



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

**CITY COUNCIL MEETING
IN PERSON AND VIA ZOOM
TUESDAY, DECEMBER 16, 2025 – 7:00 PM
CITY HALL – SECOND FLOOR**

<https://us02web.zoom.us/j/5997866403?pwd=alcreldSbGpNUVI1VnR1RWF5bXovdz09&omn=85105919995>

Meeting ID: 599 786 6403

Passcode: 53538

Dial by Location

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

AGENDA

- 1. Call meeting to order**
- 2. Roll call**
- 3. 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 December 2, 2025, City Council meeting** (Ebbert, Clerk/Treasurer/Finance Director)
 - b. Review and possible action relating to the **minutes of the December 9, 2025, Plan Commission meeting** (Ebbert, Clerk/Treasurer/Finance Director)
 - c. Review and possible action relating to the **minutes of the December 11, 2025, Transportation and Traffic Review Committee meeting** (Ebbert, Clerk/Treasurer/Finance Director)
 - d. Review and possible action relating to **building, plumbing, and electrical permit report for November 2025** (Draeger, Building Inspector/Zoning Administrator)
 - e. Review and possible action relating to the City Clerk-issued **License and Permit**

Report for November 2025 (Ebbert, Clerk/Treasurer/Finance Director)

- f. Review and possible action relating to **City Sewer, Water, and Stormwater Utility Financial Statements** as of November 30, 2025 (Ebbert, Clerk/Treasurer/Finance Director)
- g. Review and possible action relating to a **Special Event: Friends of Haumerson's Pond Winter Ski, Skate and Hike**, Saturday, February 7, 2026, from 2 p.m. to 8 p.m. (Ebbert, Clerk/Treasurer/Finance Director)
- h. Review and possible action relating to a **Special Event: Generals Fort Atkinson Cruise Night: May 11, 2026, June 8, 2026, July 13, 2026, August 10, 2026, and September 14, 2026, from 5:30-8:30 pm at Jones Park.** (Ebbert, Clerk/Treasurer/Finance Director)
- i. Review and possible action relating to a **Special Event: General's Baseball Fest, June 18, 2026-June 21, 2026, at Jones Park** (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

- a. Presentation—Jefferson County Financial Empowerment Center (Heather Nunez)

8. Resolutions and Ordinances

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 relating to the **Rescheduling of City Council meetings** to accommodate 2026 Elections (Ebbert, Clerk/Treasurer/Finance Director)
- b. Review and possible action relating to **Appointment of Election Inspectors** for a two-year cycle (Ebbert, Clerk/Treasurer/Finance Director)
- c. Review and possible action relating to a one-year Intergovernmental Agreement with the Town of Koshkonong for **Building Inspection Services** (Draeger,

Neighborhood and Building Services Director)

- d. Review and possible action relating to an **Extraterritorial Certified Survey Map** for the property located at W6116 Star School Road in the Town of Koshkonong (Draeger, Director of Neighborhood and Building Services)
- e. Review and possible action relating to a request from the **Wisconsin Economic Development Corporation (WEDC) to return unused Capital Catalyst Revolving Loan funds** (Houseman, City Manager)
- f. Review and possible action to authorize the City Manager to execute the **2026 Joint Powers Agreement** with Jefferson County for the County 911 Emergency System (Houseman, City Manager)
- g. Review and possible action relating to the **Proposal for Public Tree Inventory and Urban Forestry Management Plan** (Williamson, Superintendent of Public Works)
- h. Review and possible action relating to a request to order **GETAC Body Camera Fleet & In-Squad Video Recording System** at a cost not to exceed \$25,847.00 (Lindsey, Police Captain)
- i. Review and possible action relating to **N. Main St. Sanitary Sewer Design Task Order** (Navin, Director of Public Works)
- j. Review and possible action relating to **Amendment No. 1 to Task Order 2025-02: 2026 Road Rehabilitation and Water Relay-Design Project** (Navin, Director of Public Works)
- k. Review and possible action relating to the **purchase and replacement of 10 tires** for Fort Atkinson Fire Department Tender 8191 (Peterson, Fire Chief)
- l. Review and possible action relating to the **purchase of a Fire Department battalion vehicle**, 2026 Ford F-350 Crew Cab with equipment and modifications at a cost not to exceed \$125,511.91. (Peterson, Fire Chief)

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: December 11, 2025

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

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[IGNORE_INDENT]



**CITY COUNCIL MEETING
IN PERSON AND VIA ZOOM
TUESDAY, DECEMBER 2, 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: Cm. Huckabee, Johnson, Lescohier, Schultz and President Jaeckel. Also present: City Manager, City Attorney, City Clerk/Treasurer/Finance Director, Director of Public Works, Public Works Superintendent, Police Chief and Fire Chief.

3. Pledge of Allegiance

President Jaeckel led the Pledge of Allegiance.

4. Consent Agenda

Huckabee moved, seconded by Johnson to approve the Consent Agenda as presented, items 4.a through 4.b. Motion carried.

- a. *Review and possible action relating to the **minutes of the November 18, 2025 City Council meeting** (Ebbert, Clerk/Treasurer/Finance Director)*
- b. *Review and possible action on a **Special Event: Farmers Market Holiday Shop Hop, Saturday, December 6, 2025, 9:00 am - 3:00 pm** (Ebbert, Clerk/Treasurer/Finance Director)*

5. Public Hearings

None.

6. Public Comment for Matters on the Agenda

None.

7. Petitions, Requests, and Communications

None.

8. Resolutions and Ordinances

- a. *Review and possible action relating to a **Resolution Authorizing the Issuance and Establishing***

***Parameters for the Sale of Not to Exceed \$7,000,000 General Obligation Promissory Notes
(Houseman, City Manager)***

Justin Fischer, Baird Managing Director presented the information for the 2026-2027 borrowing. Since 2022, the City has been on an every-other-year borrowing cycle. Prior to this, City borrowings were done on a project-by-project basis without planning for the long-term impact of current and future potential debt service payments. Under the new cycle, the City has borrowed in 2022 and 2024, and plans to borrow approximately \$7,000,000 in 2026 for capital projects and purchases in 2026 and 2027, as outlined in the approved 2026 budget and 2026-2031 capital improvements plan. Note that \$3.5M of the total is the refinancing of the 2024 Note Anticipation Note, Series 2024B, which was borrowed in 2024 to pay for the Ridge View Estates subdivision infrastructure, and will be repaid through the increment generated in TID #9. \$3.4M is to support the projects and purchases listed in Section I (Debt Service) in the adopted 2026 budget for 2026 and 2027 and included in the attached spreadsheet. Note that the \$3.4M in debt will be repaid through the City's tax levy and Water Utility fund.

Schultz moved, seconded by Lescohier to approve the resolution authorizing the issuance and establishing parameters for the sale of not to exceed \$7,000,000 General Obligation Promissory Notes. Motion carried unanimously.

RESOLUTION NO. 1448

RESOLUTION AUTHORIZING THE ISSUANCE AND ESTABLISHING PARAMETERS FOR THE SALE OF NOT TO EXCEED \$7,000,000 GENERAL OBLIGATION PROMISSORY NOTES

WHEREAS, the City Council of the City of Fort Atkinson, Jefferson County, Wisconsin (the "City") hereby finds and determines that it is necessary, desirable and in the best interest of the City to raise funds for public purposes, including paying the cost of projects included in the City's 2026-2027 capital improvement plan (the "Project");

WHEREAS, the City Council hereby further finds and determines that it is necessary, desirable and in the best interest of the City to raise funds to pay the cost of refinancing certain outstanding obligations of the City, specifically, the Note Anticipation Notes, Series 2024B, dated March 1, 2024 (the "Refunded Obligations") (hereinafter the refinancing of the Refunded Obligations shall be referred to as the "Refunding");

WHEREAS, the City Council hereby finds and determines that the Project is within the City's power to undertake and therefore serves a "public purpose" as that term is defined in Section 67.04(1)(b), Wisconsin Statutes;

WHEREAS, the City Council deems it to be necessary, desirable and in the best interest of the City to refund the Refunded Obligations for the purpose of providing permanent financing for the projects financed by the Refunded Obligations;

WHEREAS, the City is authorized by the provisions of Section 67.12(12), Wisconsin Statutes, to borrow money and issue general obligation promissory notes for such public purposes and to refinance its outstanding obligations;

WHEREAS, it is the finding of the City Council that it is necessary, desirable and in the best interest of the City to authorize the issuance of and to sell such general obligation promissory notes (the "Notes") to Robert W. Baird & Co. Incorporated (the "Purchaser");

WHEREAS, the Purchaser intends to submit a note purchase proposal to the City (the "Proposal") offering to purchase the Notes in accordance with the terms and conditions to be set forth in the Proposal; and

WHEREAS, in order to facilitate the sale of the Notes to the Purchaser in a timely manner, the City Council hereby finds and determines that it is necessary, desirable and in the best interest of the City to delegate to the City Manager or the City Clerk/Treasurer/Finance Director (each, an "Authorized Officer") the authority to accept the Proposal on behalf of the City so long as the Proposal meets the terms and conditions set forth in this Resolution by executing a certificate in substantially the form attached hereto as Exhibit A and incorporated herein by this reference (the "Approving Certificate").

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City that:

Section 1. Authorization and Sale of the Notes; Parameters. For the purpose of paying the cost of the Project and the Refunding, there shall be borrowed pursuant to Section 67.12(12), Wisconsin Statutes, the principal sum of not to exceed SEVEN MILLION DOLLARS (\$7,000,000) from the Purchaser upon the terms and subject to the conditions set forth in this Resolution. Subject to satisfaction of the condition set forth in Section 16 of this Resolution, the City Manager and City Clerk are hereby authorized, empowered and directed to make, execute, issue and sell to the Purchaser for, on behalf of and in the name of the City, the Notes aggregating the principal amount of not to exceed SEVEN MILLION DOLLARS (\$7,000,000). The purchase price to be

paid to the City for the Notes shall not be less than 97.25% of the principal amount of the Notes and the difference between the initial public offering price of the Notes provided by the Purchaser and the purchase price to be paid to the City by the Purchaser shall not exceed 2.75% of the principal amount of the Notes, with an amount not to exceed 1.25% of the principal amount of the Notes representing the Purchaser's compensation.

Section 2. Terms of the Notes. The Notes shall be designated "General Obligation Promissory Notes"; shall be issued in the aggregate principal amount of up to \$7,000,000; shall be dated as of their date of issuance, which shall be on or after February 1, 2026 if there is a February 1, 2046 maturity; shall be in the denomination of \$5,000 or any integral multiple thereof; shall be numbered R-1 and upward; and shall mature or be subject to mandatory redemption on the dates and in the principal amounts set forth below, provided that the principal amount of each maturity or mandatory redemption amount may be increased or decreased by up to \$400,000 per maturity or mandatory redemption amount; that a maturity or mandatory redemption payment may be eliminated if the amount of such maturity or mandatory redemption payment set forth in the schedule below is less than or equal to \$400,000; and that the aggregate principal amount of the Notes shall not exceed \$7,000,000. The schedule below assumes the Notes are issued in the aggregate principal amount of \$7,000,000.

<u>Date</u>	<u>Principal Amount</u>
February 1, 2028	\$250,000
February 1, 2029	285,000
February 1, 2030	365,000
February 1, 2031	385,000
February 1, 2032	400,000
February 1, 2033	410,000
February 1, 2034	425,000
February 1, 2035	450,000
February 1, 2036	475,000
February 1, 2037	375,000
February 1, 2038	390,000
February 1, 2039	410,000
February 1, 2040	425,000
February 1, 2041	450,000
February 1, 2042	465,000
February 1, 2043	485,000
February 1, 2044	175,000
February 1, 2045	180,000
February 1, 2046	200,000

Interest shall be payable semi-annually on February 1 and August 1 of each year commencing on February 1, 2027, or on such other date approved by the Authorized Officer in the Approving Certificate. The true interest cost on the Notes shall not exceed 5.00%. Interest shall be computed upon the basis of a 360-day year of twelve 30-day months and will be rounded pursuant to the rules of the Municipal Securities Rulemaking Board.

Section 3. Redemption Provisions. The Notes shall not be subject to optional redemption or shall be callable as set forth in the Approving Certificate. If the Proposal specifies that certain of the Notes shall be subject to mandatory redemption, the terms of such mandatory redemption shall be set forth in an attachment to the Approving Certificate labeled as Schedule MRP. Upon the optional redemption of any of the Notes subject to mandatory redemption, the principal amount of such Notes so redeemed shall be credited against the mandatory redemption payments established in the Approving Certificate in such manner as the City shall direct.

Section 4. Form of the Notes. The Notes shall be issued in registered form and shall be executed and delivered in substantially the form attached hereto as Exhibit B and incorporated herein by this reference.

Section 5. Tax Provisions.

(A) Direct Annual Irrepealable Tax Levy. For the purpose of paying the principal of and interest on the Notes as the same becomes due, the full faith, credit and resources of the City are hereby irrevocably pledged, and there is hereby levied upon all of the taxable property of the City a direct annual irrepealable tax in the years 2026 through 2045 for the payments due in the years 2027 through 2046 in the amounts as are sufficient to meet the principal and interest payments when due. The amount of tax levied in the year 2026 shall be the total amount of debt service due on the Notes in the years 2026, if any, and 2027; provided that there is debt service due on the Notes in 2026 and that the amount of such tax carried onto the tax rolls shall be abated by any amounts appropriated pursuant to subsection (D) below which are applied to payment of interest on the Notes in the year 2026.

(B) Tax Collection. So long as any part of the principal of or interest on the Notes remains unpaid, the City shall be and continue without power to repeal such levy or obstruct the collection of said tax until all such payments have been made or provided

for. After the issuance of the Notes, said tax shall be, from year to year, carried onto the tax roll of the City and collected in addition to all other taxes and in the same manner and at the same time as other taxes of the City for said years are collected, except that the amount of tax carried onto the tax roll may be reduced in any year by the amount of any surplus money in the Debt Service Fund Account created below.

(C) Additional Funds. If at any time there shall be on hand insufficient funds from the aforesaid tax levy to meet principal and/or interest payments on said Notes when due, the requisite amounts shall be paid from other funds of the City then available, which sums shall be replaced upon the collection of the taxes herein levied.

(D) Appropriation. To the extent necessary, if any, the City hereby appropriates from taxes levied in anticipation of the issuance of the Notes, proceeds of the Notes or other funds of the City on hand a sum sufficient to be irrevocably deposited in the segregated Debt Service Fund Account created below and used to pay interest on the Notes coming due in 2026, if any, as may be set forth in an attachment to the Approving Certificate labeled as Schedule III.

Section 6. Segregated Debt Service Fund Account.

(A) Creation and Deposits. There shall be and there hereby is established in the treasury of the City, if one has not already been created, a debt service fund, separate and distinct from every other fund, which shall be maintained in accordance with generally accepted accounting principles. Debt service or sinking funds established for obligations previously issued by the City may be considered as separate and distinct accounts within the debt service fund.

Within the debt service fund, there hereby is established a separate and distinct account designated as the "Debt Service Fund Account for General Obligation Promissory Notes - 2026" (the "Debt Service Fund Account") and such account shall be maintained until the indebtedness evidenced by the Notes is fully paid or otherwise extinguished. There shall be deposited into the Debt Service Fund Account (i) all accrued interest received by the City at the time of delivery of and payment for the Notes; (ii) any premium not used for the Refunding which may be received by the City above the par value of the Notes and accrued interest thereon; (iii) all money raised by the taxes herein levied and any amounts appropriated for the specific purpose of meeting principal of and interest on the Notes when due; (iv) such other sums as may be necessary at any time to pay principal of and interest on the Notes when due; (v) surplus monies in the Borrowed Money Fund as specified below; and (vi) such further deposits as may be required by Section 67.11, Wisconsin Statutes.

(B) Use and Investment. No money shall be withdrawn from the Debt Service Fund Account and appropriated for any purpose other than the payment of principal of and interest on the Notes until all such principal and interest has been paid in full and the Notes canceled; provided (i) the funds to provide for each payment of principal of and interest on the Notes prior to the scheduled receipt of taxes from the next succeeding tax collection may be invested in direct obligations of the United States of America maturing in time to make such payments when they are due or in other investments permitted by law; and (ii) any funds over and above the amount of such principal and interest payments on the Notes may be used to reduce the next succeeding tax levy, or may, at the option of the City, be invested by purchasing the Notes as permitted by and subject to Section 67.11(2)(a), Wisconsin Statutes, or in permitted municipal investments under the pertinent provisions of the Wisconsin Statutes ("Permitted Investments"), which investments shall continue to be a part of the Debt Service Fund Account. Any investment of the Debt Service Fund Account shall at all times conform with the provisions of the Internal Revenue Code of 1986, as amended (the "Code") and any applicable Treasury Regulations (the "Regulations").

(C) Remaining Monies. When all of the Notes have been paid in full and canceled, and all Permitted Investments disposed of, any money remaining in the Debt Service Fund Account shall be transferred and deposited in the general fund of the City, unless the City Council directs otherwise.

Section 7. Proceeds of the Notes; Segregated Borrowed Money Fund. The proceeds of the Notes (the "Note Proceeds") (other than any premium not used for the Refunding and accrued interest which must be paid at the time of the delivery of the Notes into the Debt Service Fund Account created above) shall be deposited into a special fund (the "Borrowed Money Fund") separate and distinct from all other funds of the City and disbursed solely for the purpose or purposes for which borrowed. Monies in the Borrowed Money Fund may be temporarily invested in Permitted Investments. Any monies, including any income from Permitted Investments, remaining in the Borrowed Money Fund after the purpose or purposes for which the Notes have been issued have been accomplished, and, at any time, any monies as are not needed and which obviously thereafter cannot be needed for such purpose(s) shall be deposited in the Debt Service Fund Account.

Section 8. No Arbitrage. All investments made pursuant to this Resolution shall be Permitted Investments, but no such investment shall be made in such a manner as would cause the Notes to be "arbitrage bonds" within the meaning of Section 148 of the Code or the Regulations and an officer of the City, charged with the responsibility for issuing the Notes, shall certify as to facts, estimates, circumstances and reasonable expectations in existence on the date of delivery of the Notes to the Purchaser which will permit the conclusion that the Notes are not "arbitrage bonds," within the meaning of the Code or Regulations.

Section 9. Compliance with Federal Tax Laws. (a) The City represents and covenants that the projects financed by the Notes and by the Refunded Obligations and the ownership, management and use of the projects will not cause the Notes or the Refunded Obligations to be "private activity bonds" within the meaning of Section 141 of the Code. The City further covenants that it shall comply with the provisions of the Code to the extent necessary to maintain the tax-exempt status of the interest on the Notes including, if applicable, the rebate requirements of Section 148(f) of the Code. The City further covenants that it will not take any action, omit to take any action or permit the taking or omission of any action within its control (including, without limitation, making or permitting any use of the proceeds of the Notes) if taking, permitting or omitting to take such action would cause any of

the Notes to be an arbitrage bond or a private activity bond within the meaning of the Code or would otherwise cause interest on the Notes to be included in the gross income of the recipients thereof for federal income tax purposes. The City Clerk or other officer of the City charged with the responsibility of issuing the Notes shall provide an appropriate certificate of the City certifying that the City can and covenanting that it will comply with the provisions of the Code and Regulations.

(b) The City also covenants to use its best efforts to meet the requirements and restrictions of any different or additional federal legislation which may be made applicable to the Notes provided that in meeting such requirements the City will do so only to the extent consistent with the proceedings authorizing the Notes and the laws of the State of Wisconsin and to the extent that there is a reasonable period of time in which to comply.

Section 10. Designation as Qualified Tax-Exempt Obligations. The Notes are hereby designated as "qualified tax-exempt obligations" for purposes of Section 265 of the Code, relating to the ability of financial institutions to deduct from income for federal income tax purposes, interest expense that is allocable to carrying and acquiring tax-exempt obligations.

Section 11. Execution of the Notes; Closing; Professional Services. The Notes shall be issued in printed form, executed on behalf of the City by the manual or facsimile signatures of the City Manager and City Clerk, authenticated, if required, by the Fiscal Agent (defined below), sealed with its official or corporate seal, if any, or a facsimile thereof, and delivered to the Purchaser upon payment to the City of the purchase price thereof, plus accrued interest to the date of delivery (the "Closing"). The facsimile signature of either of the officers executing the Notes may be imprinted on the Notes in lieu of the manual signature of the officer but, unless the City has contracted with a fiscal agent to authenticate the Notes, at least one of the signatures appearing on each Note shall be a manual signature. In the event that either of the officers whose signatures appear on the Notes shall cease to be such officers before the Closing, such signatures shall, nevertheless, be valid and sufficient for all purposes to the same extent as if they had remained in office until the Closing. The aforesaid officers are hereby authorized and directed to do all acts and execute and deliver the Notes and all such documents, certificates and acknowledgements as may be necessary and convenient to effectuate the Closing. The City hereby authorizes the officers and agents of the City to enter into, on its behalf, agreements and contracts in conjunction with the Notes, including but not limited to agreements and contracts for legal, trust, fiscal agency, disclosure and continuing disclosure, and rebate calculation services. Any such contract heretofore entered into in conjunction with the issuance of the Notes is hereby ratified and approved in all respects.

Section 12. Payment of the Notes; Fiscal Agent or Mandatory Redemption Agent. The principal of and interest on the Notes shall be paid by the City Clerk/Treasurer/Finance Director (the "Fiscal Agent"). If deemed necessary, the City hereby authorizes the City Manager and City Clerk or other appropriate officers of the City to enter into either a fiscal agency agreement or mandatory redemption agreement with a financial institution to be named in the Approving Certificate.

Section 13. Persons Treated as Owners; Transfer of Notes. The City shall cause books for the registration and for the transfer of the Notes to be kept by the Fiscal Agent. The person in whose name any Note shall be registered shall be deemed and regarded as the absolute owner thereof for all purposes and payment of either principal or interest on any Note shall be made only to the registered owner thereof. All such payments shall be valid and effectual to satisfy and discharge the liability upon such Note to the extent of the sum or sums so paid.

Any Note may be transferred by the registered owner thereof by surrender of the Note at the office of the Fiscal Agent, duly endorsed for the transfer or accompanied by an assignment duly executed by the registered owner or his attorney duly authorized in writing. Upon such transfer, the City Manager and City Clerk shall execute and deliver in the name of the transferee or transferees a new Note or Notes of a like aggregate principal amount, series and maturity and the Fiscal Agent shall record the name of each transferee in the registration book. No registration shall be made to bearer. The Fiscal Agent shall cancel any Note surrendered for transfer.

The City shall cooperate in any such transfer, and the City Manager and City Clerk are authorized to execute any new Note or Notes necessary to effect any such transfer.

Section 14. Record Date. The 15th day of the calendar month next preceding each interest payment date shall be the record date for the Notes (the "Record Date"). Payment of interest on the Notes on any interest payment date shall be made to the registered owners of the Notes as they appear on the registration book of the City at the close of business on the Record Date.

Section 15. Utilization of The Depository Trust Company Book-Entry-Only System. In order to make the Notes eligible for the services provided by The Depository Trust Company, New York, New York ("DTC"), the City agrees to the applicable provisions set forth in the Blanket Issuer Letter of Representations, which the City Clerk or other authorized representative of the City is authorized and directed to execute and deliver to DTC on behalf of the City to the extent an effective Blanket Issuer Letter of Representations is not presently on file in the City Clerk's office.

