voltage and amperage
- Check for gas leaks
- Check gas valve operation and record pressure
- Check operation of air flow switch
- Check all electrical connections and tighten as needed
- Check all contactors and relays for arching and pitting
- Check calibration and function of thermostat

Hot Water Unit Heaters (8)

Heating Inspection

- Lubricate fan motor and bearings
- Inspect fan blade and bearings
- Check for water leaks
- Inspect hot water coil and clean as needed
- Measure and record fan motor voltage and amperage
- Check calibration and function of thermostat

Electric Wall Heaters (3)

Heating Inspection

- Lubricate fan motor and bearings
- Inspect fan blade and bearings
- Measure and record fan motor voltage and amperage
- Inspect heating element
- Measure and record heating element voltage and amperage
- Check operation of high limit control
- Check calibration and function of thermostat

VAV's (6)

Cooling & Heating Inspection

- Check VAV operation
- Check for leaks at unit
- Check cooling valve operation if applicable
- Check heating valve operation if applicable

Kitchen Hood (1)

Cooling & Heating Inspection

- Inspect discharge nozzles for grease build up and clean and/or replace as needed
- Replace fusible links for signs of loosening and wear. Replace as needed.
- Inspect extinguisher tank. Replace tank if any leaks detected.

Destratification Fan (6)

Cooling Inspection

- Check guy wires if applicable for tension and for frayed sections. Re-tension if necessary.
- Inspect blades and clean if necessary.
- Check reverse operations and set properly as needed.

VFDs (3)

Cooling & Heating Inspection

- Examine equipment for damaged parts, discoloration, unusual noise, or odor.
- Examine equipment for dirt or dust on components and clean as necessary.
- Check circuit boards for rust making sure that all connections are correctly fastened and clean as necessary.
- Check cooling fan for correct oscillation and damaged or missing blades.
- Examine air intake and exhaust openings and clean as necessary.