Section 16. Condition on Issuance and Sale of the Notes. The issuance of the Notes and the sale of the Notes to the Purchaser are subject to approval by an Authorized Officer of the principal amount, definitive maturities, redemption provisions, interest rates and purchase price for the Notes and the redemption date for the Refunded Obligations, which approval shall be evidenced by execution by the Authorized Officer of the Approving Certificate.

The Notes shall not be issued, sold or delivered until this condition is satisfied. Upon satisfaction of this condition, the Authorized Officer is authorized to execute a Proposal with the Purchaser providing for the sale of the Notes to the Purchaser.

Section 17. Official Statement. The City Council hereby directs the Authorized Officer to approve the Preliminary Official Statement with respect to the Notes and deem the Preliminary Official Statement as "final" as of its date for purposes of SEC Rule 15c2-12 promulgated by the Securities and Exchange Commission pursuant to the Securities and Exchange Act of 1934 (the

"Rule"). All actions taken by the Authorized Officer or other officers of the City in connection with the preparation of such Preliminary Official Statement and any addenda to it or final Official Statement are hereby ratified and approved. In connection with the Closing, the appropriate City official shall certify the Preliminary Official Statement and any addenda or final Official Statement. The City Clerk shall cause copies of the Preliminary Official Statement and any addenda or final Official Statement to be distributed to the Purchaser.

Section 18. Undertaking to Provide Continuing Disclosure. The City hereby covenants and agrees, for the benefit of the owners of the Notes, to enter into a written undertaking (the "Undertaking") if required by the Rule to provide continuing disclosure of certain financial information and operating data and timely notices of the occurrence of certain events in accordance with the Rule. The Undertaking shall be enforceable by the owners of the Notes or by the Purchaser on behalf of such owners (provided that the rights of the owners and the Purchaser to enforce the Undertaking shall be limited to a right to obtain specific performance of the obligations thereunder and any failure by the City to comply with the provisions of the Undertaking shall not be an event of default with respect to the Notes).

To the extent required under the Rule, the City Manager and City Clerk, or other officer of the City charged with the responsibility for issuing the Notes, shall provide a Continuing Disclosure Certificate for inclusion in the transcript of proceedings, setting forth the details and terms of the City's Undertaking.

Section 19. Redemption of the Refunded Obligations. The Refunded Obligations are hereby called for prior payment and redemption on such date approved by the Authorized Officer in the Approving Certificate that is not more than 90 days after the date of issuance of the Notes at a price of par plus accrued interest to the date of redemption subject to final approval by the Authorized Officer as evidenced by the execution of the Approving Certificate.

The City hereby directs the City Clerk to work with the Purchaser to cause timely notice of redemption, in substantially the form attached hereto as Exhibit C and incorporated herein by this reference (the "Notice"), to be provided at the times, to the parties and in the manner set forth in the Notice. Any and all actions heretofore taken by the officers and agents of the City to effectuate the redemption of the Refunded Obligations are hereby ratified and approved.

Section 20. Record Book. The City Clerk shall provide and keep the transcript of proceedings as a separate record book (the "Record Book") and shall record a full and correct statement of every step or proceeding had or taken in the course of authorizing and issuing the Notes in the Record Book.

Section 21. Bond Insurance. If the Purchaser determines to obtain municipal bond insurance with respect to the Notes, the officers of the City are authorized to take all actions necessary to obtain such municipal bond insurance. The City Manager and City Clerk are authorized to agree to such additional provisions as the bond insurer may reasonably request and which are acceptable to the City Manager and City Clerk including provisions regarding restrictions on investment of Note proceeds, the payment procedure under the municipal bond insurance policy, the rights of the bond insurer in the event of default and payment of the Notes by the bond insurer and notices to be given to the bond insurer. In addition, any reference required by the bond insurer to the municipal bond insurance policy shall be made in the form of Note provided herein.

Section 22. Conflicting Resolutions; Severability; Effective Date. All prior resolutions, rules or other actions of the City Council or any parts thereof in conflict with the provisions hereof shall be, and the same are, hereby rescinded insofar as the same may so conflict. In the event that any one or more provisions hereof shall for any reason be held to be illegal or invalid, such illegality or invalidity shall not affect any other provisions hereof. The foregoing shall take effect immediately upon adoption and approval in the manner provided by law.

Adopted, approved and recorded December 2, 2025.

Rebecca Houseman City Manager

ATTEST: Michelle A. Ebbert City Clerk

(SEAL)

EXHIBIT A

APPROVING CERTIFICATE

The undersigned [City Manager][City Clerk/Treasurer/Finance Director] of the City of Fort Atkinson, Jefferson County, Wisconsin (the "City"), hereby certifies that:

1. Resolution. On December 2, 2025, the City Council of the City adopted a resolution (the "Resolution") authorizing the issuance and establishing parameters for the sale of not to exceed \$7,000,000 General Obligation Promissory Notes of the City (the "Notes") to Robert W. Baird & Co. Incorporated (the "Purchaser") and delegating to me the authority to approve the Preliminary Official Statement, to approve the purchase proposal for the Notes, and to determine the details for the Notes within the parameters established by the Resolution.
2. Preliminary Official Statement. The Preliminary Official Statement with respect to the Notes is hereby approved and deemed "final" as of its date for purposes of SEC Rule 15c2-12 promulgated by the Securities and Exchange Commission

pursuant to the Securities and Exchange Act of 1934.

3. Proposal; Terms of the Notes. On the date hereof, the Purchaser offered to purchase the Notes in accordance with the terms set forth in the Note Purchase Agreement between the City and the Purchaser attached hereto as Schedule I (the "Proposal"). The Proposal meets the parameters established by the Resolution and is hereby approved and accepted.

The Notes shall be issued in the aggregate principal amount of \$_____, which is not more than the \$7,000,000 approved by the Resolution, and shall mature on February 1 of each of the years and in the amounts and shall bear interest at the rates per annum as set forth in the Pricing Summary attached hereto as Schedule II and incorporated herein by this reference. The amount of each annual principal or mandatory redemption payment due on the Notes is not more than \$400,000 more or less per maturity or mandatory redemption amount than the schedule included in the Resolution as set forth below:

<u>Date</u>	<u>Resolution Schedule</u>	<u>Actual Amount</u>
February 1, 2028	\$250,000	\$_____
February 1, 2029	285,000	_____
February 1, 2030	365,000	_____
February 1, 2031	385,000	_____
February 1, 2032	400,000	_____
February 1, 2033	410,000	_____
February 1, 2034	425,000	_____
February 1, 2035	450,000	_____
February 1, 2036	475,000	_____
February 1, 2037	375,000	_____
February 1, 2038	390,000	_____
February 1, 2039	410,000	_____
February 1, 2040	425,000	_____
February 1, 2041	\$450,000	\$_____
February 1, 2042	465,000	_____
February 1, 2043	485,000	_____
February 1, 2044	175,000	_____
February 1, 2045	180,000	_____
February 1, 2046	200,000	_____

The true interest cost on the Notes is _____%, which is not in excess of 5.00%, as required by the Resolution.

4. Purchase Price of the Notes. The Notes shall be sold to the Purchaser in accordance with the terms of the Proposal at a price of \$_____, plus accrued interest, if any, to the date of delivery of the Notes, which is not less than 97.25% of the principal amount of the Notes, as required by the Resolution. The difference between the initial public offering price of the Notes provided by the Purchaser (\$_____) and the purchase price to be paid to the City by the Purchaser (\$_____) is \$_____, or _____% of the principal amount of the Notes, which does not exceed 2.75% of the principal amount of the Notes. The portion of such amount representing Purchaser's compensation is \$_____, or not more than 1.25% of the principal amount of the Notes.
5. Redemption Provisions of the Notes. [The Notes are not subject to optional redemption.][The Notes maturing on February 1, _____ and thereafter are subject to redemption prior to maturity, at the option of the City, on February 1, _____ or on any date thereafter. Said Notes are redeemable as a whole or in part, and if in part, from maturities selected by the City, and within each maturity, by lot (as selected by the Depository), at the principal amount thereof, plus accrued interest to the date of redemption.] [The Proposal specifies that [some of] the Notes are subject to mandatory redemption. The terms of such mandatory redemption are set forth in an attachment hereto as Schedule MRP and incorporated herein by this reference.]

6. Payment of the Notes; [Fiscal Agent];[Mandatory Redemption Agent]. Pursuant to Section 12 of the Resolution, Associated Trust Company, National Association is named [fiscal][mandatory redemption] agent for the Notes.]

7. Direct Annual Irrepealable Tax Levy. For the purpose of paying the principal of and interest on the Notes as the same respectively falls due, the full faith, credit and taxing powers of the City have been irrevocably pledged and there has been levied on all of the taxable property in the City, pursuant to the Resolution, a direct, annual irrepealable tax in an amount and at the times sufficient for said purpose. Such tax shall be for the years and in the amounts set forth on the debt service schedule attached hereto as Schedule III.

8. Redemption of the 2024B Notes. In the Resolution, the City Council authorized the redemption of the Note Anticipation Notes, Series 2024B, dated March 1, 2024 (the "2024B Notes") and granted me the authority to determine the redemption date. The 2024B Notes shall be redeemed on _____, which is not more than 90 days after the date of issuance of the Notes.

9. Approval. This Certificate constitutes my approval of the Proposal, and the principal amount, definitive maturities, interest rates, purchase price and redemption provisions for the Notes, redemption date for the 2024B Notes and the direct annual irrepealable tax levy to repay the Notes, in satisfaction of the parameters set forth in the Resolution.

IN WITNESS WHEREOF, I have executed this Certificate on _____, 20__ pursuant to the authority delegated to me in the Resolution.

Rebecca Houseman City Manager]

OR

Michelle A. Ebbert City Clerk/Treasurer/Finance Director]

SCHEDULE I TO APPROVING CERTIFICATE

Proposal

To be provided by the Purchaser and incorporated into the Certificate.

(See Attached)

SCHEDULE II TO APPROVING CERTIFICATE

Pricing Summary

To be provided by the Purchaser and incorporated into the Certificate.

(See Attached)

SCHEDULE III TO APPROVING CERTIFICATE

Debt Service Schedule and Irrepealable Tax Levies

To be provided by the Purchaser and incorporated into the Certificate.

(See Attached)

[SCHEDULE MRP TO APPROVING CERTIFICATE

Mandatory Redemption Provision

The Notes due on February 1, ____, ____, and ____ (the "Term Bonds") are subject to mandatory redemption prior to maturity by lot (as selected by the Depository) at a redemption price equal to One Hundred Percent (100%) of the principal amount to be redeemed plus accrued interest to the date of redemption, from debt service fund deposits which are required to be made in amounts sufficient to redeem on February 1 of each year the respective amount of Term Bonds specified below:

For the Term Bonds Maturing on February 1, 20__

Redemption	
Date	Amount
_____	\$ _____
_____	_____
_____	_____ (maturity)

For the Term Bonds Maturing on February 1, 20__

Redemption	
Date	Amount

 _____ (maturity)

For the Term Bonds Maturing on February 1, 20

Redemption
Date Amount

 _____ (maturity)

For the Term Bonds Maturing on February 1, 20

Redemption
Date Amount

 _____ (maturity)]

EXHIBIT B

(Form of Note)

UNITED STATES OF AMERICA

REGISTERED

STATE OF WISCONSIN

DOLLARS

JEFFERSON COUNTY

NO. R-____

CITY OF FORT ATKINSON

\$ _____

GENERAL OBLIGATION PROMISSORY NOTE

MATURITY DATE:

ORIGINAL DATE OF ISSUE:

INTEREST RATE:

CUSIP:

February 1, _____

_____%

DEPOSITORY OR ITS NOMINEE NAME: CEDE & CO.

PRINCIPAL AMOUNT: _____ THOUSAND DOLLARS (\$ _____)

FOR VALUE RECEIVED, the City of Fort Atkinson, Jefferson County, Wisconsin (the "City"), hereby acknowledges itself to owe and promises to pay to the Depository or its Nominee Name (the "Depository") identified above (or to registered assigns), on the maturity date identified above, the principal amount identified above, and to pay interest thereon at the rate of interest per annum identified above, all subject to the provisions set forth herein regarding redemption prior to maturity. Interest shall be payable semi-annually on February 1 and August 1 of each year commencing on [February 1, 2027] until the aforesaid principal amount is paid in full. Both the principal of and interest on this Note are payable to the registered owner in lawful money of the United States. Interest payable on any interest payment date shall be paid by wire transfer to the Depository in whose name this Note is registered on the Bond Register maintained by [the City Clerk/Treasurer/Finance Director][Associated Trust Company, National Association] (the "Fiscal Agent") or any successor thereto at the close of business on the 15th day of the calendar month next preceding each interest payment date (the "Record Date"). This Note is payable as to principal upon presentation and surrender hereof at the office of the Fiscal Agent.

For the prompt payment of this Note together with interest hereon as aforesaid and for the levy of taxes sufficient for that purpose, the full faith, credit and resources of the City are hereby irrevocably pledged.

This Note is one of an issue of Notes aggregating the principal amount of \$ _____, all of which are of like tenor, except as to denomination, interest rate[, redemption provision] and maturity date, issued by the City pursuant to the provisions of Section 67.12(12), Wisconsin Statutes, for public purposes, including paying the cost of projects included in the City's 2026-2027 capital improvement plan; and refunding certain outstanding obligations of the City, as authorized by a resolution adopted on December 2, 2025, as supplemented by an Approving Certificate, dated _____, _____ [(the "Approving Certificate")] (collectively, the "Resolution"). Said Resolution is recorded in the official minutes of the City Council for said date.

[This Note is not subject to optional redemption.]

[The Notes maturing on February 1, _____ and thereafter are subject to redemption prior to maturity, at the option of the City, on February 1, _____ or on any date thereafter. Said Notes are redeemable as a whole or in part, and if in part, from maturities selected by the City, and within each maturity, by lot (as selected by the Depository), at the principal amount thereof, plus accrued interest to the date of redemption.]

[The Notes maturing in the years _____ are subject to mandatory redemption by lot as provided in the Approving Certificate, at the redemption price of par plus accrued interest to the date of redemption and without premium.]

[In the event the Notes are redeemed prior to maturity, as long as the Notes are in book-entry-only form, official notice of the redemption will be given by mailing a notice by registered or certified mail, overnight express delivery, facsimile transmission, electronic transmission or in any other manner required by the Depository, to the Depository not less than thirty (30) days nor more than sixty (60) days prior to the redemption date. If less than all of the Notes of a maturity are to be called for redemption, the Notes of such maturity to be redeemed will be selected by lot. Such notice will include but not be limited to the following: the designation, date and maturities of the Notes called for redemption, CUSIP numbers, and the date of redemption. Any notice provided as described herein shall be conclusively presumed to have been duly given, whether or not the registered owner receives the notice. The Notes shall cease to bear interest on the specified redemption date provided that federal or other immediately available funds sufficient for such redemption are on deposit at the office of the Depository at that time. Upon such deposit of funds for redemption the Notes shall no longer be deemed to be outstanding.]

It is hereby certified and recited that all conditions, things and acts required by law to exist or to be done prior to and in connection with the issuance of this Note have been done, have existed and have been performed in due form and time; that the aggregate indebtedness of the City, including this Note and others issued simultaneously herewith, does not exceed any limitation imposed by law or the Constitution of the State of Wisconsin; and that a direct annual irrevocable tax has been levied sufficient to pay this Note, together with the interest thereon, when and as payable.

This Note has been designated by the City Council as a "qualified tax-exempt obligation" pursuant to the provisions of Section 265(b)(3) of the Internal Revenue Code of 1986, as amended.

This Note is transferable only upon the books of the City kept for that purpose at the office of the Fiscal Agent, only in the event that the Depository does not continue to act as depository for the Notes, and the City appoints another depository, upon surrender of the Note to the Fiscal Agent, by the registered owner in person or his duly authorized attorney, together with a written instrument of transfer (which may be endorsed hereon) satisfactory to the Fiscal Agent duly executed by the registered owner or his duly authorized attorney. Thereupon a new fully registered Note in the same aggregate principal amount shall be issued to the new depository in exchange therefor and upon the payment of a charge sufficient to reimburse the City for any tax, fee or other governmental charge required to be paid with respect to such registration. The Fiscal Agent shall not be obliged to make any transfer of the Notes [(i)] after the Record Date[, (ii) during the fifteen (15) calendar days preceding the date of any publication of notice of any proposed redemption of the Notes, or (iii) with respect to any particular Note, after such Note has been called for redemption]. The Fiscal Agent and City may treat and consider the Depository in whose name this Note is registered as the absolute owner hereof for the purpose of receiving payment of, or on account of, the principal or redemption price hereof and interest due hereon and for all other purposes whatsoever. The Notes are issuable solely as negotiable, fully-registered Notes without coupons in the denomination of \$5,000 or any integral multiple thereof.

[This Note shall not be valid or obligatory for any purpose until the Certificate of Authentication hereon shall have been signed by the Fiscal Agent.]

No delay or omission on the part of the owner hereof to exercise any right hereunder shall impair such right or be considered as a waiver thereof or as a waiver of or acquiescence in any default hereunder.

IN WITNESS WHEREOF, the City of Fort Atkinson, Jefferson County, Wisconsin, by its governing body, has caused this Note to be executed for it and in its name by the manual or facsimile signatures of its duly qualified City Manager and City Clerk; and to be sealed with its official or corporate seal, if any, all as of the original date of issue specified above.

CITY OF FORT ATKINSON

JEFFERSON COUNTY, WISCONSIN

By: Rebecca Houseman City Manager
(SEAL)

By: Michelle A. Ebbert City Clerk

[Date of Authentication: _____, _____.]

CERTIFICATE OF AUTHENTICATION

This Note is one of the Notes of the issue authorized by the within-mentioned Resolution of the City of Fort Atkinson, Jefferson County, Wisconsin.

ASSOCIATED TRUST COMPANY, NATIONAL ASSOCIATION

By _____

Authorized Signatory]

ASSIGNMENT

FOR VALUE RECEIVED, the undersigned sells, assigns and transfers unto

(Name and Address of Assignee)

(Social Security or other Identifying Number of Assignee)

the within Note and all rights thereunder and hereby irrevocably constitutes and appoints

_____, Legal Representative, to transfer said Note on the books kept for registration thereof, with full power of substitution in the premises.

Dated: _____
Signature Guaranteed: _____

(e.g. Bank, Trust Company
or Securities Firm)

(Depository or Nominee Name)

NOTICE: This signature must correspond with the name of the Depository or Nominee Name as it appears upon the face of the within Note in every particular, without alteration or enlargement or any change whatever.

(Authorized Officer)

EXHIBIT C

NOTICE OF FULL CALL*

Regarding

CITY OF FORT ATKINSON

JEFFERSON COUNTY, WISCONSIN

NOTE ANTICIPATION NOTES, SERIES 2024B,

DATED MARCH 1, 2024 (the "Notes")

NOTICE IS HEREBY GIVEN that the Notes of the above-referenced issue which mature on the date and in the amount; bear interest at the rate; and have a CUSIP No. as set forth below have been called by the City for prior payment on _____, ____ at a redemption price equal to 100% of the principal amount thereof plus accrued interest to the date of prepayment:

<u>Maturity Date</u>	<u>Principal Amount</u>	<u>Interest Rate</u>	<u>CUSIP No.</u>
February 1, 2027	\$3,500,000	5.00%	346748QB5

The City shall deposit federal or other immediately available funds sufficient for such redemption at the office of The Depository Trust Company on or before _____, ____.

Said Notes will cease to bear interest on _____, ____.

By Order of the

City Council

City of Fort Atkinson

City Clerk

Dated _____

* To be provided by registered or certified mail, overnight express delivery, facsimile transmission, electronic transmission or in any other manner required by The Depository Trust Company, to The Depository Trust Company, Attn: Supervisor, Call Notification Department, 570 Washington Blvd., Jersey City, NJ 07310, not less than thirty (30) days nor more than sixty (60) days prior to _____, ____ and to the MSRB electronically through the Electronic Municipal Market Access (EMMA) System website at www.emma.msrb.org.

9. Reports of Officers, Boards, and Committees

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

No action was taken.

10. Unfinished Business

None.

11. New Business

a. Review and possible action relating to the purchase of **DS300 Ballot Tabulators** for Elections (Ebbert, Clerk/Treasurer/Finance Director)

Clerk Ebbert discussed ballot tabulating machines, DS200s that are used for elections in the

City and adding that not every municipality uses the same type of voting equipment. State law grants a certain amount of leeway relating to the use of voting equipment, with decisions ultimately up to the County and Municipal Clerks. Jefferson County has traditionally offered financial support for the purchase of tabulating equipment. The current tabulators, DS200s, were initially purchased by Jefferson County in 2012. In August 2025, staff was notified by the Jefferson County Clerk's office of the need to upgrade these tabulators. The new machines, DS300s, provide enhancements to processing, security, and stability. The DS200 tabulators served the City of Fort Atkinson and Jefferson County well for the last 13 years, and staff anticipates the life of the new DS300 model to be similar in length. The DS300 looks similar to and operates in a similar way as the DS200. Staff does not anticipate that voters will notice the difference or have difficulty inserting ballots into the new machines. Staff anticipates that the DS300 tabulators will be ready for use starting with the February 2026 election. The 2026 City of Fort Atkinson CIP includes \$25,000 for election equipment upgrades, materials, and supplies, which includes the cost of three DS300 tabulators. The County's plan to upgrade to the DS300s in 2026 aligns well with the City's CIP. Jefferson County will pay for 50% of the DS300s for every municipality in Jefferson County. The City's remaining portion for three machines is \$10,185.00 or \$3,395.00 per machine. General Ledger account 16-60-0061-4100 - CT Elections 2026 is the CIP account designated for the expenses, as approved with the 2026 Budget and CIP.

Lescohier moved, seconded by Schultz to authorize the payment to Jefferson County for the purchase of DS300 Ballot Tabulators for elections at a cost not to exceed \$10,185. Motion carried.

b. *Review and possible action relating to the purchase of **Gymnasium Floor Covering** for Elections (Ebbert, Clerk/Treasurer/Finance Director)*

Clerk Ebbert shared that the municipal gymnasium floor was finished to its current state in 1994. This space is used daily, whether for fitness classes, youth center, open gym, pickleball or private events. Staff maintains the floor with weekly buffing and annual waxing. Protecting the gym floor is essential for preserving the long-term value, safety, and appearance. The floor mats currently in use were purchased in the 1990s and have long served to protect the facility during community events. Park staff regularly deploy the mats for youth programs, elections, and fundraisers. However, after decades of use, the mats have absorbed countless spills, have small rips and wrinkles, and now pose significant safety risks. On April 4, 2025, following a voter falling during the April election, staff obtained a quote from Practice Sports to support planning for the 2026 budget. The company reaffirmed that same quote in November, with no price increase. Staff reached out to seek quotes as required, but responses were not received. Further search for vendors online linked back to the Practice Sports website. General Ledger account 16-60-0061-4100 - CT Elections 2026 is the CIP account designated for the expenses, page 198 of the 2026 Budget. The Capital Improvement Plan, approved on November 18, 2025 included \$25,000 for election upgrades and expenses.

Huckabee moved, seconded by Johnson to approve the purchase of gymnasium floor coverings for elections at a cost not to exceed \$12,863.25. Motion carried.

- c. *Review and possible action relating to **Construction Administration Services fees for the 2025 water relay and road rehabilitation project** (Navin, Director of Public Works)*

Director Navin reminded the council that on February 20, 2025, they approved Task Order 2025-03, which included an estimated cost for Construction Administration service fees associated with the 2025 Water Relay and Road Rehabilitation Project with Ruekert & Mielke for \$127,150.60. This work is now wrapping up and final costs have been tallied. The initial estimate for this work was \$127,150.60 and these items added up to a final cost of \$189,887.00. The cost difference is \$62,736.40 with \$3,500.00 being reimbursed by Fort Health Care. The cost overages will be split between the Water, Storm, and Sanitary Utilities as well as the Transportation Fund (Fund 5). The overall impacts of these additional charges for funds such as Fund 5 that are static means that there will be \$33,313 less work completed in future years to cover this cost.

Schultz moved, seconded by Johnson to approve the final cost for Construction Administration for the 2025 Water Main and Roadway Rehabilitation project of \$189,887. Motion carried.

- d. *Review and possible action relating to a contract for construction administration services with MSA for the **2026 S. Main Pedestrian Path Project** (Navin, Director of Public Works)*

Director Navin discussed that the City Council approved a contract for the design of the S. Main St. Pedestrian Path and road reconstruction work for 2026 with MSA Professional Services, Inc on March 5, 2024. The design has been completed, and the project bid out for construction. The City Council awarded the construction contract to Rock Road Companies, Inc. on September 16, 2025, in the amount of \$2,723,030.53. Road construction projects require construction administration and oversight by the "owner." The City of Fort Atkinson is the owner of this public infrastructure project. In the past, the City has used City staff, consultants, or a combination thereof to accomplish this task. The City does not currently have staff with the capacity or experience to effectively oversee this construction project.

Schultz moved, seconded by Lescohier to approve the contract for construction administration services with MSA for the 2026 S. Main Street Pedestrian Path Project at a cost not to exceed \$155,000 and authorize the City Manager to execute the contract. Motion carried.

- e. *Review and possible action relating to **Police Department squad car purchase, equipment and upfitting order for 2026** (Bump, Police Chief)*

Captain Hefty provided, the Department is set to replace one (1) police vehicle in 2026. Funds are established in the 2026 Budget under the Police Outlay Account in the amount of \$71,500.00. The Police Department requested bids for the 2026 Ford Interceptor SUV. Through the bid process, staff received bids from Ewald Ford and Griffin Ford. Ewald Commercial Vehicle Services was awarded the Wisconsin State contract for 2026 Ford Squad cars. Their price was the lowest bid of all submitting dealers in the State, and they are the largest fleet provider in Wisconsin. 2026 quote for the Ford SUV: \$45,075.00. A local dealer, Griffin Ford, also provided a competitive quote for the same Ford Interceptor Squad. The local dealer has been a strong contributor for competitive fleet needs in Fort Atkinson over the past 10 years. While Griffin offered a slightly higher price (\$194.00), staff feels that it is beneficial to support a local business, thereby supporting the community. Staff has included the proposal from

Griffin in the total project cost below. The 2026 quote for the Ford SUV is \$45,269.00.

Huckabee moved, seconded by Johnson to approve the purchase of a new squad car from Griffin Ford for \$45,269 from Griffin Ford and to approve the purchase of additional equipment at a cost not to exceed \$26,013.77 to complete the entire squad car transition process. Motion carried.

*f. Review and possible action relating to the repair of the **Fire Department heating and ventilation system** at a cost not to exceed \$9,865 (Peterson, Fire Chief)*

Chief Peterson said the station's HVAC heating system has experienced ongoing operational issues for an extended period of time. Fire Department personnel have made efforts to keep the system running through internal adjustments and temporary fixes. The system is becoming increasingly unreliable, often shutting down and leaving the living and administrative areas with no heat until reset. Ahern's provided a repair estimate of \$9,865 dollars to address the inverter board, compressor replacement, and refrigerant leak. They also provided a separate annual maintenance quote of \$7,250 dollars, largely due to the complexity of the system design and the difficulty in accessing the multiple separate units.

Lescohier moved, seconded by Huckabee to approve the proposal from Ahern to repair the Fire Department's HVAC system at a cost not to exceed \$9,865. Motion carried.

12. Miscellaneous

None.

13. Public Comment for Matters Not on the Agenda

John Hausz, 104 Jefferson Street - spoke on the scheduled workshop for Koshkonong Estates to be held on December 3, 2025. He disagrees with the public only being allowed one question at the workshop.

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)*

Huckabee moved, seconded by Schultz to approve the list of Verified Claims as presented and authorization of payment. Motion carried on a roll call vote.

15. Adjournment

Schultz moved, seconded by Johnson to adjourn. Meeting adjourned at 8:03 pm.

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



**PLAN COMMISSION MEETING
IN PERSON AND VIA ZOOM
TUESDAY, DECEMBER 9, 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: Chairperson Manager Houseman, Director of Public Works Navin, Council Representative Schultz, Commissioners Kessenich, Shull and Ciccarelli. Also present: City Clerk/Treasurer/Finance Director Ebbert and Director of Neighborhood and Building Services Draeger.

3. New Business

*a. Review and possible action relating to the **minutes of the November 25, 2025 Plan Commission meeting** (Ebbert, Clerk/Treasurer/Finance Director)*

Schultz moved, seconded by Shull to approve the minutes of the November 25, 2025 Plan Commission meeting. Motion carried.

*b. Review and possible recommendation to the City Council relating to an **Extraterritorial Certified Survey Map** for the property located at W6116 Star School Road in the Town of Koshkonong (CSM-2025-13) (Draeger, Director of Neighborhood and Building Services)*

Director Draeger stated the property owner would like to break off a 2 acre parcel from the parent parcel along Star School Road in the Town of Koshkonong without road right of way. This is within the 3-mile extraterritorial area of the City of Fort Atkinson and also within the 1.5-mile radius requiring a recommendation from the Plan Commission and approval by the City Council. The owner received approval from Jefferson County on January 1, 2025 to rezone the parcel from A-1 to A-3, pending approval of the CSM. The parcel is located outside the City's Potential Long-Range Urban Growth Area. Evan and Kate Karrow are requesting to create a new 2-acre parcel and rezone it from the current A-1 designation to A-3, allowing for the construction of a new residence. The proposed division would separate the 2-acre parcel from the existing 37.67-acre parcel, which is currently vacant land. Staff does not anticipate that this land division will negatively affect the City's long-range growth plans. Staff find that the proposed Certified Survey Map is consistent with the requirements of the City's Land Division and Development Ordinance, except for the dedication of public right-of-way along Star School Road. The Town of

Koshkonong and the Jefferson County Zoning Department do not intend to require the dedication.

Schultz moved, seconded by Ciccarrelli to recommend the City Council approve the Extraterritorial Certified Survey Map, and waive the requirement for the road dedication for the property located at W6116 Star School Road in the Town of Koshkonong. subject to the edits noted by the Director of Neighborhood Services to be added to the CSM. Motion carried.

c. Update on previously approved projects (Houseman)

Manager Houseman provided updates on various projects. No action was taken.

4. Adjournment

Kessenich moved, seconded by Ciccarelli to adjourn. Meeting adjourned at 4:19 pm.

Respectfully submitted

Michelle Ebbert

City Clerk/Treasurer/Finance Director



**TRANSPORTATION & TRAFFIC REVIEW COMMITTEE MEETING
IN PERSON AND VIA ZOOM
THURSDAY, DECEMBER 11, 2025 – 2:00 PM
CITY HALL – SECOND FLOOR**

MINUTES

1. Call meeting to order

Chairperson Navin called the meeting to order at 2:00 p.m.

2. Roll call

Members Present: Chairperson Navin, Superintendent Williamson, Council Representative Jaeckel and School District Representative Moehling. Absent: City Electrician Nick Armstrong. Also present: Manager Houseman and Public Relations Executive Assistant Weihert.

3. Approval of Minutes

*a. Review and possible action relating to the **minutes of the September 11, 2025, Transportation and Traffic Review Committee.***

Motion to approve the minutes of the September 11, 2025 meeting made by Jaeckel and seconded by Williamson. Motion carried.

4. Parking Requests

*a. Review and possible action relating to a **request for no parking signs at 643 West Hilltop Trail (Navin, Director of Public Works)***

Chairperson Navin discussed, on October 20, 2025, that staff received a request for no parking signs at 643 West Hilltop Trail. The request stated that it is often difficult to get trucks and trailers through this area when vehicles are parked on both sides of the road during events at the Fireside Theatre. City staff monitored the area of concern over a two-week period during the scheduled shows at the Fireside, which are considered busy times for this area. Staff deemed that No Parking signs at this location are not necessary at this time. Williamson made a motion to deny the request, Jaeckel seconded. Motion passes.

5. Speed Limit Reviews

6. Traffic Signal Reviews

- a. *Review and possible action relating to the **pedestrian crossing and traffic signal at S. Third St. and Robert St.** (Navin, Director of Public Works)*

Chairperson Navin discussed that, between November 24 and November 25, staff received three Traffic Review Requests for further review of the crosswalk at S. 3rd St. and Robert St. The notable concerns with all three of the requests received revolve around the crosswalk on the north side of the intersection and the length of time the beacon flashes. The applicants expressed concerns about vehicles driving southbound on Robert St. and not coming to a stop at the 3rd St. intersection before continuing on, as well as vehicles making a right turn onto Robert St. from 3rd St. There is also a concern around the time provided to cross the street for pedestrians. As noted below in the submissions, these concerns stemmed from a pedestrian being hit by a car on October 20, 2025, observed near misses, and general concern for public safety.

Staff recommended that the committee direct staff to conduct an analysis of this intersection and bring forward options and/or recommendations for improvements at the March 12, 2026, Transportation and Traffic Review Committee Meeting. Motion made by Jaeckel seconded by Williamson. Motion carried.

7. Miscellaneous

- a. *Review and possible action relating to a **request for a reduced speed limit on W. Sherman Ave.** (Navin, Director of Public Works)*

Chairperson Navin discussed that, on October 8, 2025, staff received the attached written request for crosswalk stripes at the intersection of W. Sherman Ave. and Jackson St. crossing. The reason stated for the request was due to concerns of speeding vehicles and the number of children present in this area. Police department staff completed a speed survey at the intersection of W. Sherman Ave and Jackson St. Data from the survey was consistent with other similar areas and found that there is a safe average and mode speed aligns with the posted speed limit. It is also not the practice of the Public Works department to stripe every residential crosswalk. It would be cost-prohibitive.

Staff recommends that the request for crosswalk stripes and a crosswalk sign at the intersection of W. Sherman Ave and Jackson St. be denied based on the data provided. Motion made by Williamson seconded by Jaeckel. Motion carried.

8. Transit Items

- a.
- *City submitted the 2026 grant to the state*
 - *Vehicle Updates (City)*

Public Relations Executive Assistant Weihert told the committee the 2026 State grant application was submitted on time.

Recognized Expenses: \$302,400.00
Recognized Revenue: \$158,000.00
Net Operating Deficit: \$144,400.00
Est. Fed + State Funding: \$171,460.80
Est. Local Share: -\$27,060.80

The City opted not to apply for a new vehicle grant in 2026. The City currently owns five vehicles: two older 2011 Dodge Caravans in poor condition, one 2020 Dodge that has been back on the road since the middle of this year after a vehicle crash that left it totaled, and two 2024 Chrysler Voyagers. One of the Chryslers was in a fender-bender in September. It was repaired and is back on the road.

No action was taken.

9. Safe Routes to School

10. Adjournment

Bump moved to adjourn, seconded by Jaeckel, seconded by Williamson. Motion carried.

Meeting adjourned at 2:08 p.m.

Respectfully submitted by
Sarah Weihert, Public Relations Executive Assistant



Permit Report

11/01/2025 - 11/30/2025

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

11/10/2025	25941	35 Wilson Ave	Doug Wisch	Deck	Demo & rebuild 24'x12' deck within existing footprint. Demo & rebuild 5'x5' front stoop/deck.	13,000	\$169.25
							\$169.25

Group Total: 1

Group: Demo/Raze

11/4/2025	25927	1310 and 1320 Campus Dr	Tip of the Spear LLC	Demo/Raze	Remove existing buildings, fill basements with borrow, remove existing trees and restore.	1	\$185.00
							\$185.00

Group Total: 1

Group: Electrical

11/25/2025	25993	408 Curtis Cir	Betty Strese	Electrical	Kitchen remodel	0	\$60.00
11/24/2025	25991	209 W Sherman Ave	Aric Gustafson	Electrical	Wire A/C	955	\$60.00
11/24/2025	25990	535 Berea Dr	Crown of Life Christian Academy	Electrical	Trench power to monument sign	1,000	\$60.00
11/21/2025	25986	1123 Harriette St	RYANN BIXLER	Electrical	NEW SERVICE AND WIRE NEW HOUSE	10,000	\$287.00

11/20/2025	25983	310 Shirley St	Lawonn Trust	Electrical	exhaust fan	600	\$60.00
11/18/2025	25975	900 W Sherman Ave	Brian Draeger	Electrical	Kitchen/Dining Remodel- Relocating (2) lights fixtures. Adding (3) recept/switches, Adding (1) dishwasher circuit, clean up accessible knob & tube wiring	1,700	\$60.00
11/17/2025	25974	710 W Blackhawk Dr	TINA ESSER & BRIAN JUAREZ	Electrical	3 lights, 1 exterior outlet	1,000	\$60.00
11/7/2025	25938	833 N Main St	Michael Farmer	Electrical	Replace vent light heat fan add outlet for bidet by toilet moving vanity light and outlet to other side of bathroom to acomidate new bathroom layout update all switche	1,500	\$60.00
11/7/2025	25937		Sheryl Lawonn	Electrical	Furnace Replacement	5,000	
11/5/2025	25930	213 E Sherman Ave	John Cicarelli	Electrical	rooftop solar	5,300	\$90.00
							\$797.00

Group Total: 10

Group: Erosion Control

11/20/2025	25982	1425 Janesville Ave	true Storage	Erosion Control	Create green space in parking lot per developer agreement and close off highland entrance furnish new concrete sidewalks	60,000	\$155.00
							\$155.00

Group Total: 1

Group: Fence

11/14/2025	25969	1200 Whitewater Ave	Donald Hupke	Fence	20x40x6' tall fenced in area for garbage and recycling dumpsters {metal and cardboard }	4,000	\$60.00
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\$60.00

Group Total: 1

Group: HVAC

11/28/2025	25996	621 Reena Ave #8	Holly Brenner	HVAC	Replace magic pak	8,500	\$70.00
11/18/2025	25976	1356 Marigold Dr.	American Construction	HVAC	HVAC for new single family townhomes - South Building	103,500	\$1,002.25
11/14/2025	25964	209 Merchants Ave	City of Fort Atkinson	HVAC	New RTU: CRANE PICK. ROAD CLOSURE 7 AM - 9 AM, DEC 4	85,000	\$135.00
11/12/2025	25960	337 Foster St	Bobbie Kenedy	HVAC	Furnace Replacement	6,981	\$70.00
11/11/2025	25953	1261 Elsie St.	KURT CHAPMAN	HVAC	REPLACE FURNACE	0	\$70.00
11/11/2025	25952	333 Merchants Ave.	TOM WEIGAND	HVAC	REPLACE 2 FURNACES	0	\$105.00
11/11/2025	25951	1247 Elsie St.	LOU BACHER	HVAC	REPLACE FURNACE	0	\$70.00
11/11/2025	25950	87 Jackson St.	DUANE RIGGS	HVAC	REPLACE FURNACE AND A/C	0	\$105.00
11/11/2025	25949	421 Washington St.	PAULA DABEL	HVAC	REPLACE FURNACE	0	\$70.00
11/11/2025	25948	1512 Rangita St.	DANA DAVIS	HVAC	REPLACE FURNACE	0	\$70.00
11/10/2025	25940	421 Mechanic St	Tim & Jessica Sanchez	HVAC	Replace Furnace and AC	16,708	\$105.00
11/7/2025	25936	310 Shirley St	Sheryl Lawonn	HVAC	Furnace Replacement	5,000	\$70.00
							\$1,942.25

Group Total: 12

Group: New Single Family

11/10/2025	25942	1123 Harriette St	RyAnn Bixler	New Single Family	Rebuild home on existing foundation from burned house - 3'6" expansion of the garage width.	450,000	\$1,185.00
							\$1,185.00

Group Total: 1

Group: Other

11/10/2025	25939	517 Lexington Blvd	Eugene Treptow	Other	addition to driveway	4,000	\$50.00
							\$50.00

Group Total: 1

Group: Plumbing

11/26/2025	25995	408 Curtis Cir	Betty Strese	Plumbing	Kitchen remodel	1,500	\$60.00
11/23/2025	25989	210 S Fourth St E	Amber & Jon Hennessee	Plumbing	replace mixer valve and replace tub/wall unit with new one in same spot	7,000	\$60.00
11/23/2025	25988	634 Short St	Tom & Sue Noel	Plumbing	replace mixer valve in tub area and place liner over existing tub and walls	6,518	\$60.00
11/17/2025	25970	833 N Main St	Michael Farmer	Plumbing	Installing new shower and vanity in existing bathroom	14,660	\$60.00
11/14/2025	25965	900 W Sherman Ave	Brian Draeger	Plumbing	Kitchen Sink, Dishwasher Connection Disposal - MOve Sink Location	1,580	\$60.00
							\$300.00

Group Total: 5

Group: Private Driveway

11/3/2025	25922	339 Merchant Ave	Kate Padock	Private Driveway	Driveway	0	\$50.00
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\$50.00

Group Total: 1

Group: Right of Way Opening Permit

11/21/2025	25987	N 4TH ST & MEMORIAL DR		Right of Way Opening Permit	INSTALL NEW STREET LIGHT POLE WR#5163284	0	
11/20/2025	25984	DA_01	TDS Telecom	Right of Way Opening Permit	boring in ROW, terrace, pulling fiber in 1.25" HDPE conduit	0	
11/20/2025	25981	1425 Janesville Ave Fort Atkinson, WI	True Storage	Right of Way Opening Permit	row permit request for green space conversion of existing parking lot	0	\$50.00
11/20/2025	25980	N1729 MAIN ST		Right of Way Opening Permit	PAVING RELOCATION	0	
11/19/2025	25979		TDS Telecom	Right of Way Opening Permit	48FO, placing 1.25" HDPE conduit, pulling fiber	1,000	
11/19/2025	25978	302 Merchants Ave	St Peters Episcopal Church, contact name is Mark	Right of Way Opening Permit	Replace city sidewalk	1,000	\$50.00
11/17/2025	25973	622 MAPLE ST WR#5145740	Loos Homes	Right of Way Opening Permit	GAS NEW SERVICE	0	\$50.00
11/17/2025	25972	622 MAPLE ST	Loos Homes	Right of Way Opening Permit	NEW ELECTRIC SERVICE WR#5145916	0	\$50.00
11/14/2025	25968		Michael Ferro	Right of Way Opening Permit	City Sidewalk	1,000	\$50.00
11/12/2025	25961	211 S 3rd St. West	Kristin Gray	Right of Way Opening Permit	Driveway apron replacement	1,500	\$100.00

11/12/2025	25959	612 MAPLE ST	Loos Homes	Right of Way Opening Permit	NEW ELECTRIC SERVICE-WR#5145137 & NEW GAS SERVICE-WR#5145158	0	\$50.00
11/12/2025	25958	434 JEFFERSON ST		Right of Way Opening Permit	NEW GAS SERVICE WR#5157344	0	\$50.00
11/11/2025	25955	1341 MARIGOLD DR	Loos custom Homes	Right of Way Opening Permit	GAS NEW SERVICE WR#5153767	0	\$50.00
11/4/2025	25926	700 SCHUMACHER WAY	Habitat For Humanity	Right of Way Opening Permit	INSTALL NEW GAS SERVICE WR#5139020	0	\$50.00
							\$550.00

Group Total: 14

Group: Roofing/Siding

11/26/2025	25994	1417 Montclair Pl	Judith Statz	Roofing/Siding	Shingle replacement	15,000	\$60.00
11/25/2025	25992	160 W Blackhawk Dr	Abilities Inc.	Roofing/Siding	Siding	24,500	\$60.00
11/21/2025	25985	411 W Cramer St	Flor Hernandez	Roofing/Siding	complete roof tear off anf reroofing	19,165	\$60.00
11/18/2025	25977	715 W Sherman Ave	Daryle Brulla	Roofing/Siding	Roof on House and Garage	23,800	\$60.00
11/14/2025	25966	304 S High St	Chad Strommen	Roofing/Siding	Re shingle roof	5,000	\$60.00
11/12/2025	25957	307 Craig St	Josh Knaap	Roofing/Siding	Siding	29,900	\$60.00
11/12/2025	25956	1004 W Sherman Ave	Susan Sullivan	Roofing/Siding	Roofing/Siding/Gutters/Soffit/Fascia	24,600	\$60.00
11/11/2025	25954	707 Oak Hill Ln	Jeffrey W Herriott	Roofing/Siding	Roof Replacement	35,056	\$60.00
11/11/2025	25947	301 S High St.	ST PAULS LUTHERAN	Roofing/Siding	FLAT ROOF	213,820	\$100.00

11/11/2025	25946	371 Cherokee Ln	Steve Nygaard	Roofing/Siding	Roof and Gutter Replacement	27,803	\$60.00
11/11/2025	25945	1201 Aztec Ct	Richard Armstrong	Roofing/Siding	Roof and gutter replacement	19,165	\$60.00
11/11/2025	25944	208 Clarence St	Strong Fox LLC	Roofing/Siding	Replace Garage Roof	3,200	\$60.00
11/11/2025	25943	308 N High St	Fox and Fojut LLC	Roofing/Siding	Replace House Roof	6,800	\$60.00
11/5/2025	25933		Fox and Fojut LLC	Roofing/Siding	Put new roof on house	6,800	
11/5/2025	25931	416 Raintree Dr	Babcock	Roofing/Siding	Reshingle Roof	18,000	\$60.00
11/3/2025	25924	1105 Laurie Dr	Benjamin Dayton	Roofing/Siding	Roofing and Siding	45,000	\$60.00
11/3/2025	25923	512 Van Buren St	Jack and Sandra Kilroy	Roofing/Siding	Re-side back and left/right elevation of house. Re-side left elevation of garage and front of garage.	33,500	\$110.00
							\$1,050.00

Group Total: 17

Group: Sign

11/13/2025	25962	821 Monroe St	Fort Atkinson School District - Lisa Haas	Sign	Install one additional Single faced unlit sign	5,975	\$90.00
							\$90.00

Group Total: 1

Group: Single Family Alteration/Addition

11/17/2025	25971	1605 Jamesway	Bob Bennett	Single Family Alteration/Addition	install egress	6,887	\$64.00
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11/13/2025	25963	900 W Sherman Ave	Brian Draeger	Single Family Alteration/Addition	Kitchen remodel	15,000	\$60.00
11/5/2025	25932	408 Curtis Cir	Betty Strese	Single Family Alteration/Addition	Kitchen Remodel	50,000	\$72.50
11/5/2025	25929	213 E Sherman Ave	John Ciccarelli	Single Family Alteration/Addition	rooftop solar install 18 panels	18,800	\$223.00
							\$419.50

Group Total: 4

Group: Windows/Doors

11/4/2025	25928	316 McMillen St	Emily Gray	Windows/Doors	Replacing 1 3LS, 2 2LS, 2 DH windows same size and location	5,525	\$60.00
							\$60.00

Group Total: 1

							\$7,063.00
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Total Records: 71

12/3/2025



Jedidiah Draeger
 Director, Neighborhood and Building Services



MEMORANDUM

DATE: December 16, 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 November 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 November 18, 2025 through December 16, 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
Kalie	Carole	Bienfang's	Y	\$15
Gillian	Rippl	Brickhouse Pizza	Y	\$15
Natalie	Furan	Kwik Trip #1506	Y	\$25
Steven	Riggs	Kwik Trip #1506	Y	\$15
Denise	Strauss	Kwik Trip #1506	Y	\$25

MOBILE MERCHANT

None

DOOR-TO-DOOR RESIDENTIAL / DIRECT SELLER

None

FINANCIAL ANALYSIS

In accordance with the City's Ordinances and Fee Schedule, a total of \$95 was collected for

Operator's licenses.

RECOMMENDATION

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

ATTACHMENTS

None



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action relating to a Special Event: Friends of Haumerson's Pond Winter Ski, Skate and Hike, Saturday, February 7, 2026, from 2 p.m. to 8 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

Friends of Haumerson's Pond

Event: Winter Ski, Skate & Hike

Dates and Hours of Event: Saturday, February 7, 2026, 2 pm - 8 pm

Locations: Haumerson's Pond

Contact Person: Josie Kincaid, josie7001@gmail.com

Estimated Number of Attendees: 500

FINANCIAL ANALYSIS

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

RECOMMENDATION

Staff recommends that City Council approve the Friends of Haumerson's Pond Winter Ski, Skate and Hike on Saturday, February 7, 2026, from 2 p.m. to 8 p.m at Haumerson's Pond.

ATTACHMENTS

- 1. SKI SKATE HIKE 2026 Application 2.7.26



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

Name of Business/Group Organizing Event: **Friends of Haumerson's Pond**

Contact Person for Event: **Josie Kincaid**

Phone Number: _____ Email: **friendsofhpond@gmail.com**

Day of Event Contact Person (if different from above): _____ Phone: **920-723-7001** Email: _____

Special Event Details

Event Name: **Ski Skate & Hike**

Event Date (mm/dd/yyyy): **02/07/2026**

Event Location: **Haumerson's Pond**

Estimated Number of Attendees: **500** Hours of Event: **2pm-8pm**

Event Setup Time: **12pm** Event Tear Down Time: **8:30pm**

Event Description: **We will have ice skating, hockey and other games to play. If there is snow guests are welcome to ski or walk the trail. At dusk we light the trail for a nice evening walk. There will be hot drinks, food and merchandise available for purchase during the event. We also hope to have live music inside the warming house during the event.**

Goal/Purpose of Event: **We do this event to provide the community and surrounding towns with a low cost family friendly activity.**

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:

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: 3pm End Time of Music: 8pm

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: Josee Kuoai

Submission Date: 12-4-25

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: December 16, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action relating to a Special Event: Generals Fort Atkinson Cruise Night: May 11, 2026, June 8, 2026, July 13, 2026, August 10, 2026, and September 14, 2026, from 5:30-8:30 pm 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: Generals Fort Atkinson Cruise Night

Date and Hours of Event: May 11, 2026, June 8, 2026, July 13, 2026, August 10, 2026, and September 14, 2026. Event 5:30-8:30 p.m.

Location: Jones Park

Contact Person: Josh Smith

Estimated Number of Attendees: 500

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: Generals Fort Atkinson Cruise Night: May 11, 2026, June 8, 2026, July 13, 2026, August 10, 2026, and September 14, 2026, from 5:30-8:30 pm at Jones Park.

ATTACHMENTS

1. Jones Park Cruise Nights Application 2026
2. Commercial Property & General Liability Coverage for Application



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

Name of Business/Group Organizing Event: **Fort Atkinson Generals**

Contact Person for Event: **Josh Smith**

Phone Number: **262-949-4596** Email: **jsmithXC@gmail.com**

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

Special Event Details

Event Name: **Jones Park Cruise Nights**

Event Date (mm/dd/yyyy): **05/11/2026; 6/8/2026; 7/13/2026; 8/10/2026; 9/14/2026 (2nd Monday of the Month, May-Sept.)**

Event Location: **Jones Park**

Estimated Number of Attendees: **500** Hours of Event: **5:30 p.m. - 8:30 p.m.**

Event Setup Time: **3:00 p.m.** Event Tear Down Time: **8:30 p.m.**

Event Description: Jones Park has hosted classic car show events for many years. The Generals took over the events in 2024 and look to continue in 2026. The Cruise Nights feature restored vintage vehicles and classic automobiles. A DJ serves as master of ceremonies, announcing arriving vehicles, providing trivia questions and awarding small prizes. He also plays music. The Fort Atkinson Generals will provide concessions for attendees.

Goal/Purpose of Event: To attract car show participants and attendees to Fort Atkinson, promoting tourism for the city and placing a spotlight on the community's parks. The event provides fellowship and entertainment for Fort Atkinson residents and visitors from out of town.

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:

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: 5:30 p.m. End Time of Music: 8:30 p.m.

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: e-signed: Joshua Smith

Submission Date: 11/11/25

For Office Use Only:

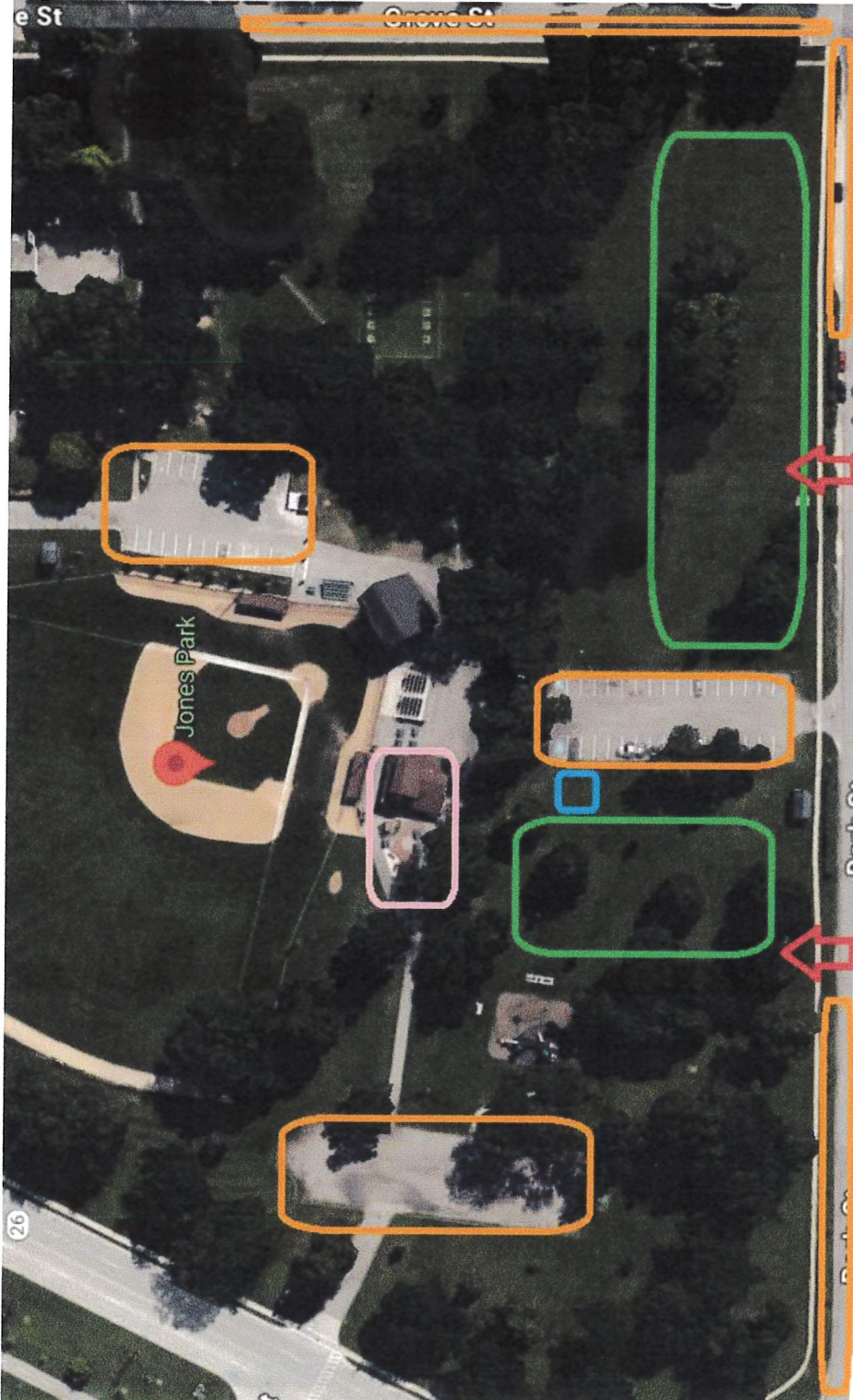
Date Received: _____

Date Paid: _____

Council Approval / Denial Date: _____

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

Event Stipulations:



Orange locations are designated for attendance parking; additional parking available on side streets around Jones Park.

Green locations are designated for classic car parking and show area.

Blue area is where DJ operates and utilizes electricity
 Pink area indicates concessions location.

Classic cars enter park where red arrows are placed. This allows cars to enter the park without driving over curbs in the parking lot.



West Bend Insurance Company
1900 S. 18th Ave. | West Bend, WI 53095

New Business

Commercial Lines Policy Declaration

Customer Number: 1000848699
Policy Number: B953794 00

Policy Period: 02/12/2025 to 02/12/2026
at 12:01 AM Standard Time at Your Mailing Address Shown Below

Named Insured and Address:
Fort Atkinson Generals Baseball Team, Inc
1431 Lena Ln
Fort Atkinson, WI 53538

Agency Name and Address: 48111
HOMETOWN INSURANCE GROUP INC
432 WEST RYAN ST.
PO BOX 38
BRILLION, WI 54110
920-756-5333

In return for the payment of the premium, and subject to all the terms of this policy, we agree with you to provide the insurance as stated in this policy.

This policy consists of the following coverage parts for which a premium is indicated. This premium may be subject to adjustment.

Coverage Part

Commercial Property Coverage

Commercial General Liability Coverage

Commercial Inland Marine Coverage

Total Premium:

Total Including Taxes, Fees and Surcharges:

This is not a bill. A billing invoice will be sent separately.

See attached schedule for forms applicable to all coverage parts.



West Bend Insurance Company
1900 S. 18th Ave. | West Bend, WI 53095

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Named Insured Schedule

Fort Atkinson Generals Baseball Team, Inc



West Bend Insurance Company
1900 S. 18th Ave. | West Bend, WI 53095

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Commercial Lines Policy Declarations

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Location Schedule

Loc	Address	City	County	State	Zip
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1900 S. 18th Ave. | West Bend, WI 53095

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Forms Schedule

Number	Edition	Description
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IL0935Y	0702	EXCLUSION OF CERTAIN COMPUTER-RELATED LOSSES
IL0952Y	0115	CAP ON LOSSES FROM CERTIFIED ACTS OF TERRORISM
IL0985	1220	DISCLOSURE PURSUANT TO TERRORISM RISK INSURANCE ACT
WB214	0524	MEMBERSHIP AND VOTING NOTICE
WB660	0824	TWO OR MORE COVERAGE FORMS OR POLICIES ISSUED BY US
WB241	0524	WEST BEND INSURANCE COMPANY NAME CHANGE ENDORSEMENT
IL0283Y	1118	WISCONSIN CHANGES - CANCELLATION AND NONRENEWAL
IL0021	0908	NUCLEAR ENERGY LIABILITY EXCLUSION ENDORSEMENT (BROAD FORM)



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action relating to a Special Event: General's Baseball Fest, June 18, 2026-June 21, 2026, 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: Fort Atkinson Generals Baseball Festival

Dates and Hours of Event:

Thursday June 18, 6:00 pm to 11:59 pm

Friday June 19, 6:00 pm to 11:59 pm

Saturday June 20, 10:00 am to 11:59 pm

Sunday June 21, 12:00 pm to 4:00 pm

Event Set up: week of June 15, 2026

Event Tear down: By Monday, June 22, 2026

Location: Jones Park, 600 Janesville Avenue

Contact Person: Tim Garant, fortgeneralsbaseball@gmail.com

Estimated Number of Attendees: 2,500 over 4 days

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 the City Council approve the Special Event: General's Baseball Fest June 18, 2026-June 21, 2026 at Jones Park.

ATTACHMENTS

- 1. Baseball Fest Application & Map 6.18.26
- 2. Commercial Property & General Liability Coverage for Application



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

Name of Business/Group Organizing Event: **Fort Atkinson Generals Baseball Team, Inc.**

Contact Person for Event: **Tim Garant - Agent for the Fort Atkinson Generals Team, Inc.**

Phone Number: **(920) 222-2184** Email: **fortgeneralsbaseball@gmail.com**

Day of Event Contact Person (if different from above): **Josh Smith** Phone: **(262) 949-4596** Email:

Special Event Details

Event Name: **Fort Atkinson Generals Baseball Festival**

Event Date (mm/dd/yyyy): **June 18th through June 21st, 2025**

Event Location: **600 Janesville Avenue (Jones Park), Fort Atkinson, WI 53538**

Estimated Number of Attendees: 2,500 + over the 4 days	Hours of Event: 18th & 19th: 6:00pm to 11:59pm / 20th: 10:00am to 11:59pm / 21st: 12:00pm - 4:00pm
Event Setup Time: Week of June 15th	Event Tear Down Time: By Monday, June 22nd

Event Description: **Baseball Festival & Carnival**

Goal/Purpose of Event: **Fundraising for future Jones Park projects and improvements; partnering with local businesses and organizations through volunteer-fundraising opportunities; inviting visitors to Fort Atkinson to showcase the city's parks and bring potential business to the local economy; and providing entertainment and recreation for our city's residents.**

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	<u>10</u>
Additional Garbage/Recycling Can*	Qty	<u>10</u>
Barricades*	Qty	<u>1</u>
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:
Per requirements from Food vendors. They will contact City Electrician directly.

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: 6/19-7:30pm & 6/20-7:00pm End Time of Music: 6/19-10:30pm & 6/20-11:00pm

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: Timothy A Garant

Submission Date: 11/11/25

For Office Use Only:

Date Received: _____

Date Paid: _____

Council Approval / Denial Date: _____

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

Event Stipulations:

Represents Porta Potties

S 6th St

S 6th St

S 6th St

Grove St

Grove St

Grove St

Grove St

Milo St

BARRICADE
TO CLOSE ACCESS

ENTERTAINMENT
TENT

CARNIVAL SETUP
AND RIDES

Jones Park

FOOD
TRUCKS

PARKING
OVERFLOW

Park St

Park St

Park St

Park St

Janesville Ave

S 7th St

Glacial River Trail



West Bend Insurance Company
1900 S. 18th Ave. | West Bend, WI 53095

New Business

Commercial Lines Policy Declaration

Customer Number: 1000848699
Policy Number: B953794 00

Policy Period: 02/12/2025 to 02/12/2026
at 12:01 AM Standard Time at Your Mailing Address Shown Below

Named Insured and Address:
Fort Atkinson Generals Baseball Team, Inc
1431 Lena Ln
Fort Atkinson, WI 53538

Agency Name and Address: 48111
HOMETOWN INSURANCE GROUP INC
432 WEST RYAN ST.
PO BOX 38
BRILLION, WI 54110
920-756-5333

In return for the payment of the premium, and subject to all the terms of this policy, we agree with you to provide the insurance as stated in this policy.

This policy consists of the following coverage parts for which a premium is indicated. This premium may be subject to adjustment.

Coverage Part

Commercial Property Coverage

Commercial General Liability Coverage

Commercial Inland Marine Coverage

Total Premium:

Total Including Taxes, Fees and Surcharges:

This is not a bill. A billing invoice will be sent separately.

See attached schedule for forms applicable to all coverage parts.



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Named Insured Schedule

Fort Atkinson Generals Baseball Team, Inc



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IL0021	0908	NUCLEAR ENERGY LIABILITY EXCLUSION ENDORSEMENT (BROAD FORM)



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action relating to the Rescheduling of City Council meetings to accommodate 2026 Elections (Ebbert, Clerk/Treasurer/Finance Director)

BACKGROUND

Section 2-52 of the City of Fort Atkinson Municipal Code governs City Council meetings. Section (a) states that regular meetings of the Council shall meet annually on the Third Tuesday of April for the purpose of organization and regular meetings shall be held on the first and third Tuesdays of every month thereafter.

If the date for such regular meeting falls upon a legal holiday or day of election, the council may meet the following Thursday.

DISCUSSION

The Council regularly meets on the first and third Tuesday of every month. In 2026, three elections coincide with Council meeting dates. Staff proposes to reschedule the council meetings to accommodate staff and allow ample time for voting by meeting attendees.

Elections are a key responsibility of the City Clerk, as is taking the minutes at the City Council meeting. Rescheduling the meeting allows the City Clerk to focus entirely on the Election and provides the opportunity for Council and Staff to cast their vote on said date without meeting conflicts.

The following meeting dates are proposed:

- Tuesday, February 17 to Thursday, February 19 (Spring Primary)-*If Necessary*
- Tuesday, April 7 to Thursday, April 9 (Spring General Election)
- Tuesday, November 3 to Thursday, November 5 (General Election)

The Partisan Primary is scheduled for Tuesday, August 11th and does not conflict with the City

Council meeting schedule.

FINANCIAL ANALYSIS

There is no financial impact to rescheduling meetings.

RECOMMENDATION

Staff recommends the City Council reschedule City Council meetings in 2026 to accommodate Elections.

ATTACHMENTS

None



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Michelle Ebbert, Clerk/Treasurer/Finance Director

RE: Review and possible action relating to Appointment of Election Inspectors for a two-year cycle (Ebbert, Clerk/Treasurer/Finance Director)

BACKGROUND

An election official is defined as “an individual who is charged with any duties relating to the conduct of an election” per Wis State. 5.02. County and municipal clerks are election officials, as are election inspectors, chief inspectors, greeters and canvas board members. Election officials perform a very important public service by enhancing the high quality and integrity of our elections. Wisconsin Statutes Chapter 7 prescribes the selection, training, and duties for election officials.

DISCUSSION

The Wisconsin statutes outline the process for selection of election officials, requiring the municipal governing body to appoint Election Inspectors at a meeting in December, no later than December 31, 2025, for a two-year term which begins January 1, 2026, and ends December 31, 2027. (Wis. Stats. §§ 7.30(4)(a), 7.30(6))

Statutes also allow for the County parties to appoint qualified individuals to serve as Election Inspectors. The Democratic and Republican parties of Jefferson County both submitted lists prior to the deadline, and those individuals are included in the list attached to this memo.

Election inspectors staff the polling place on Election Day, preserve the order of the process, register electors, record electors, issue ballots, monitor voting equipment and properly complete required forms. Inspectors are required to attend training every two years and must have attended training within two years of any election at which they serve. Staff conducted two training sessions in November, with another to be held in January. Staff also provides training before any election and a brief refresher of procedures during every election.

FINANCIAL ANALYSIS

There is no financial impact for appointment and training of inspectors.

RECOMMENDATION

Staff recommends the City Council appoint Election Inspectors on the attached list for the election cycle beginning January 1, 2026 and ending December 31, 2027.

ATTACHMENTS

- 1. 26-27 Alphabetical List of Election Inspectors

2026-2027 Election Inspectors

Last Name,	First Name	Party Affiliation
Bevington	Amy	Democratic Party Nominated
Green	Linda	Democratic Party Nominated
Beauchamp	John	Republican Party Nominated
Flessert	Chris	Republican Party Nominated
Fries	Scott	Republican Party Nominated
Kirk	James	Republican Party Nominated
Martin	Ron	Republican Party Nominated
Newbold	Jeffrey	Republican Party Nominated
Prescott	Rita	Republican Party Nominated

Last Name,	First Name	Party Affiliation
Holzaepfel	John	Unaffiliated
Houseman	Rebecca	Unaffiliated
Hustedt	Doug	Unaffiliated
Kakuschke	Kathy	Unaffiliated
Ketterman	Larry	Unaffiliated
King	Diane	Unaffiliated
Koch	Bobbie	Unaffiliated
Koljord	Lori	Unaffiliated
Konkel	Gail	Unaffiliated
Latorraca	Ellen	Unaffiliated
Lembitz	Lance	Unaffiliated
Nelson	Brittany	Unaffiliated
Nyquist	Laura	Unaffiliated
Palenik-Kilroy	Sandy	Unaffiliated
Pett	Nancy	Unaffiliated
Smillie	Timothy	Unaffiliated
Statz	Mark	Unaffiliated
Steiner	Gina	Unaffiliated
Swenson	Betsy	Unaffiliated
Swenson	Kirk	Unaffiliated
Thom	Courtney	Unaffiliated
Toeller	Nettie	Unaffiliated
Turk	Linda	Unaffiliated
Tuttle	Becky	Unaffiliated
Van de Ven	Kara	Unaffiliated
Vergenz	Cynthia	Unaffiliated
Whisner	Michelle	Unaffiliated
Williams	Pam	Unaffiliated
Witkins	Jerry	Unaffiliated
Wolff	Leslie	Unaffiliated

Last Name,	First Name	Party Affiliation
Baker	Kevin	Unaffiliated
Black	Jodi	Unaffiliated
Bleecker	Rick	Unaffiliated
Block	David L	Unaffiliated
Block	Terese Kaskubar	Unaffiliated
Bushcott	Adam C	Unaffiliated
Butts	Catherine	Unaffiliated
Clayton	Jess	Unaffiliated
Diel	Janell	Unaffiliated
Doyle	Carrie	Unaffiliated
Drury	John	Unaffiliated
Dunnington	Pam	Unaffiliated
Dunnington	Dennis	Unaffiliated
Ebbert	Michelle	Unaffiliated
Fick	Tom	Unaffiliated
Fragola	Patricia	Unaffiliated
Freson	Helen	Unaffiliated
Frigo	David	Unaffiliated
Fuller	Jill	Unaffiliated



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Jedidiah Draeger, Director of Neighborhood and Building Services

RE: Review and possible action relating to a one-year Intergovernmental Agreement with the Town of Koshkonong for Building Inspection Services (Draeger, Neighborhood and Building Services Director)

BACKGROUND

The City was approached by the Town of Koshkonong to explore the possibility of providing building inspection services. The Town initiated this discussion after being notified that its current contract with the City of Lake Mills would be restructured to utilize an independent inspection agency rather than the City of Lake Mills' former in-house inspector. Under that revised arrangement, the City of Lake Mills would serve only as an intermediary in the contract.

The Town of Koshkonong does not have staff capable of performing its own inspection services, and the volume of permits issued each year does not justify hiring an additional staff member. The City, by contrast, has qualified staff in place and the capacity to absorb the modest number of permits and inspections typically generated within the Town.

The City and Town previously discussed a similar arrangement in 2023, but at that time the Town elected to enter into an agreement with the City of Lake Mills because its inspector had served as the Town's inspector prior to being hired by the City of Lake Mills.

Wis. Stat. § 66.0301 (Intergovernmental Cooperation) provides the authority for municipalities to enter into agreements of this nature.

DISCUSSION

Under the proposed agreement, the City will provide Building Inspection Services to the Town on an as-needed basis, handling permit reviews and inspections in accordance with the Wisconsin Uniform Dwelling Code and applicable municipal building codes. The City will collect the fees as permits are issued and will then issue a payment to the Town on a monthly basis for its portion of the fees. The Town will continue to manage all other responsibilities and local ordinances not covered by the building code.

Services Provided by the City Under the IGA

- Core Services: Building plan review, permitting, and inspections to ensure Town compliance with applicable codes.
- Inspection Types: Commercial and residential building, plumbing, electrical, and HVAC.
- Permit Application Process: The Town agrees that applicants for new one- and two-family dwelling structures and all other applications must complete the online portal permit form on the City's website or deliver hard-copy applications to the City's Municipal Building.
- Permit Issuance: Review and issuance of building, plumbing, electrical, and HVAC permits.
- Enforcement: Orders to correct building code violations; Town responsible if citations are required.
- Record Keeping & Administration: Maintain electronic records of permit applications and fees; collect and process payments on Town's behalf.
- Financial Reporting: Monthly reports detailing permits issued and fees collected.
- City Logistics & Support: Provides code books, technical manuals, inspection equipment, phone and secretarial support, and a registered, insured vehicle.

Services Not Provided by the City Under the IGA

- Zoning Approvals: The Town or permit applicant must provide applicable zoning approvals required by Jefferson County Zoning, such as conditional use permits, prior to the City Building Inspector issuing a building permit for a particular application.
- State Seals: The Town is required to purchase State UDC Building Seals and provide them to the City for use on approved permits for new construction of one- and two-family homes.
- Open Records Coordination: The Town Clerk must coordinate with the City's responses to requests for open records made pursuant to Chapter 19 of the Wisconsin Statutes.
- Fence, Driveway, and Filling Permits: The Town shall continue to inspect and provide approvals for fence, driveway, and filling permits as outlined in the Town's Code of Ordinances.

The intergovernmental agreement for building inspection services is based on mutual benefit and efficiency between the City and the Town of Koshkonong. Both parties recognized that working together can provide better, more effective municipal services. Under the agreement, the City will use its existing resources, including on-staff certified inspectors for general construction, electrical, plumbing, HVAC, to provide services to the Town as needed. In return, the costs of these services are shared fairly. The agreement also sets a shared vision for the future, with both the City and Town planning to apply for the Wisconsin Department of Revenue Innovation Fund Grant if the one-year trial period proves successful. Ultimately, the goal is to provide benefits to both parties in proportion to the responsibilities and liabilities each assumes.

FINANCIAL ANALYSIS

The agreement sets out how the City of Fort Atkinson and the Town of Koshkonong will handle finances and share costs for building inspection services. The City keeps 80% of permit fees, and the Town gets 20%, with a payment to the Town for its portion sent monthly. The Town guarantees at least \$10,000 in collected permit fees to the City by the end of 2026 or the remaining amount will be paid by the Town to the City. The City also keeps its share even if fees are waived or partially refunded by the Town. Re-inspections, special projects, or enforcement actions, are billed at \$90 per hour, and starting construction without a permit doubles the fee. The City covers its own administrative and operational costs, while the Town handles legal support, reimburses extra costs or claims, and provides the required UDC building seals. The

Town will use the fee structure provided as Exhibit A, and if the trial period goes well, both parties plan to apply for the Wisconsin Department of Revenue Innovation Fund Grant to support the program in the future. The total permit fees collected by the Town were \$45,926 in 2023, \$37,960 in 2024, and \$16,106 as of September 9, 2025. The numbers show that the required \$10,000 minimum should be achievable even in a year with a reduced number of permits and will provide the City with additional revenue.

RECOMMENDATION

City Staff recommend that the City Council direct the City Manager to enter into a one-year Intergovernmental Agreement with the Town of Koshkonong for building inspection services for 2026.

ATTACHMENTS

- 1. COFA and T. Kosh Inspection Services Agreement Draft 11.4.25
- 2. COFA_TOK__Draft Permit Fees_2026
- 3. TOK.Licenses & Permits LOG

INTERGOVERNMENTAL AGREEMENT
FOR BUILDING INSPECTION SERVICES

Between City of Fort Atkinson and Town of Koshkonong

This agreement (“Agreement”) is made by and between the Town of Koshkonong (“Town”) and the City of Fort Atkinson (“City”), municipal corporations located in the County of Jefferson. The purpose of this Agreement is to establish a shared service relationship, where the City shall provide to the Town building plan review, permitting, and building inspection services on an as needed basis to ensure the respective Town’s compliance with applicable local and State building codes and ordinances.

WHEREAS, the Town desires to contract with the City for said building plan review, permitting, and inspection services; and

WHEREAS, the City has determined that both communities will mutually benefit from this shared service Agreement and therefore also desires to provide said services and functions for a one-year trial basis; and

WHEREAS, the City either directly employs or contracts for State certified inspectors for general construction, electrical, plumbing, HVAC, and commercial inspections; and

WHEREAS, if the one-year trial period of this Agreement is successful, the City and the Town intend to apply for the Wisconsin Department of Revenue Innovation Fund Grant to support this shared service agreement in the future; and

WHEREAS, the Town and the City, pursuant to Wisconsin State Statute 66.0301 (2) have the authority to enter into cooperative intergovernmental agreements.

NOW, THEREFORE, the Town and the City, in consideration of the mutual promises hereinafter set forth, do agree as follows:

1. Parties

Parties to this Agreement are the City, a Wisconsin municipal corporation with its principal offices located at 101 N Main St., Fort Atkinson, Wisconsin, and the Town, a Wisconsin municipal corporation with its principal offices located at W5609 Star School Road, Fort Atkinson, Wisconsin, together “the Parties.”

2. Authority.

The parties to this Agreement are authorized by law to enter into this Intergovernmental Agreement pursuant to Sec. 66.0301, Wis. Stats.

3. Purpose

The purpose of entering into this Agreement by the Town and the City is for the provision of required building plan review, permitting, and building inspection services for all persons and properties located within the entire Town and is consistent with intergovernmental cooperation as described in Wis. Stat. sec. 66.0301. In particular, Wis. Stat. sec. 66.0301(2) expressly provides that “any municipality may contract with other municipalities...for the receipt or furnishing of services of the joint exercise of any power or duty required or authorized by law.”

It is the common belief of the City and the Town that superior and more effective municipal services can be secured and promoted by the joint and mutual cooperation of the City and the Town and that the cost of such municipal services can be equitably shared.

4. Services Provided by the City:

The Town hereby contracts with the City for the provision of commercial and residential building, plumbing, electrical and HVAC inspection services, on an as-needed basis. Services to be provided include:

- a. Review of applications for building permits and building plans submitted and issuance of building, plumbing, electrical, and HVAC and any related permits in compliance with applicable Municipal Ordinances and the State of Wisconsin Uniform Dwelling Code and Uniform Building Code.
- b. Perform all building inspections and all general inspections from footings to final occupancy as are required by the Towns Municipal Ordinances, State Regulations, and permit requirements. Inspections normally will be performed on Mondays, Wednesdays, and Thursdays, excluding weekends and holidays. Reasonable efforts will be made to complete inspections by the end of the second business day following the day of notification/ submittal of request to inspect or as otherwise agreed between the applicant and the Inspector.
- c. Issue orders to correct discrepancies in building code violations.
- d. Maintain electronic records of building permit applications and permits issued, including such items as date applied, date issued, permit number, type, contractor, owner, property address, and permit and other fees owed.
- e. Provide to builders, owners, and residents of the Town information regarding the Building Codes and Ordinances by phone, email, and in person at the City's Municipal Building.
- f. Attend meetings upon special request by the Town Chairperson.
- g. Review the Town's monthly listing of permits issued, and revenues collected to verify that all permits approved for issuance have been accounted for in the respective monthly report.
- h. Appear in Jefferson County Circuit Court as requested by the Town with respect to building code enforcement and ordinance violations. Requests for such appearances shall be made by the party identified in Section 4.f. of this Agreement.
- i. Perform, on behalf of the Town, their responsibilities under the State of Wisconsin Uniform Dwelling Code and Uniform Building Code.
- j. All services shall be performed consistent with applicable state statutes and the Town's Code of Ordinances.
- k. Once a permit has been approved by the City Building Inspector for issuance and fees have been paid, said permit shall be made available for pick-up at the City's Municipal Building or by email. The City shall collect and process the payments relating to said permit issued on the Town's behalf. The City shall advise the contractor/applicant of the availability of the permit for pick-up or email. The City shall provide monthly reports to the Town including which permits were issued, and the calculated permit fees collected. This information shall be then cross-checked with the financial records maintained by the City and, once any discrepancies are resolved, then be used by the City to reimburse the Town for their portion of the fees collected under this Agreement.

- I. The Parties acknowledge that this Agreement represents an independent contract relationship and that in no event shall any of the persons performing services for the City under this Agreement be considered employees of the Town.

5. Reports/Records Services Provided by the City

During the term of this agreement, the City's Department of Neighborhood and Building Services shall:

- a. Maintain electronic files for the Town applications and permits, containing the information specified in Section 4.d. above, which will be provided to the Town upon request or at the end of the term of the Agreement.
- b. Provide the Town an electronic report of services rendered as of the end of the month including a list of inspections made and permits issued.
- c. As may be requested from time to time, provide reports, documents, and files relating to building inspection to the Town Chairperson.
- d. Answer/respond to requests for open records made pursuant to Chapter 19 of the Wisconsin Statutes in coordination with the Town Clerk's responses to requests for building inspection records that have not yet been transferred to the Town.

6. Other Items Provided by the City

The City shall provide the following related to the performance of this agreement:

- a. Phone support relating to building inspection services performed for the Town pursuant to this Agreement.
- b. All necessary secretarial support for maintaining files while in the possession of the City.
- c. All code books, technical manuals, and inspection equipment.
- d. All necessary professional organization dues and costs of on-going training and re-certification for the City's Building Inspector.
- e. A properly registered and insured vehicle for use while performing services within the Town including the costs of maintenance, insurance, fuel, etc. required.

7. Items Provided by the Town

- a. The Town shall provide the City a listing of all impact and connection charges applicable to their municipality. Prior to the issuance of a building permit by the Building Inspector, applicable zoning approvals required by Jefferson County Zoning, including but not limited to conditional use permits, for a particular building permit application shall be provided by the Town. The responsibility to process any changes relating to zoning shall rest with the Town.
- b. The Town agrees that for new 1 and 2 family dwelling structures and all other applications, applicants shall be required to complete the online portal permit form located on the City's website or deliver such permit applications to the City's Municipal Building. The Town agrees to utilize the City's building permit application forms through the online portal or hard copies available through the City's website or in person.
- c. The Town will provide any other required special office supplies or documents needed to process and file permits.

- d. State UDC Building Seals. The Town is required to purchase these building seals; and shall provide them to the City for use on approved permits for new construction of 1 and 2 family homes.
- e. During the term of this agreement, the Town shall maintain the plan review and permit fee structure attached hereto as Exhibit A, except as this fee structure may be modified concurrently by the City and the Town.
- f. The Town shall continue to inspect and provide approvals for fence, driveway, and filling permits as outlined in the Town's Code of Ordinances.
- g. Legal advice/support for any legal issues arising from the performance of duties by the City's building inspectors under this Agreement, including, but not limited to, code enforcement actions, raze orders, special charge claims, open records requests, and other building inspection issues shall be provided directly by each communities' respective Attorney.

8. Fees Retained by the City for Services Rendered through this Agreement.

In consideration of the services to be performed by the City, the Town shall pay the City for said services in the following manner:

- a. Permit Fee Revenue Allocation: 80% of the permit fee revenue invoiced monthly for services identified in Section 4.a., 4.b., 4.d., 4.g., 4.i., and 4. k. and Section 5. a-d.

If the Town waives its permit fees for a Town or other project, the fees that would otherwise have been paid shall be calculated, and the City shall be paid 80% of the permit fee revenue that would have been generated but for the waiver by the Town.

If a decision is made by an applicant to not to proceed with a project after a permit is issued, and the Town desires to consider some level of refund, no refund of any portion of the City's building review and administrative fee shall be approved. Additionally, the City shall be paid, or if already paid, shall retain the higher of the following: 80% of the revenues after the partial refund; or the actual costs incurred by the City to issue the permit.

- b. Minimum Payment. The minimum payment for the services outlined in this Agreement to the City from the Town shall be \$10,000. If the revenue from permits, inspections, and all other services does not exceed \$10,000 by December 31, 2026; then the Town shall pay the City \$10,000 or the difference between the revenue retained by the City and \$10,000. The City will invoice the Town for the amount with the proper documentation by January 31, 2027, with payment due within 30 days.
- c. Hourly rate for services identified in 4.c., 4.f., and 4.h: \$90.00/hour. In addition to the services identified in 4.c., 4.f. and 4.h., this hourly wage will be applied to any additional services beyond the scope of the services identified in this Agreement as requested by the Town Chairperson, with prior approval from the City Building Inspector.
- d. Special inspections/inspectors: Permits requiring additional inspections due to a unique project or failed inspections shall require additional fees collected by the City.
 - i. Special projects requiring additional inspections or inspectors shall be reimbursed to the City at the rate detailed in 8.c. by the Town. Such situations will be brought to the attention of the Town Chairperson prior to incurring the expense for concurrence.

- ii. Additional inspections due to failed inspections shall be assessed as a re-inspection fee of not less than \$90.00 per inspection, paid by the permit applicant.
- e. The Town has a fence and driveway ordinance that has been implemented and administered by others. Administration of these ordinances by the City Building Inspector is not contemplated in this Agreement.

9. Review of Agreement

In the 3rd quarter of 2026, or on a date and time mutually agreeable to the City and the Town, the City and the Town shall meet to review and discuss the overall services provided in the prior year. If the Parties determine that the relationship has been mutually beneficial, a new agreement shall be drafted with a longer term. Additionally, the plan review, permit fee structure, revenues, and costs associated with this Agreement shall be reviewed prior to drafting a new agreement. The objective of this intergovernmental shared services agreement is to provide a benefit to each of the participating parties in line with the level of responsibility/liability assumed by the respective party. If, based on the review of revenues and costs, there is a concern that this objective is not being achieved, the Parties may discuss alternatives to address this situation and consider, if appropriate, modifications to a future agreement.

10. Payment From City to Town

The City shall send payment to the Town for the Town’s 20% portion of the permit fees collected. All portions shall be reimbursed to the Town under this Agreement on a monthly basis. The City shall make payments to the Town within 30 days of the end of each month along with the monthly report.

11. Term of Agreement

The term of this agreement shall commence January 1, 2026, and shall terminate on December 31, 2026.

12. Termination of Agreement

This Agreement may be terminated with or without cause by the City or the Town upon 60 days written notice to the other party. All such notices shall be by certified mail or personally delivered as follows:

If to City: Rebecca Houseman, City Manager
City of Fort Atkinson Municipal Building
101 N Main St
Fort Atkinson, WI 53538
(920) 397-9901 – Telephone

If to Town: Kim Cheney, Town Chair
Town of Koshkonong
W5609 Star School Rd
Fort Atkinson, WI 53538
(920)563-4510 – Telephone

If this Agreement is terminated and subject to the mutual agreement of the City and the Town, The City will either (1) continue to service any open permits for which permit revenues have been or are in the process of being paid to the City; or (2) the Town will pay amounts owed on permits reviewed and/or issued by the City prior to the date of termination and the City will reimburse on active permits a prorated share of permit revenues paid based on the percentage of work on each permit yet to be performed.

13. Assignment

This Agreement shall not be assigned to any other party without the written consent of the Town and the City.

14. Amendments

The City and the Town may alter, amend and/or rescind any or all of the provisions of this Agreement by the written approval of the governing bodies of the Parties.

15. Insurance

The City shall maintain public liability insurance coverage and worker's compensation coverage for the City inspectors who are employees of the City and performing work under this Agreement. Any contractors retained by the City and providing services to the Town through this Agreement shall submit to the City a certificate of insurance for liability and worker's compensation coverage. Pursuant to the hold harmless, indemnification, and release provision set forth in Section 16, below, the Town shall reimburse the City for additional costs incurred by the City as a result of work performed pursuant to this Agreement or any insurance claims made related to or as a result of the work performed under this Agreement.

16. Hold Harmless, Indemnification, and Release

The City shall not be liable to the Town or any third party for injuries, expenses, or damages resulting from work undertaken pursuant to this Agreement. The Town shall indemnify and save harmless the City, its officers and employees, from all suits, actions or claims or costs of any kind, including actual reasonable attorney's fees, brought because of any injuries or damages received or sustained by any person, or persons or property on account of or related to this Agreement or its Purpose; or because of any act, omission, neglect, intentional act or negligence of the City or its inspectors, agents, officers or employees; or because of any claims or amounts arising or recovered under the Worker's Compensation Act relating to employees of the City; or any other law, ordinance, order or decree relating to the work done pursuant to the Agreement.

17. Governing Law

This agreement and all questions arising in connection herewith shall be governed by the laws of the State of Wisconsin.

18. No Third-Party Beneficiary

This Agreement is intended to be solely between the City and the Town. Nothing in this Agreement shall be interpreted as giving to any person or entity not a party to this Agreement any legal or equitable rights whatsoever.

19. Enforcement

- a. Notice of Breach/Dispute Resolution. If a party to this Agreement believes that a party to this Agreement is in breach of this Agreement, the aggrieved party shall promptly serve written notice of said breach upon that party. The parties shall meet promptly thereafter and shall endeavor in good faith to resolve any dispute amicably. If the initial meeting fails to resolve the dispute the parties shall meet again within thirty (30) days after service of the written notice. This subsection is intended by the parties to waive their respective statutory right to any further notice under s. 893.80(1)(a), Wis. Stats., to the extent such subsection is applicable.
- b. Limitation on Commencement of Civil Action. No civil action may be commenced until thirty (30) days from the effective date of the written notice required by this Agreement, except that a party may commence an action seeking specific performance or injunctive relief in

less than thirty (30) days if, in that party's good faith judgment, such an action is necessary to protect the public health, safety or welfare.

20. No Challenges to this Agreement

The City and the Town hereby waive any right each may have to commence or maintain any civil action or other proceeding to contest, invalidate or challenge this Agreement or any of the actions required or contemplated by this Agreement, or take any actions, either directly or indirectly, to oppose in any other way, or to initiate, promote or support the opposition of this Agreement or any of the actions required or contemplated by this Agreement.

21. Good Faith and Fair Dealing

The City and the Town hereby acknowledge that this Agreement imposes upon them a duty of good faith and fair dealing. It is the intent and desire of the City and the Town to work together and engage in intergovernmental cooperation. The City and the Town agree to use their best efforts to meet and confer when issues arise pertaining to this Agreement and shall endeavor in good faith to resolve any disputes amicably.

22. Severability

A provision of this Agreement, and the individual parts of each such provision, shall be severable. In the event that any provision of this Agreement, or any part thereof, is held by a Court of competent jurisdiction to be invalid or ineffective, the balance of this Agreement shall survive. In such an event, the City and the Town shall promptly meet to discuss how they might satisfy the intent of this Agreement by alternative means.

23. Implementation

The City and the Town shall take such actions as may be necessary or desirable to implement and effectuate the provisions and intent of this Agreement.

24. Paragraph Titles

Paragraph titles in this Agreement are provided for convenience only and shall not be used in interpreting this Agreement.

25. Interpretation

This Agreement shall be interpreted as though drafted by both parties to the Agreement, the City and the Town.

26. Entire Agreement

This Agreement contains the entire agreement between the parties regarding this matter. This agreement may be modified only by an amendment to this Agreement which is authorized by the governing bodies of the Parties.

The parties have executed this agreement on this _____ day of _____ 2025.

Town of Koshkonong:

The Town of Koshkonong, Jefferson County, WI

Kim Cheney, Town Chairperson

Caitlin Kincannon, Town Clerk

City of Fort Atkinson:

The City of Fort Atkinson, Jefferson County, WI

Rebecca Houseman, City Manager

Michelle Ebbert, City Clerk/Treasurer/Finance Director

Date Approved by the City Council

Exhibit A: Permit Fees

PERMIT / APPLICATION	FEE	COMMENTS
BUILDING CODE		
One and Two Family Residential		
New Construction, UDC Structural	\$.75 per Sq. ft of work	Minimum Charge \$2000
Does not include State Seal Electric, Plumbing and HVAC	\$.12/ per sq ft of work	Minimum Charge \$125
<u>Additions, Remodels, & Accessory Structures greater than 150 sq ft</u>		
Accessory Buildings, UDC Structural - Does not include HVAC, Electric or Plumbing	\$.25/ per sq. ft of work	Minimum Charge \$350.00
Remodeling & Additions - Does not include HVAC, Electric or Plumbing	\$.25/ per sq. ft of work	Minimum Charge \$250.00
Electric, Plumbing and HVAC	\$.12/ per sq. ft of work	Minimum Charge \$125, Max \$1200
<u>COMMERCIAL (including Multi-family) New Construction & Remodel</u>		
New Construction, All Commercial Structural & Multifamily (Does not include Electric, HVAC or Plumbing)	\$.25/ per sq. ft of work	Minimum Charge \$1,500, not including Electrical, Plumbing and HVAC
Remodeling, Additions, Accessory Buildings	\$.25/ per sq. ft of work	Minimum Charge \$250
Commercial Plan Review		Minimum Charge \$ 300
Electrical, Plumbing and HVAC	\$.12/ per sq. ft of work	Minimum Charge \$250
OTHER:		
State Seal	\$40.00	Flat Fee (one per residence)
Special Inspections & Meetings	\$90 per hour + travel fees	Re-inspections, work corrections, misc. or extraordinary administrative, etc. after initial permit issuance. Pre-Permit Application Meetings
Deck Permit (no footings)	\$.50 per sq. ft	Minimum Charge \$125.00
Deck Permit (with footings)	\$.75 per sq. ft	Minimum Charge \$250.00
Erosion Control		0-2 Acres -> \$150, 2-5 acres -> \$200, 5-25 acres -> \$300, 25 and greater -> \$500
Raze & Demolition	\$150	
OTHER:		
Admin & System Filing Fee	\$25	Reports provided outside monthly and yearly as required by agreement.

Additional Electrical

SOLAR INSTALLATIONS RESIDENTIAL

System Rating AC: 0.1kW – 15kW	\$300.00
System Rating AC: over 15kW	\$18/kW plus \$300.00

SOLAR INSTALLATIONS COMMERCIAL

Level I: System Rating AC: 0.1kW-25kW	\$540.00
System Rating AC: 25.1kW -50kW	\$12/kW over 25kW plus \$540.00
Level 1 Plan Review	\$120.00
Level II: System Rating AC: 50.1kW - 100kW	\$12/kW over 50kW plus \$990.00
System Rating AC: 100.1kW - 200kW	\$8/kW over 100kW plus \$1,590.00
Level II Plan Review	\$210.00
Level III: System Rating AC: 200.1kW - 1MW	\$2.25/kW over 200kW plus \$2,430.00
System Rating AC: Over 1MW	\$30/MW over 1MW plus \$4,350.00
Level III Plan Review	\$390.00
Generators Residential	\$300
Generators Commercial	\$500
Electrical Panel and Service upgrades	\$150

NOTES:

- ALL WORK STARTED WITHOUT FIRST OBTAINING A BUILDING PERMIT WILL BE SUBJECT TO DOUBLE THE PERMIT FEE
- A COUNTY ZONING PERIT MUST ACCOMPANY A BUILDING PERMIT APPLICATION WHEN APPLICABLE
- DRIVEWAY AND FENCE PERMITS ARE OBTAINED AT THE TOWN HALL

insp contract town %	insp contra ct %							TOTAL TOWN COLLECTED	BUILDING INSPECTOR COLLECTED
town %	ct %	TYPE	DESCRIPTION	DATE	ADDRESS	CONTRACTOR	FEE	FEE (X% bldg)	COLLECTED FEE
20%	80%	building	detached garage	9/8/2025	N1068 Old 26	Owner	\$200.00	\$40.00	\$160.00
20%	80%	building	detached garage	9/2/2025	N570 Poeppel Rd	Bos Design Builders	\$200.00	\$40.00	\$160.00
20%	80%	building	detached garage	8/28/2025	N1587 Knaack Ct	Begovatz	\$910.00	\$182.00	\$728.00
20%	80%	electrical	generator	8/11/2025	N715 Old 26	Home Backup System	\$81.20	\$16.24	\$64.96
20%	80%	electrical	generator	8/11/2025	N821 Long Dr	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	building	communication to	8/5/2025	W6675 Hoard Rd	TBD	\$360.00	\$72.00	\$288.00
20%	80%	building	shed	7/22/2025	N2603 Cty Rd N	Eighmy Construction	\$200.00	\$40.00	\$160.00
20%	80%	electrical	new service	7/17/2025	N722 Mulligan Way	Renz Electric	\$81.20	\$16.24	\$64.96
20%	80%	building	NSFD	7/14/2025	N1643 Cty Rd K	Owner	\$1,766.25	\$353.25	\$1,413.00
20%	80%	building	pool & pool house	7/14/2025	N851 Eagle Ridge	All Service Specialist	\$1,881.25	\$376.25	\$1,505.00
20%	80%	electrical	generator	7/7/2025	W5832 Cty Rd M	Home Backup System	\$81.20	\$16.24	\$64.96
20%	80%	electrical	service upgrade	6/23/2025	W5798 Woodlawn Dr		\$81.20	\$16.24	\$64.96
20%	80%	building	detached garage	6/18/2025	W5797 S Ra-Le Dr	Midwest Steel	\$200.00	\$40.00	\$160.00
20%	80%	building	elevator	6/18/2025	W5608 Smiley Ln	Bedell Builders	\$175.00	\$35.00	\$140.00
20%	80%	building	remodel	6/16/2025	N1144 Old 26	Owner	\$150.00	\$30.00	\$120.00
20%	80%	building	permit renewal	6/12/2025	W5712 Fox Hill Rd	Owner	\$725.00	\$145.00	\$580.00
20%	80%	building	NSFD	6/4/2025	N841 Long Dr	Patterson Builders	\$1,416.25	\$283.25	\$1,133.00
20%	80%	building	NSFD	6/4/2025	N863 Long Dr	Patterson Builders	\$1,566.25	\$313.25	\$1,253.00
20%	80%	building	addition	5/31/2025	N837 Long Dr	Patterson Builders	\$425.00	\$85.00	\$340.00
20%	80%	electrical	service upgrade	4/29/2025	N1895 US Hwy 12	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	building	new duplex	4/14/2025	N831 Eagle Ridge	Oliver Construction	\$1,891.25	\$378.25	\$1,513.00
20%	80%	building	deck & porch	4/14/2025	W5930 Apple Ln	Carpentry by Chris	\$500.00	\$100.00	\$400.00
20%	80%	building	shed	4/14/2025	N1668 Carlin Rd	Owner	\$200.00	\$40.00	\$160.00
20%	80%	building	3 season porch	4/7/2025	W5979 Friedel Rd	Koolview	\$250.00	\$50.00	\$200.00
20%	80%	building	detached garage	4/4/2025	N722 Mulligan Way	Patterson Builders	\$325.00	\$65.00	\$260.00
20%	80%	electrical	service upgrade	3/31/2025	W6783 Westphal Ln	Midwest electric	\$93.70	\$18.74	\$74.96
20%	80%	building	addition	3/18/2025	N1644 Pleasant Rd	Kamuchey Construction	\$900.00	\$180.00	\$720.00
20%	80%	building	sun porch	3/13/2025	N407 Oxbow Bend	J.B. Construction	\$257.50	\$51.50	\$206.00
20%	80%	building	detached garage	3/13/2025	N890 Fairway Dr	Owner	\$350.00	\$70.00	\$280.00
20%	80%	building	finish basement	3/13/2025	N847 Long Dr	Patterson Builders	\$190.00	\$38.00	\$152.00

20%	80%	electrical	generator installati	2/28/2025	N1797 Friedel Rd	Home Backup System	\$81.20	\$16.24	\$64.96
20%	80%	electrical	add meter to servic	1/22/2025	N804 & N806 Eagle Ridge	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	electrical	add meter to servic	1/22/2025	N809 & N811 Eagle Ridge	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	electrical	add meter to servic	1/22/2025	N812 & N814 Eagle Ridge	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	electrical	add meter to servic	1/22/2025	N826 & N828 Eagle Ridge	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	electrical	generator	1/14/2025	W6789 Westphal Ln	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	electrical	rewire	10/16/2024	N1571 Fairview Ln	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	building	NSFD	10/15/2024			\$1,166.25	\$233.25	\$933.00
20%	80%	building	alteration, addition	9/30/2024	N435 Oxbow Bend		\$1,400.00	\$280.00	\$1,120.00
20%	80%	building	garage	9/26/2024	N491 Poeppel Rd		\$200.00	\$40.00	\$160.00
20%	80%	building	new garage	9/19/2024	N950 Vinnie Ha Ha	Owner	\$200.00	\$40.00	\$160.00
20%	80%	building		9/18/2024			\$200.00	\$40.00	\$160.00
20%	80%	electrical	generator installati	9/6/2024	N407 Oxbow Bend	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	electrical	electrical service	9/6/2024	N1662 Pleasant Rd	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	electrical	generator installati	9/6/2024	N511 Blackhawk Bluff	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	building	NSFD	8/27/2024	N5129 Bark River Rd	JB Construction	\$1,166.25	\$233.25	\$933.00
20%	80%	building	NSFD	8/26/2024	303 Charley Bluff Rd	Owner	\$1,466.20	\$293.24	\$1,172.96
20%	80%	electrical	upgrade service	8/15/2024	N3525 Triloff Rd #10	Enterprise Electric	\$81.20	\$16.24	\$64.96
20%	80%	building	NSFD	8/15/2024	N121 Twinkling Star	Owner	\$1,235.00	\$247.00	\$988.00
20%	80%	early start	footings & foundati	7/22/2024	W5860 Tri Cty Rd	Owner	\$50.00	\$10.00	\$40.00
20%	80%	building	addition & remodel	7/8/2024	N633 Cowpath Ln	DeKrey Design	\$2,496.20	\$499.24	\$1,996.96
20%	80%	building	NSFD	7/8/2024	W5860 Tri Cty Rd		\$1,316.20	\$263.24	\$1,052.96
20%	80%	building	wedding venue bui	6/28/2024	W6770 Pond Rd	Owner	\$600.00	\$120.00	\$480.00
20%	80%	electrical	new service	6/26/2024	W5891 Hackbarth Rd	Jefferson Current Electric	\$81.20	\$16.24	\$64.96
20%	80%	building	new home	6/24/2024	N1536 Cty Rd K	Owner	\$1,566.20	\$313.24	\$1,252.96
20%	80%	building	deck	6/18/2024	N864 Twin Knolls	Owner	\$150.00	\$30.00	\$120.00
20%	80%	building	finish home	6/17/2024	W5725 Ralph Rd	Owner	\$200.00	\$40.00	\$160.00
20%	80%	building	home addition	5/28/2024	N1715 Cty Rd K	Lakeside Custom Building	\$690.00	\$138.00	\$552.00
20%	80%	electrical	rewire residence	5/28/2024	N1715 Cty Rd K	MD Solutions	\$81.20	\$16.24	\$64.96
20%	80%	electrical	rewire campsite	5/28/2024	N551 Wishing Well Ln	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	electrical	electrical service	5/28/2024	N435 Oxbow Bend	Ellefson Electric	\$81.20	\$16.24	\$64.96
20%	80%	building	new home	5/23/2024	N829 Long Dr	Tom Patterson	\$1,566.25	\$313.25	\$1,253.00
20%	80%	electrical	new service	5/22/2024	W7275 State Rd 106	Ready Electric	\$81.20	\$16.24	\$64.96

20%	80%	electrical	new service	5/20/2024	N807 Eagle Ridge Dr	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	electrical	new service	5/20/2024	N819 Eagle Ridge Dr	Ready Electric	\$81.20	\$16.24	\$64.96
20%	80%	electrical	rewire residence	5/10/2024	N1570 Cty Rd K	Midwest electric	\$81.20	\$16.24	\$64.96
20%	80%	early start	footings & foundati	4/29/2024	N1536 Cty Rd K		\$50.00	\$10.00	\$40.00
20%	80%	electrical	electrical service	4/26/2024	N255 Charley Bluff Rd	Electrical Solutions	\$81.20	\$16.24	\$64.96
20%	80%	electrical	generator	4/23/2024	W7631 Koshonong Lake Rc	Adams Electric	\$81.20	\$16.24	\$64.96
20%	80%	building		4/1/2024	N112 US Hwy 12		\$1,800.00	\$360.00	\$1,440.00
25%	75%	occupancy	occupancy approve	4/1/2024	N806 Eagle Ridge		\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	4/1/2024	N812 Eagle Ridge		\$0.00	\$0.00	\$0.00
25%	75%	building	new home	3/1/2024	N764 Waubunsee Trail		\$1,381.25	\$345.31	\$1,035.94
25%	75%	solar	solar	3/1/2024	N1597 Brooke Ln		\$231.25	\$57.81	\$173.44
25%	75%	solar	solar	3/1/2024	N1177 Old Hwy 26		#####	\$3,480.00	\$10,440.00
25%	75%	electrical	electrical service	3/1/2024	N632 Buckingham Rd		\$81.20	\$20.30	\$60.90
25%	75%	building	addition	2/1/2024	W6141 Star School Rd		\$250.00	\$62.50	\$187.50
25%	75%	electrical	sprinkler install	2/1/2024	W5527 Hwy 106		\$200.00	\$50.00	\$150.00
25%	75%	electrical	electrical service	2/1/2024	W7200 Cty Line Rd		\$106.20	\$26.55	\$79.65
25%	75%	electrical	electrical service	2/1/2024	W6354 Briar Ln		\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	2/1/2024	W2531 Turner Rd		\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	2/1/2024	N1975 Blackhawk Island Rd		\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	2/1/2024	1222 Van Buren St		\$81.25	\$20.31	\$60.94
25%	75%	electrical	electrical service	2/1/2024	N863 Old 26		\$81.20	\$20.30	\$60.90
25%	75%	occupancy	occupancy approve	2/1/2024	W6204 Star School Rd		\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	2/1/2024	N895 Long Dr		\$0.00	\$0.00	\$0.00
25%	75%	building	remodel	1/1/2024	W5527 State Rd 106		\$2,148.00	\$537.00	\$1,611.00
25%	75%	electrical	electrical service	1/1/2024	N615 Blackhawk Bluff Dr		\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	1/1/2024	W6863 Westphal Ln		\$125.00	\$31.25	\$93.75
25%	75%	electrical	electrical service	1/1/2024	W6920 Grogan Rd		\$162.40	\$40.60	\$121.80
25%	75%	electrical	electrical service	1/1/2024	W6996 Cty Line Rd		\$131.20	\$32.80	\$98.40
25%	75%	occupancy	occupancy approve	1/1/2024	N811 Eagle Ridge Dr		\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	1/1/2024	N876 Twin Knolls		\$0.00	\$0.00	\$0.00
25%	75%	electrical	electrical service	12/1/2023	W6301 Hackbarth Rd		\$78.00	\$19.50	\$58.50
25%	75%	electrical	electrical service	12/1/2023	W6996 Cty Line Rd		\$81.25	\$20.31	\$60.94
25%	75%	building	alteration	12/1/2023	W5141 State Rd 106		\$150.00	\$37.50	\$112.50

25%	75%	building	remodel	12/1/2023	1222 Van Buren	\$1,500.00	\$375.00	\$1,125.00
25%	75%	building	garage	12/1/2023	N1007 Vinnie Ha Ha	\$200.00	\$50.00	\$150.00
25%	75%	building	new home	12/1/2023	N828-N826 Eagle Ridge	\$2,262.25	\$565.56	\$1,696.69
25%	75%	building	new home	12/1/2023	N850 Twin Knolls	\$1,081.25	\$270.31	\$810.94
25%	75%	building	new home	11/1/2023	N868 Twin Knolls Dr	\$1,231.25	\$307.81	\$923.44
25%	75%	building	commercial buildir	11/1/2023	N2603 Kutz Rd	\$1,893.70	\$473.43	\$1,420.28
25%	75%	building	remodel	11/1/2023	N615 Blackhawk Bluff Dr	\$300.00	\$75.00	\$225.00
25%	75%	building	remodel	11/1/2023	N112 Hwy 12	\$480.00	\$120.00	\$360.00
25%	75%	building	deck	11/1/2023	W5814 Hackbarth Rd	\$200.00	\$50.00	\$150.00
25%	75%	electrical	electrical service	11/1/2023	W7527 Koshkonong Lake Rd	\$81.20	\$20.30	\$60.90
25%	75%	occupancy	occupancy approve	11/1/2023		\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	11/1/2023	N826 Long Dr	\$0.00	\$0.00	\$0.00
25%	75%	building	cell tower	10/1/2023	W6996 Cty Line Rd	\$1,050.00	\$262.50	\$787.50
25%	75%	building	addition	10/1/2023	N1917 S Main	\$250.00	\$62.50	\$187.50
25%	75%	electrical	electrical service	10/1/2023	W5056 Gillis Rd	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	10/1/2023	N2744 Cty Rd N	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	10/1/2023	N283 McMillan Rd	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	10/1/2023	W9634 Blackhawk Island Rd	\$81.20	\$20.30	\$60.90
25%	75%	occupancy	occupancy approve	10/1/2023	N1138 Old 26	\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	10/1/2023	N847 Long Dr	\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	10/1/2023	W5305 Cheesebrough Rd	\$0.00	\$0.00	\$0.00
25%	75%	solar	solar	9/1/2023	N518 Blackhawk Bluff	\$231.25	\$57.81	\$173.44
25%	75%	building	remodel	9/1/2023	W5941 Apple Ln	\$330.00	\$82.50	\$247.50
25%	75%	building	structure	9/1/2023	N2811 Monarch Ln	\$250.00	\$62.50	\$187.50
25%	75%	building	structure	9/1/2023	W6301 Hackbarth	\$200.00	\$50.00	\$150.00
25%	75%	building	shed	9/1/2023	W5891 Hackbarth Rd	\$200.00	\$50.00	\$150.00
25%	75%	building	shed	9/1/2023	W5833 Hedrick Dr	\$200.00	\$50.00	\$150.00
25%	75%	building	new home	9/1/2023	W7724 Koshkonong Ln	\$1,231.25	\$307.81	\$923.44
25%	75%	building	new home	9/1/2023	N831-N885 Eagle Ridge Dr	\$2,027.50	\$506.88	\$1,520.63
25%	75%	electrical	electrical service	9/1/2023	N1007 Vinnie Ha Ha	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	9/1/2023	N551 Wishing Well Ln	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	9/1/2023	N551 Wishing Well Ln	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	9/1/2023	N2498 Rock River Rd	\$81.20	\$20.30	\$60.90

25%	75%	electrical	electrical service	9/1/2023	W525 Old 26	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	9/1/2023	W6621 Grogan Rd	\$81.20	\$20.30	\$60.90
25%	75%	building	new home	8/1/2023	N812-N814 Eagle Ridge Dr	\$1,912.50	\$478.13	\$1,434.38
25%	75%	electrical	electrical service	8/1/2023	N497 Blackhawk Bluff	\$81.20	\$20.30	\$60.90
25%	75%	solar	solar	8/1/2023	N518 Blackhawk Bluff	\$231.25	\$57.81	\$173.44
25%	75%	building	detached garage	8/1/2023	N1602 Carlin Rd	\$200.00	\$50.00	\$150.00
25%	75%	building	garage/shed	8/1/2023	W6021 Friedel Rd	\$300.00	\$75.00	\$225.00
25%	75%	electrical	electrical service	7/1/2023	N121 Twinkling Star	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	7/1/2023	N1644 Poeppel Rd	\$81.20	\$20.30	\$60.90
25%	75%	building	deck	7/1/2023	W7440 Cty Line Rd	\$200.00	\$50.00	\$150.00
25%	75%	solar	solar pv	7/1/2023	N1626 S Main	\$231.25	\$57.81	\$173.44
25%	75%	solar	solar pv	7/1/2023	W5972 Dellette Ter	\$231.25	\$57.81	\$173.44
25%	75%	building	shed	7/1/2023	N699 Cold Spring Rd	\$500.00	\$125.00	\$375.00
25%	75%	building	deck	7/1/2023	N945 Vinnie Ha Ha	\$150.00	\$37.50	\$112.50
25%	75%	building	deck	7/1/2023	W5750 Ralph Rd	\$200.00	\$50.00	\$150.00
25%	75%	building	garage	7/1/2023	W6021 Friedel Rd	\$300.00	\$75.00	\$225.00
25%	75%	building	new home	7/1/2023	N809-N811 Eagle Ridge Dr	\$1,912.50	\$478.13	\$1,434.38
25%	75%	building	new home	7/1/2023	N804-N806 Eagle Ridge Dr	\$1,912.50	\$478.13	\$1,434.38
25%	75%	building	new home	6/1/2023	N138 Hwy 12	\$2,066.25	\$516.56	\$1,549.69
25%	75%	building	new home	6/1/2023	N876 Twin Knolls	\$1,531.25	\$382.81	\$1,148.44
25%	75%	building	addition	6/1/2023	W5125 Bark River Rd	\$200.00	\$50.00	\$150.00
25%	75%	building	addition	6/1/2023	W5842 Arbor Rd	\$150.00	\$37.50	\$112.50
25%	75%	building	remodel	6/1/2023	N527 Haight Rd	\$150.00	\$37.50	\$112.50
25%	75%	electrical	electrical service	6/1/2023	N1646 Shari Ln	\$81.20	\$20.30	\$60.90
25%	75%	building	commercial buildir	5/1/2023	N1140 Old Hwy 26	\$5,500.00	\$1,375.00	\$4,125.00
25%	75%	building	deck	5/1/2023	N883 Long Dr	\$150.00	\$37.50	\$112.50
25%	75%	building	new home	5/1/2023	N876 Twin Knolls	\$1,531.25	\$382.81	\$1,148.44
25%	75%	building	new home	5/1/2023	W7234 Cty Rd C	\$1,231.25	\$307.81	\$923.44
25%	75%	electrical	electrical service	5/1/2023	N551 Wishing Well Ln	\$81.20	\$20.30	\$60.90
25%	75%	occupancy	occupancy approve	5/1/2023	W6204 Star School Rd	\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	5/1/2023	N2494 Rock River Rd	\$0.00	\$0.00	\$0.00
25%	75%	building	new home	4/1/2023	N847 Long Dr	\$1,381.25	\$345.31	\$1,035.94
25%	75%	building	new home	4/1/2023	N862 Long Dr	\$1,381.25	\$345.31	\$1,035.94

25%	75%	building	new home	4/1/2023	N895 Long Dr	\$1,381.25	\$345.31	\$1,035.94
25%	75%	building	addition	4/1/2023	N883 Long Dr	\$150.00	\$37.50	\$112.50
25%	75%	building	addition	4/1/2023	N1618 S Main St	\$200.00	\$50.00	\$150.00
25%	75%	building	addition	4/1/2023	W6886 Cty Line Rd	\$625.00	\$156.25	\$468.75
25%	75%	building	addition	4/1/2023	W7170 Cty Line Rd	\$150.00	\$37.50	\$112.50
25%	75%	building	remodel	4/1/2023	N525 Old Hwy 26	\$200.00	\$50.00	\$150.00
25%	75%	building	cell tower	4/1/2023	W5633 Hoge Rd	\$250.00	\$62.50	\$187.50
25%	75%	electrical	electrical service	4/1/2023	N1762 Cty Rd K	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	4/1/2023	N2191 Falk Rd	\$81.20	\$20.30	\$60.90
25%	75%	occupancy	occupancy approve	4/1/2023	N717 McIntyre Rd	\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	4/1/2023	N821 Long Dr	\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	4/1/2023	N1538 Hwy K	\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	4/1/2023	7910 Cty Line Rd	\$0.00	\$0.00	\$0.00
25%	75%	electrical	electrical service	3/1/2023	N1064 Vinnie Ha Ha	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	3/1/2023	N1534 Shari Ln	\$81.20	\$20.30	\$60.90
25%	75%	building	remodel	3/1/2023	N1877 Grant St	\$250.00	\$62.50	\$187.50
25%	75%	occupancy	occupancy approve	3/1/2023	N820 Long Dr	\$0.00	\$0.00	\$0.00
25%	75%	electrical	electrical service	2/1/2023	1734 S Main St	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	2/1/2023	N415 lot #7 Twinkling Star Rd	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	2/1/2023	N2111 Falk Rd	\$81.20	\$20.30	\$60.90
25%	75%	electrical	electrical service	2/1/2023	N2111 Falk Rd	\$81.20	\$20.30	\$60.90
25%	75%	solar	solar panel install	2/1/2023	W7008 Pond d	\$231.20	\$57.80	\$173.40
25%	75%	solar	solar panel install	2/1/2023	W5714 Hoge Rd	\$231.20	\$57.80	\$173.40
25%	75%	building	new home	1/1/2023	N640 NH (Andy Chupp)	\$1,078.00	\$269.50	\$808.50
25%	75%	building	cell tower	1/1/2023	W5633 Hoge Rd	\$250.00	\$62.50	\$187.50
25%	75%	occupancy	occupancy approve	1/1/2023	N882 Long Dr	\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	1/1/2023	N888 Long Dr	\$0.00	\$0.00	\$0.00
25%	75%	occupancy	occupancy approve	1/1/2023	N1617 Cty Rd K	\$0.00	\$0.00	\$0.00



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Jedidiah Draeger, Director of Neighborhood and Building Services

RE: Review and possible action relating to an Extraterritorial Certified Survey Map for the property located at W6116 Star School Road in the Town of Koshkonong (Draeger, Director of Neighborhood and Building Services)

BACKGROUND

The property owner would like to break off a 2-acre parcel from the parent parcel along Star School Road in the Town of Koshkonong without road right of way. This is within the 3-mile extraterritorial area of the City of Fort Atkinson and also within the 1.5-mile radius requiring a recommendation from the Plan Commission and approval by the City Council. The owner received approval from Jefferson County on January 1, 2025 to rezone the parcel from A-1 to A3, pending approval of the CSM.

DISCUSSION

The parcel lies outside the City's Potential Long-Range Urban Growth Area. The applicant proposes to rezone a 2-acre portion of the existing 37.67-acre vacant parcel from A-1 to A-3 to allow for the construction of a new residence. Staff does not anticipate that this land division will impact the City's long-range growth plans. Overall, staff finds the proposed Certified Survey Map consistent with the City's Land Division and Development Ordinance, with the exception of public right-of-way dedication and three minor mapping corrections that must be addressed on the Final CSM.

Per Ch. 236, Wis. Stats. and Ch. A-E7, Wis. Admin Code:

s. 236.20(2)(c) Add an arrow to leader the 33.07' distance into the road right-of-way in the southwest corner of the CSM.

s. 236.20(3)(b) Tie line: describe the Section, Town and Range of the USPLSS corners at the ends of the tie line.

s. 236.34(1m)(d) Surveyor's Certificate: In the final paragraph, add the phrase that the map is a correct representation of the boundary surveyed and the division thereof

The Town of Koshkonong and the Jefferson County Zoning Department have indicated they do not intend to require the right-of-way dedication.

FINANCIAL ANALYSIS

There is no financial impact on the City as a result of this CSM.

RECOMMENDATION

The Plan Commission reviewed this item at the meeting on December 9th and recommended that the City Council approve this extraterritorial certified survey map, subject to the correction of the three mapping errors listed in the memo and waiving the requirement for the road dedication. Staff recommends the same.

ATTACHMENTS

1. Plan Commission Memorandum
2. CSM
3. Location Map
4. Location Map_2
5. Karow County Approval



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

CERTIFIED SURVEY MAP (EXTRA-TERRITORIAL) REPORT TO THE PLAN COMMISSION

DATE: December 9, 2025
PROPERTY ADDRESS: W6116 Star School Road
PARCEL NUMBER: 016-0514-2111-000
OWNER: Dale Karrow
APPLICANT: Kate and Evan Karrow

FILE NUMBER: CSM-2025-13
EXISTING ZONING: A-1 (Jefferson County Zoning)
PROPOSED ZONING: A-3 (Jefferson County Zoning)
EXISTING LAND USE: Agriculture
REQUESTED USES: Rural Residential

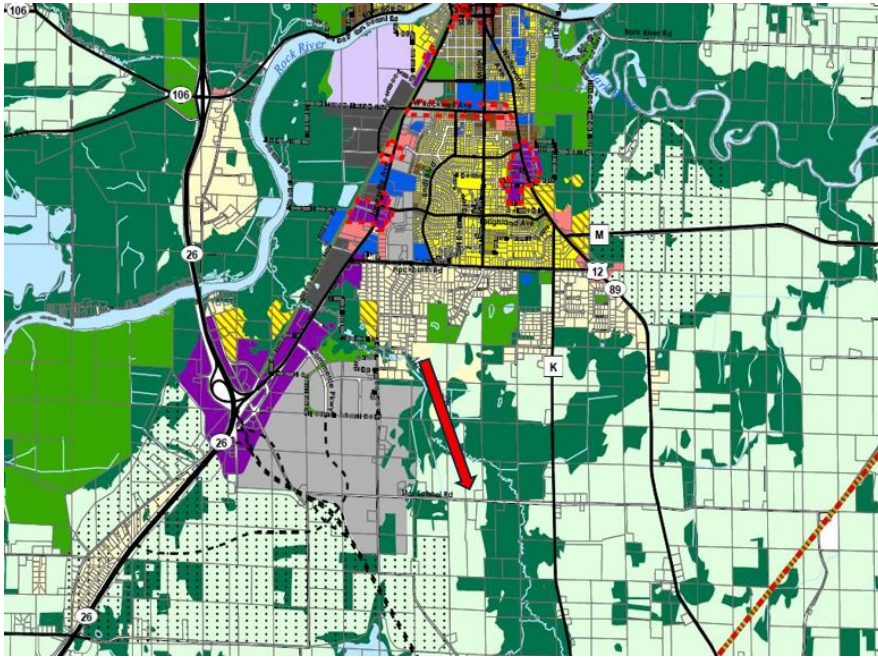
BACKGROUND

The property owner would like to break off a 2 acre parcel from the parent parcel along Star School Road in the Town of Koshkonong without road right of way. This is within the 3-mile extraterritorial area of the City of Fort Atkinson and also within the 1.5-mile radius requiring a recommendation from the Plan Commission and approval by the City Council. The owner received approval from Jefferson County on January 1, 2025 to rezone the parcel from A-1 to A-3, pending approval of the CSM.

REQUEST OVERVIEW

[COMPREHENSIVE LAND USE PLAN \(2023-Update\):](#)

The [Future Land Use](#) map indicates this area as Agricultural/Rural. Defined as, Agricultural uses, farmsteads, and rural housing with low non-farm (housing) development densities in line with Jefferson County's farmland preservation policies.



City staff find that the proposed Certified Survey Map for the 2-acre parcel to be zoned A-3 is consistent with the goals of the Comprehensive Plan.

CITY OFFICIAL MAP (2021):

There are no mapped features within the area on the [City's Official Map](#).

Public Notice is not required for the review of a Certified Survey Map

DISCUSSION

The parcel is located outside the City's Potential Long-Range Urban Growth Area. Evan and Kate Karrow are requesting to create a new 2-acre parcel and rezone it from the current A-1 designation to A-3, allowing for the construction of a new residence. The proposed division would separate the 2-acre parcel from the existing 37.67-acre parcel, which is currently vacant land. Staff does not anticipate that this land division will negatively affect the City's long-range growth plans.

Staff find that the proposed Certified Survey Map is consistent with the requirements of the City's Land Division and Development Ordinance, except for the dedication of public right-of-way along Star School Road. The Town of Koshkonong and the Jefferson County Zoning Department do not intend to require the dedication.

RECOMMENDATION

Staff recommends that the Plan Commission recommend the City Council waive the requirement for the road dedication and approve the Certified Survey Map.

ATTACHMENTS

1. CSM
2. Location Map
3. Location Map_2
4. Karow County Approval

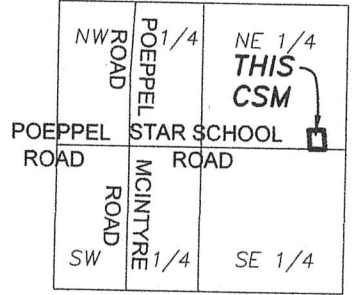
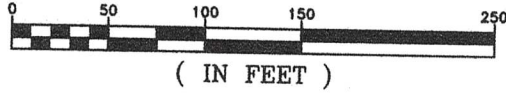
CERTIFIED SURVEY MAP No. _____

BEING A PART OF LOT 2 OF CERTIFIED SURVEY MAP NO. 2386,
 LOCATED IN THE SE 1/4 OF THE NE 1/4 OF SECTION 21, T5N, R14E,
 TOWN OF KOSHKONONG, JEFFERSON COUNTY, WISCONSIN.

COPY



GRAPHIC SCALE



LOCATION SKETCH
 SECTION 21, T5N, R14E
 NOT TO SCALE

LEGEND

- 3/4" IRON REBAR FOUND w/ORANGE PLASTIC CAP STAMPED 'J.C. KANNARD P.L.S. S-2248'
- 1" I.D. IRON PIPE FOUND
- 3/4"x18" IRON REBAR (1.502 lbs/lin ft) w/ORANGE PLASTIC CAP STAMPED 'J.C. KANNARD P.L.S. S-2248' SET
- SECTION CORNER FOUND AS NOTED
- SOIL BORING
- RECORDED AS

BEARING BASIS:

ALL BEARINGS REFER TO THE EAST-WEST 1/4 LINE WHICH HAS AN ASSUMED BEARING OF N87°26'11"W

LOT 1
 CSM #2386

LOT 2
 CSM #2386

S87°26'11"E 271.34'

LOT 1

96,275 SQ. FT. GROSS
 2.210 ACRES GROSS
 87,118 SQ. FT. NET
 2.000 ACRES NET

Petition # R4574A-24 Zoning A-3
 Check for subsequent zoning changes
 with Jefferson County Zoning

SE CORNER, NE 1/4
 ALUMINUM MONUMENT
 OF RECORD

SW CORNER, NW 1/4
 LIMESTONE MONUMENT
 OF RECORD

S02°18'40"E(R) 2306.89'
 N01°09'11"W 318.31'
 S02°18'40"E(R) 279.55'
 N01°09'11"W 351.38'

S02°12'08"E 318.74'
 N03°21'17"W 285.53(R)
 N02°12'08"W 285.61'

LOT 1
 CSM #1806

APPROVED ACCESS

S88°36'08"E(R) 277.19'
 N87°26'11"W 277.80'
 S88°36'08"E(R) 67.23'

EAST-WEST 1/4 LINE P.O.B.
 N87°26'11"W 277.80'
 S88°36'08"E(R) 381.36'

LOT 3
 LOT 2
 LOT 1
 CSM #2629



Handwritten signature of John C. Kannard

SOUTHWEST

SURVEYING & ASSOCIATES, Inc.

W1065 COUNTY ROAD CI, HELENVILLE, WI. 53137
 262-495-4910
 920-674-4884

Owner:
 Dale Karow
 W6116 Star School Road
 Fort Atkinson, WI 53538

JOB No.: K-224142
 DATE: NOVEMBER 12, 2025
 SHEET 1 OF 2

CERTIFIED SURVEY MAP No. _____

BEING A PART OF LOT 2 OF CERTIFIED SURVEY MAP NO. 2386, LOCATED IN THE SE 1/4 OF THE NE 1/4 OF SECTION 21, T5N, R14E, TOWN OF KOSHKONONG, JEFFERSON COUNTY, WISCONSIN.

SURVEYOR'S CERTIFICATE

I, John C. Kannard, Professional Land Surveyor No. 2248, hereby certify:

That I have surveyed, divided, mapped this Certified Survey Map being a part of Lot 2 of Certified Survey Map No. 2386, located in the SE 1/4 of the NE 1/4 of Section 21, T5N, R14E, Town of Koshkonong, Jefferson County, Wisconsin, bounded and described as follows:

Commencing at the Aluminum Monument that marks the Southeast corner of the NE 1/4 of said Section 21; Thence N87°26'11"W, along the East-West 1/4 line, a distance of 381.36 feet, to the POINT OF BEGINNING of the lands to be described: Thence continue N87°26'11"W, along said East-West 1/4 line, a distance of 277.80 feet, to the Southwest corner of Lot 2 of Certified Survey Map No. 2386 as recorded in the Jefferson County Register of Deeds Office, in Volume 8 of Certified Survey Maps on Pages 233 & 234, as Document No. 863365, Thence N01°09'11"W, along the West line of said Lot 2, a distance of 351.38 feet, to a Set 3/4"x18" Iron Rebar (1.502 lbs/ lin ft) with an orange plastic cap stamped "J.C. Kannard P.L.S. S-2248" (Set 3/4" Rebar); Thence S87°26'11"E, a distance of 271.34 feet, to a Set 3/4" Rebar; Thence S02°12'08"E, a distance of 351.86 feet, to the POINT OF BEGINNING, containing 96,275 square feet or 2.210 acres of land, more or less.

Subject to all rights, reservations, restrictive covenants and easements of record.

I further certify that I have made this survey and map under the direction of Dale Karow, owner of said lands, and that this Certified Survey Map is a correct representation of the boundary surveyed and described and that I have complied fully with the provisions of Chapter 236.34 of the State of Wisconsin Statutes, Town of Koshkonong Code of Ordinances, City of Fort Atkinson Land Division and Development Ordinance, and the Subdivision Ordinance of Jefferson County, Wisconsin in surveying and mapping same.

Certified this 12th day of November, 2025


John C. Kannard, P.L.S. 2248



TOWN OF KOSHKONONG APPROVAL:

This Certified Survey Map is hereby approved by the Town of Koshkonong Town Board.

Dated this ____ day of _____, 2025

Kim Cheney, Town Chair

CITY OF FORT ATKINSON EXTRATERRITORIAL APPROVAL:

This Certified Survey Map is hereby approved by the City of Fort Atkinson.

Dated this ____ day of _____, 2025

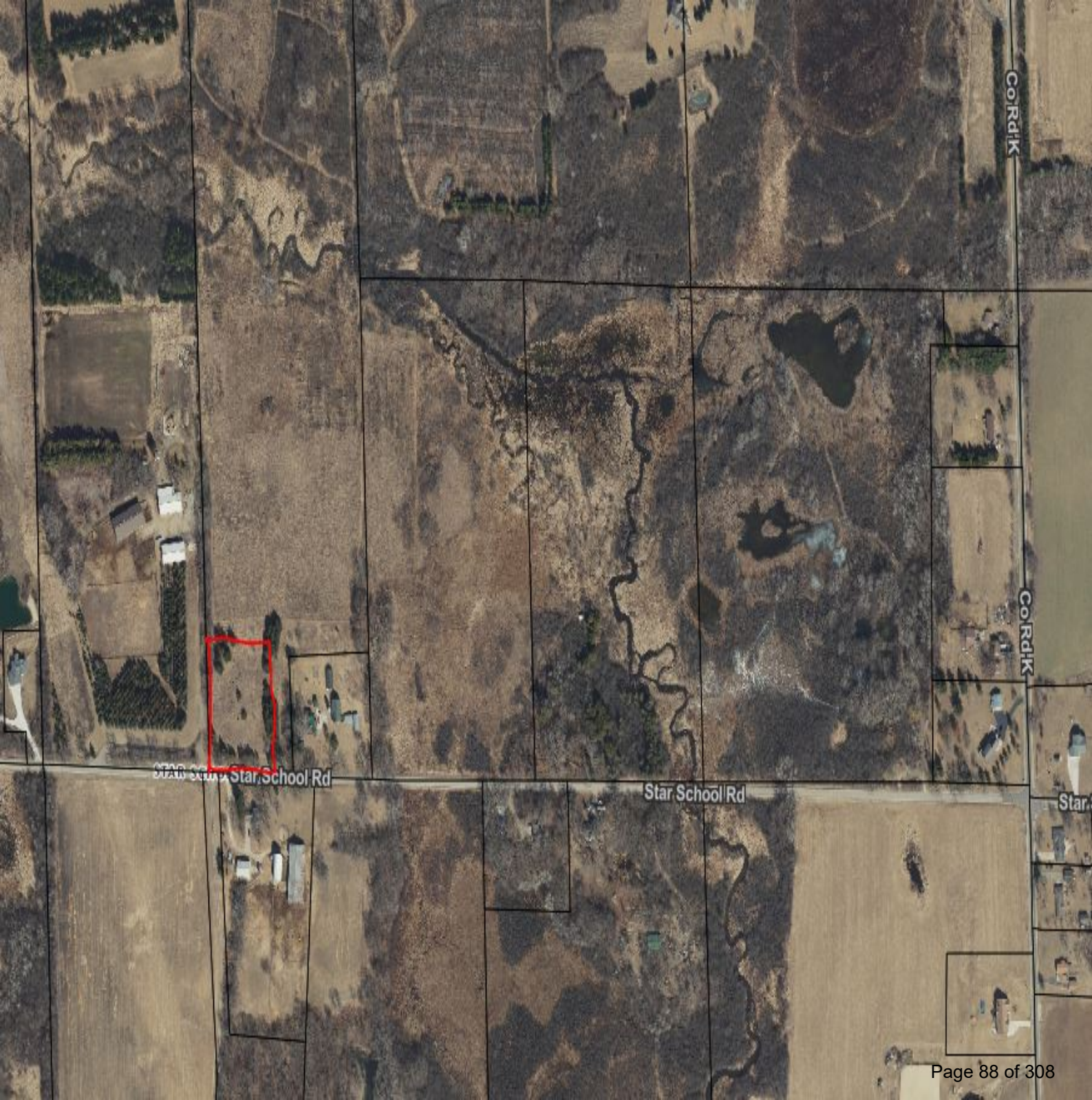
Rebecca Houseman, City Manager

PLANNING AND ZONING COMMITTEE APPROVAL:

This Certified Survey Map is hereby approved by the Planning and Zoning Committee of Jefferson County.

Dated this ____ day of _____, 2025

Matt Zangl, Director of Planning & Zoning



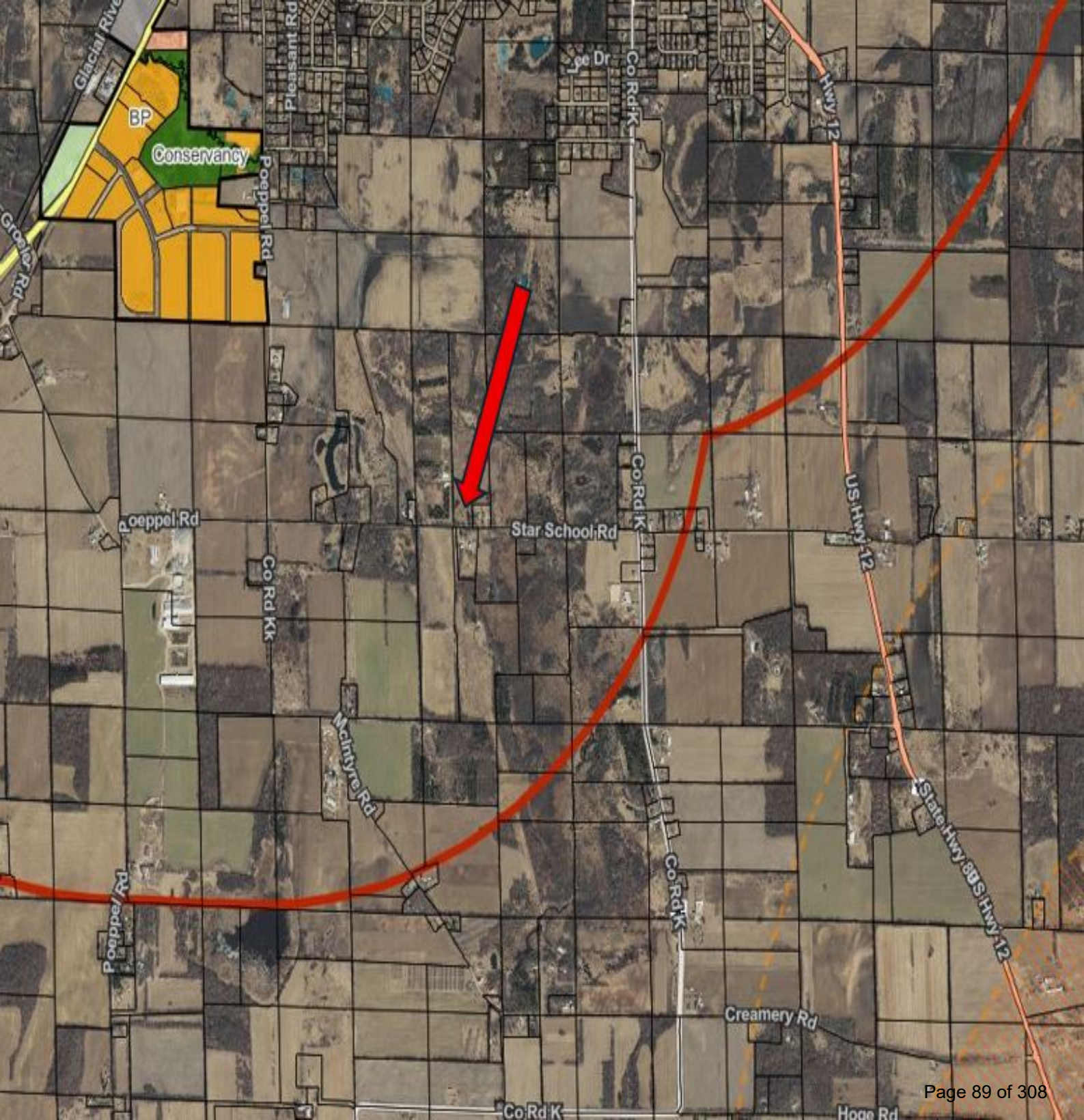
0720 Star School Rd

Star School Rd

Co Rd 1K

Co Rd 1K

Star



**DECISION OF THE JEFFERSON COUNTY
PLANNING & ZONING COMMITTEE/COUNTY BOARD
ZONING AMENDMENTS**

I. FINDINGS OF FACT:

Petition #: R4574A-24 Township: Koshkonong
Site Inspection Date: 12-13-2024 Hearing Date: 12-19-2024
Petitioner Name: Evan & Kate Karow
Property Owner(s): Dale W Karow
Property Location: Directly west of W6116 Star School Rd

REZONING REQUEST:

A-1 to A-3 to create a 2-acre lots

PARCEL(S) (PIN#): 016-0514-2111-000 (37.67ac)

PARENT PARCEL(S):(See attached map) PARCEL OF RECORD:(See attached map)

TOTAL CONTIGUOUS A-1 ACRES 37.67 Less than 50 More than 50

PREVIOUS A-3 LOTS CREATED FROM PARENT PARCEL: 0

LOTS AVAILABLE: Non Prime 3 or Prime 1

LOTS REQUESTED: (1) 2-acre A-3 residential building site

AGRICULTURAL PRESERVATION LIMITED SERVICE AREA LONG RANGE URBAN SERVICE AREA
 ENVIRONMENTAL CORRIDOR 15 YEAR GROWTH AREA RURAL HAMLET

SOIL TYPES: BpB, BoC

Class I 0 % Class II 0 % Class III 10 % Class III Non-Prime 90 %

Class IV 0 % Class V-VII 0 %

Cropland 0 % Woods 0 % Fallow/Pasture 100 % Existing Yard 0 % Slope 0-20 %

FLOODPLAIN WETLANDS SHORELAND

ADJACENT LAND USE: A-1, Exclusive Agricultural; A-3, Agricultural/Rural-Residential

COMMENTS/ADDITIONAL INFORMATION RECEIVED AT PUBLIC HEARING:

TOWN BOARD RECOMMENDATION 11-13-2024 Granted Denied Tabled Not Received
Date

Note: Town Board recommendation does not constitute final county action. See Sec. III Order & Determination (pg. 2)

II. CONCLUSIONS

BASED UPON THE FINDINGS OF FACT, THE AMENDMENT FILE, SITE INSPECTION, PUBLIC HEARING, ZONING ORDINANCE, AND THE AGRICULTURAL PRESERVATION AND LAND USE PLAN, THE PLANNING & ZONING COMMITTEE CONCLUDES THAT THE PROPOSED ZONING AMENDMENT **Complies** **Does Not Comply**

AS A PRIME LOT _____ NON-PRIME LOT X LOT COMBINATION _____ FARM CONSOLIDATION _____
FOR THE FOLLOWING REASONS: Lots will be clustered, utilizing non-prime soils. Design meets plan
and will allow access to remaining A-1 land.

The Jefferson County Planning and Zoning Committee finds this amendment meets the standards of 91.48 Wisconsin State Statutes and 11.11(c)6 of the Jefferson County Zoning Ordinance.

DECISION **III. ORDER & DETERMINATION** **DECISION**
Based on the findings of fact conclusions and the record herein, the committee recommends to the Jefferson County Board of Supervisors that the amendment be: **Granted** **Denied** **Postponed**
Motioned by: Poulson 2nd by: Foelker Abstained _____
Vote: 5-0 Date: 12-30-24

Note: If postponed, this amendment is not forwarded to the Jefferson County Board of Supervisors for action and may be required to go back to a public hearing.

Based on the Planning and Zoning Committee recommendation the Jefferson County Board of Supervisors:
 Granted **Denied** **Postponed** Date: 1-14-25

If the requested amendment was granted, it is subject to the following: *(Check all that apply)*

- ACCESS APPROVAL BY MAINTAINING AUTHORITY
- RECEIPT OF SUITABLE SOIL TEST
- RECEIPT OF AND RECORDING OF THE FINAL CSM
- EXTRATERRITORIAL PLAT REVIEW
- REZONING SHALL BE NULL & VOID & OF NO EFFECT ONE YEAR FROM THE DATE OF COUNTY BOARD APPROVAL UNLESS ALL APPLICABLE CONDITIONS HAVE BEEN COMPLETED BY THAT DATE
- OTHER _____

FILING OF AFFIDAVIT OF ZONING STATUS ON REMAINING LANDS
(SEE ATTACHED INSTRUCTION SHEET)

DATE: _____ SIGNATURE: _____



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action relating to a request from the Wisconsin Economic Development Corporation (WEDC) to return unused Capital Catalyst Revolving Loan funds (Houseman, City Manager)

BACKGROUND

The City of Fort Atkinson received a \$300,000 Capital Catalyst Grant on September 17, 2020 from the Wisconsin Economic Development Corporation to capitalize and manage an Investment Seed Fund to make awards to high-growth startups and emerging growth companies in the City of Fort Atkinson. The City matched the grant amount, for a total of \$600,000. The City created the Capital Catalyst Loan Fund (Fund 21) to provide revolving loans to new businesses and those less than five years old of up to \$100,000 with as low as a 2% interest rate.

DISCUSSION

The fund has supported six loans as of the date of this memo as outlined in the table below.

INITIAL INVESTMENT	Initial Investment Revenue	Initial Investment Source
	\$ 300,000.00	City of Fort Atkinson
	\$ 300,000.00	WEDC CC Grant
TOTAL:	\$ 600,000.00	
LOANS	Loan Amount	Company Name
2022-PT01	\$ 100,000.00	Pete's Tire/RJ 2, LLC
2022-BB02	\$ 15,000.00	Papa Brunk's Bakery
2023-OT03	\$ 100,000.00	Oak Tree Child & Family Services (ANZK Rentals, LLC)
2023-LH04	\$ 100,000.00	Lil Hawks Academy Too
2023-SS05	\$ 82,000.00	Sweet Spot Bakery
2024-LRPP06	\$ 50,000.00	Little Rainbows Play Place
TOTAL:	\$ 447,000.00	
INITIAL FUNDS REMAINING:	\$ 153,000.00	

\$153,000 of the initial funds for the loan program remains in Fund 21.

The Grant Agreement required all funds be awarded within 18 months of the date of disbursement (10/7/21) of the grant funds to the City. A contract amendment executed on September 12, 2024 revised that deadline to be 40 months from the date of disbursement, effectively extending the deadline to 2/7/2025.

As shown above and reported to WEDC, a total of \$447,000 has been awarded to eligible businesses through 8/19/2024, leaving a balance of initial deposits in the Investment Seed Fund of \$153,000. Given that the deadline has passed, and there are no imminent awards to be made, one-half of the balance of the fund, or \$76,500 has been requested to be returned to WEDC.

FINANCIAL ANALYSIS

If the City Council approves the request to return half of the remaining funds (\$76,500) to WEDC, there will still be \$76,500 in the CCRLF (Fund 21) for disbursement to new loan award winners. In addition, the loaned \$447,000, plus interest payments, will eventually be returned to the fund for redeployment. Thrive ED/JCEDC administers the loan program and contracts for underwriting services. The City's Economic Development Commission and Loan Review Committee are tasked with reviewing and approving loan applications, with the assistance of the underwriter and Thrive ED/JCEDC staff.

WEDC has indicated that they will provide the City with an invoice for \$76,500. Staff is seeking authorization to pay that invoice from the Council now, as it would be advantageous to complete the transaction before the end of 2025. As of the date of this memo, staff had not received the invoice.

More information about the City's CCRLF can be found on the City's website: https://www.fortatkinsonwi.gov/government/boards_and_commissions/economic_development_commission.php.

RECOMMENDATION

Staff recommends that the City Council approve the payment of \$76,500 to the WEDC, representing half of the remaining undeployed funds from the City's Capital Catalyst Revolving Loan Fund.

ATTACHMENTS

None



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Rebecca Houseman, City Manager

RE: Review and possible action to authorize the City Manager to execute the 2026 Joint Powers Agreement with Jefferson County for the County 911 Emergency System (Houseman, City Manager)

BACKGROUND

Annually, Jefferson County seeks action from the County's municipalities to enter into a "Joint Powers Agreement" for the County 911 emergency system. The Agreement states that if an emergency services vehicle is dispatched in response to a 911 call for service through the County's dispatch system, that vehicle and its personnel will render aid to the persons needing such aid or services, regardless of whether the vehicle is operating inside or outside the vehicle's normal jurisdictional boundaries.

DISCUSSION

Executing this Joint Powers Agreement will allow for City of Fort Atkinson emergency vehicles to respond outside of their jurisdiction when dispatched with impunity. It also allows for other municipal emergency service providers to respond within the City when dispatched through the County's 911 system.

This Agreement is required per State Statutes when the County has implemented a 911 system, as Jefferson County has done, and is necessary to provide emergency services to those in need, regardless of jurisdictional boundaries.

FINANCIAL ANALYSIS

There are no costs associated with this Agreement.

RECOMMENDATION

Staff recommends that the City Council authorize the City Manager to execute the Joint Powers Agreement for 2026.

ATTACHMENTS

1. Joint Powers Agreement

Office of the Sheriff - Jefferson County

411 S. Center Avenue, Jefferson, WI 53549



Travis W. Maze, Sheriff

Jerry A. Haferman, Undersheriff

CHAD ROBERTS
JAIL CAPTAIN



MATTHEW KANTERS
PATROL CAPTAIN



MARGARETA GRAY
ADMINISTRATIVE CAPTAIN



November 20, 2025

RECEIVED

DEC 01 2025

CITY OF FORT ATKINSON
CITY MANAGER

Honorable Mayor/Chairperson/President/City Manager:

Re: 911 Joint Powers Agreement

Wisconsin Statute 256.35(9)(a)(b) requires that a 911 Joint Powers Agreement be executed and filed with the Attorney General's office on a yearly basis.

The Mayor/Chairperson/President/City Manager of a municipality, town, or village must sign and return the enclosed Joint Powers Agreement to me. At that time, I will endorse the agreement and have the original signed by the Jefferson County Clerk as well. As required by Wisconsin Statute 256.35(9)(c), the original document will then be filed with the Attorney General's office and a copy, with signatures, will be returned to you for your files.

If you have any questions, please feel free to contact me at 920.674.7329.

Sincerely,

A handwritten signature in black ink, appearing to read "Travis W. Maze".

Travis W. Maze
Sheriff

Enclosure

**JOINT POWERS AGREEMENT
COUNTY 911 EMERGENCY SYSTEM**

WHEREAS, Jefferson County and the municipalities located within the boundaries of Jefferson County have implemented an Emergency 911 System for the purposes of providing emergency services to residents and visitors of these municipalities, including fire fighting, law enforcement, ambulance, medical and other emergency services; and

WHEREAS, Sec. 256.35(9)(a)(b), Wis. Stats. "Joint Powers Agreement," requires that in implementing a 911 system as has been done in Jefferson County, municipalities shall annually enter into a Joint Powers Agreement, in which Agreement shall be applicable on a daily basis and which shall provide that if an emergency services vehicle is dispatched in response to a request through the Jefferson County 911 System, such vehicle shall render its service to the persons needing the services, regardless of whether the vehicle is operating outside the vehicle's normal jurisdictional boundaries.

THEREFORE, in consideration of the mutual promises, agreements, and conditions contained herein, it is hereby jointly agreed between Jefferson County and the **City of Fort Atkinson, Wisconsin** as follows:

1. Effective as of January 1, 2026, this Agreement shall, thereafter, be applicable on a daily basis for one year.
2. That if an emergency services vehicle operated by the municipality, or operated by an agency with which the municipality contracts for that particular emergency services, is dispatched in response to a request through the Jefferson County Emergency 911 System, such vehicle (whether owned and operated by the municipality or by the agency) shall render its services to the persons needing the services, regardless of whether the vehicle is operating outside the vehicle's normal jurisdictional (or as defined by contract) boundaries.
3. That a copy of this Agreement shall be filed with the State Department of Justice, as required by Sec. 256.35(9)(c), Wis. Stats.

JEFFERSON COUNTY (Dispatching agency)

By:  dated: 11-20-25
Travis W. Maze, Sheriff

JEFFERSON COUNTY CLERK

By: _____ dated: _____
Audrey McGraw

CITY OF FORT ATKINSON (Participating agency)
(Town/City/Village of)

By: _____ dated: _____
Rebecca Houseman, City Manager



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Tom Williamson, Public Works Superintendent

RE: Review and possible action relating to the Proposal for Public Tree Inventory and Urban Forestry Management Plan (Williamson, Superintendent of Public Works)

BACKGROUND

Pursuant to the City of Fort Atkinson's approved Comprehensive Plan, the Department of Public Works is, in part, responsible for the health and welfare of several areas of the community. One of these areas is the tree canopy within the city-owned lands. The City's tree canopy is an important natural resource requiring active management and care. Chapter 4 of the Comprehensive Plan recommends maintaining the status of "Tree City" through the Department of Natural Resources.

In support of the Comprehensive Plan and the Tree City status, staff in the Public Works - Operations Division budgeted funds in the 2025 and 2026 in the operating budgets for the development and preparation of an Urban Forestry Management Plan to assist staff with managing the City's public tree canopy. This plan will help the Division with future applications for, and awards, of available State and Federal grant funds; assist with current care and management of the tree canopy; future planning and scheduling of regular maintenance programs; and the development of a more biologically diverse replanting program.

DISCUSSION

Staff prepared a request for proposal (RFP) to solicit proposals for the evaluation and preparation of a citywide long-term Urban Forest Management Plan. This RFP was completed and transmitted to four State of Wisconsin DNR certified and recommended providers, shown in the table below:

2025 City Urban Forestry Plan RFP				
RFP Recipients List				
Firm Name	Address	Contact Name	Phone No.	Email
Davey Resource Group	910 Riverside Dr. Suite 5, Elmhurst, IL 60126	Pete Sorensen	414-517-1695	peter.sorensen@davey.com
First Choice Tree Care, Inc.	P.O. Box 175, Stevens Point, WI 54481	Ken Ottman	414-254-5604	ken@firstchoicetreecare.com
Great Lakes Urban Forestry, Inc.	1485 Louis Bork Dr., Unit 113, Batavia, IL 60510	Jon Carlson	719-425-1131	jon@gluf.net
Wachtel Tree Service, Inc.	P.O. Box 716, Merton, WI 53056	Nathan Schuettpeltz	262-538-1900	nates@wachteltree.com

From this list of transmitted recipients, staff received one (1) completed submittal. Great Lakes Urban Forestry, Inc. submitted a proposal including two (2) completed plan examples, all of which are included with this memo.

FINANCIAL ANALYSIS

The total cost of the project proposal submitted by Great Lakes Urban Forestry, Inc. is \$13,040.00. The Operations Division approved budget for 2025 included line item in the amount of \$10,000.00 for this proposed urban forestry plan and the 2026 approved budget included \$2,500.00 for the completion of the proposed urban forestry plan. The remaining \$540.00 will be paid for using other operational funds, such as the operational supplies account.

RECOMMENDATION

Staff recommends the Council approve the contract for the evaluation and preparation of a **Public Tree Inventory and Urban Forestry Management Plan** with Great Lakes Urban Forestry, Inc. in the amount of \$13,040.00 and authorize the City Manager to execute the contract.

ATTACHMENTS

1. RFP 2025-26 Urban Forestry Plan
2. Ft_Atkinson_Tree_Inventory_UFMP_Proposal_11_13_25
3. SAMPLE_Kewanee_UFMP_
4. SAMPLE_Cicero_UFMP_FINAL_11_12_25



CITY OF FORT ATKINSON, WI RFP CITY WIDE URBAN FORESTRY EVALUATION AND PLAN

Contact: Tom Williamson – 920-397-9909 twilliamson@fortatkinsonwi.gov

Proposal Deadline: November 13, 2025, at 12 PM – email proposals only.

1. PROJECT OVERVIEW

This is a Request for Proposals (RFP) for the evaluation and preparation of an Urban Forestry Plan to be provided to the City of Fort Atkinson, Wisconsin. The consultant chosen will be expected to provide a State of Wisconsin Certified Urban Forester to review the City of Fort Atkinson existing publicly owned tree canopy, develop a 10 year care plan, and prepare a formal urban forestry plan for city use. The plan documents should be transmitted to the City of Fort Atkinson Department of Public Works Director and the Public Works Superintendent of Operations as 3 hard print copies and in PDF format on a zip drive.

The City has identified the need for a more comprehensive approach to managing the tree canopy within the City of Fort Atkinson and recognizes an Urban Forestry Plan will assist in our efforts. City staff have developed a list of required items for preparation of a proposal.

2. EXISTING DATA

The City will provide the selected firm with current GIS data, and any stored file data pertinent to completing the requisite plan.

3. REQUIRED SCOPE OF WORK

The proposal should include the following:

- a. An initial meeting with the City Public Works Department management staff to gather input on the expected final submission.
- b. Any required survey data collection needed.
- c. Full and thorough review of all provided and collected data.
- d. Complete 10 year Forestry Management Report and Plan.

4. SCHEDULE

The final plan should be completed and a submittal package prepared by June 2026. Consultants should provide a proposed data collection, research and review schedule with major milestone dates in their proposal.

5. PROPOSAL FORMAT

Approach to Work – (1 page or less) your best pitch, what differentiates you from competitors, be succinct.

Project Team – (1 page or less) abbreviated bios of the main staff tasked with interacting with the City on the project.

Examples of Work – provide **weblinks only** to 2 recent similar sized projects for similar clients.

Scope of Work – (1 page) – detail a scope among the work areas noted in the required scope of work. Outline separately the Deliverables and Assumptions under each of the work areas.

Fees – (1 page) provide the total budget with estimated hours by individual. Please include a current hourly rate table and assumed reimbursable costs.

Schedule – detail the major design milestones to be completed – broad overview not a detailed schedule.

6. PROPOSAL DEADLINES

- a. Proposal Deadline: **November 13 – 12 PM**
- b. Proposals should be submitted in PDF format via email.
- c. Questions asked 1 week prior to the deadline may not be answered.
- d. Selection notification will be made to all bidders within 1 week of proposal submission.

7. PROPOSAL EVALUATION

Proposals will be objectively evaluated based upon the submitted materials. The City reserves the right to select the firm best suited for the work without regard to total proposed budget submitted.



1485 Louis Bork Drive, Unit #113
Batavia, IL 60510
219-380-9770
www.glurbanforestry.com

November 13, 2025

City of Fort Atkinson
600 Talcott Ave.
Fort Atkinson, WI 53538

Attn: Tom Williamson, Superintendent of Operations
Re: Proposal for Public Tree Inventory and Urban Forestry Management Plan

Dear Tom,

Thank you for this opportunity to provide a proposal for an Urban Forestry Management Plan for the City of Fort Atkinson. This proposal includes an Urban Forestry Management Plan based on existing data on trees within maintained areas of Fort Atkinson City-owned right-of-ways and city properties and an option for a new inventory where data will be collected via handheld mobile devices, analyzed in a GIS environment, and used to prepare the Urban Forest Management Plan (UFMP).

Having performed dozens of inventories and management plans for municipal entities for many years we are aware of how much time, energy, and capital are invested in urban forest management. The most valuable tool for efficient and cost-effective urban forest management operations is an accurate and complete inventory of all trees on City parkways and green spaces. A tree inventory is the foundation for a comprehensive Urban Forest Management Plan, which will provide a strategic tree planting and maintenance plan. This plan will establish a cyclical tree pruning program, create a plan for future species composition and survival, establish pest monitoring protocols, and create community engagement so that residents have a sense of ownership in Fort Atkinson City's Urban Forest.

We look forward to working with you as part of your Urban Forestry Team to achieve your forestry, stormwater, and aesthetic objectives directly linked to a robust and healthy tree population.

Regards,

Jon Carlson

Jon Carlson
Tree Risk Management Consultant
ISA Certified Arborist Municipal Specialist
#IL 1135AM TRAQ Qualified



PROJECT UNDERSTANDING AND APPROACH

The City of Fort Atkinson is seeking to create a comprehensive Urban Forestry Management Plan for the City to evaluate and prioritize tree care operations, develop a planting and reforestation plan, and to plan and budget the management of the urban forest for the next ten years. Utilizing this management tool will create a diverse and resilient urban forest for the City of Fort Atkinson. Existing street tree inventory data will be provided by the City and there will be other City properties not included in any past inventory that will need to be analyzed.

Great Lakes Urban Forestry highly recommends that consideration be given to collecting new data on all trees in maintained areas to have accurate, up to date, information to create the plan. This new data will be the basis for a comprehensive UFMP that has goals, objectives and action items that will be useful for the 10 years of the plan. Data collected will include location, species, size, condition, risk management evaluation and maintenance recommendations. Analyzed data will create recommendations for prioritized tree pruning and removals, tree maintenance operations, risk mitigation activities, future planting plans and increasing species diversity. Implementing these recommendations will produce a diverse and resilient urban forest. The inventory is an efficient management tool; GIS data can be incorporated into existing Geographic Information Systems (GIS) using web applications, web maps, and operations dashboards.

Great Lakes has the depth of experience and a refined system for accomplishing these goals. Our approach is to collect GIS data using certified arborists and then analyze GIS data with our in-house team of GIS professionals and ISA Certified Urban Forest Professionals. Urban forestry management recommendations are made by this team to create a management plan that provides best management practices for you to implement in managing the City's trees. Our approach uses GIS software (ESRI's ArcGIS Platform), a thorough tree data analysis, and a commitment to long-term and continuing assistance and development when it comes to arboricultural and GIS needs. Please note that all work performed on this project will be done by ISA Certified Arborists and no subcontractors or interns will be used for tree data collection or GIS work.

CONSULTANT OVERVIEW

Great Lakes Urban Forestry has created dozens of municipal urban forest management plans and has extensive expertise in the fields of tree inventory, GIS technology and geospatial data management, urban forest management, plant pathology, and arboricultural consulting. Our extensive staff qualifications and experience in all aspects of arboriculture set us apart from other consulting firms who do not specialize in these varied areas. Our project staff have been cross trained in each of these areas so that the data we collect has real value and is viewed through the eyes of an experienced professional who is familiar with all aspects of municipal tree care and maintenance. We maintain continuing education as a high priority and stay on the cutting edge of arboriculture, having pioneered techniques for using GIS in reforestation planning, and incorporating TRAQ Risk Assessment concepts into our data collection when appropriate.

We do not use subcontractors or part-time interns on any large-scale tree surveys and management planning, ensuring high accuracy and professional results. We meet deadlines consistently, deliver work on time, and our commitment to continued support ensures that our clients are serviced at the highest level possible. We respond to emails and phone calls promptly (within 1 business day) and are committed to helping you maintain the best quality data possible. We also offer many additional services that other consultants do not.

EXAMPLES OF WORK

As requested, two examples of recent municipal urban forestry management plans (Cicero, IL, and Kewanee, IL) are provided in the email accompanying this proposal. Additional references will be provided upon request.

PROJECT TEAM

The following are short bios of the main staff tasked with interacting with the City. Other members of Great Lakes Urban Forestry's team are tasked with data collection and are experienced ISA Certified Arborists. Resumes and/or proof of credentials will be provided upon request.

PHIL GRAF – Certified Arborist #IL 1553-AM (Urban Forest Professional / TRAQ)

INDUSTRY EXPERIENCE: 32 Years

ROLE: Company Owner, Founder, and President

BACKGROUND: Phil is the founder and owner of Graf Tree Care/GLUF and has been in the tree care industry for over 30 years. He is an ISA Certified Arborist, Tree Risk Assessment Qualified, and an ISA Certified Municipal Specialist. He has worked for the City of Wheaton in the Forestry Division, where he gained valuable experience working in a municipal setting. He founded Graf Tree Care in 1999, specializing in tree trimming, removal, Urban Forestry consulting, tree inventory, plant health care, and planning. He has been instrumental in Emerald Ash Borer management, having worked with countless municipalities, park districts, businesses, and homeowners to survey their tree populations and provide custom tailored strategies to manage the Emerald Ash Borer. Phil's perspective as an arborist, municipal specialist, and business owner in both the public and private sectors in all facets of arboriculture make him an expert in the field.

LESLIE DELLES – Certified Arborist #IL-9199AM (Urban Forest Professional / TRAQ)

INDUSTRY EXPERIENCE: 12 Years with GLUF - 25 Years Total

ROLE: Operations Manager/GIS Technician/Management Planning Staff

BACKGROUND: Leslie is a full-time staff member, consulting arborist, GIS assistant, and project manager She has been in the environmental and tree care industry for over 20 years and is an ISA Certified Arborist and Municipal Specialist with a TRAQ Qualification. She holds a Bachelor's Degree in Earth Science from Northeastern Illinois University, and was previously employed for over 12 years by the US Department of Agriculture's APHIS (Animal and Plant Health Inspection Service), where her extensive experience dates back to surveying Asian Longhorned Beetle. She has also worked on APHIS's monitoring and control of Gypsy Moth and Emerald Ash Borer, among other insect pests. She works as a contract city forester in several communities and serves as our field team coordinator and project manager for inventory projects.

MATTHEW LE – Certified Arborist #IL-10091A (TRAQ)

INDUSTRY EXPERIENCE: 2 Years with GLUF – 5 Years Total

ROLE: Field Team Leader/Company Trainer/Urban Forestry Inventory Technician

BACKGROUND: Matthew began his career in the tree industry after high school when he joined the Arboriculture Lab at The Morton Arboretum. His exposure to scientific tree research led him to pursue further education in urban forestry at the University of Wisconsin-Stevens Point. At the University, Matthew served as president and treasurer of the UWSP-Student Society of Arboriculture and became an urban forestry research assistant. Over winter and summer breaks, he gained additional experience in plant health care, tree care, and research. Upon graduating from UWSP, Matthew joined the GLUF team full-time as a forestry survey technician. Matthew enjoys spending time structurally pruning young trees growing around his community.

JON CARLSON – Certified Arborist # IL-1135AM (Urban Forest Professional /TRAQ)

INDUSTRY EXPERIENCE: 6 Years with GLUF - 42 Years Total

ROLE: Tree Risk Consultant/ Management Planning Staff

BACKGROUND: Jon is our Tree Risk Manager, with over 40 years of professional experience in arboriculture and open space management. He has been an ISA Certified Arborist for over 27 years and has the ISA TRAQ qualification and Municipal Specialist certification. Jon received his Bachelor of Science in Biological Aspects of Conservation from the University of Wisconsin-Madison. In his career he has been the Dutch Elm Disease Technician for the City of Monona, Wisconsin, the Supervisor of Arboriculture at Fox Valley Park District, the Superintendent of Parks and Planning for Bartlett Park District, and the Special District Administrator for the City of Colorado Springs, Colorado. Jon's extensive municipal and park experience provides in-depth tree risk management consultation to municipalities, park districts, school districts and private property owners; he conducts tree inventories, prepares inventory and risk management reports for clients, and teaches Certified Arborist training classes.

SCOPE

INITIAL MEETING

Great Lakes Urban Forestry staff to meet with City Public Works staff to gather input on the expected final submission.

Deliverable: In-person meeting with City staff at a time and location determined by the City. Meeting notes compiled and electronically shared with City staff.

GENERAL CANOPY DATA COLLECTION

Certified arborists will conduct a “windshield survey” of selected right of ways for general tree canopy analysis and of City properties that have not been inventoried to create an estimated tree count and canopy condition analysis.

Deliverable: A summary of the general tree canopy condition and estimated population will be incorporated into the management plan.

NEW INVENTORY DATA COLLECTED ON ALL TREES IN MAINTAINED CITY AREAS (ALTERNATE #1)

This option is highly recommended for the management plan to contain specific recommendations for prioritized tree pruning and removals, tree maintenance operations, risk mitigation of higher risk trees, planting space availability and increasing species diversity. Data to be collected will include:

- GPS location (along with Illinois State-Plane XY coordinates and/or WGS 84 coordinates), street address and relative location, park or facility name.
- Species (common name, as well as genus and species), size (DBH in diameter inches)
- Condition rating, 1-5 (Specimen – Very Poor/dead)
- Maintenance Recommendation and identification of tree defects such as rot, deadwood, etc.
- Risk Level: None Observed, Elevated, Substantial, Critical
- Planting space recommendations will be GIS located
- Any relevant comments pertinent to the tree, additional data fields available upon request

Deliverables: Inventory report with a statistical analysis of the overall tree population, and all collected tree inventory data in a variety of formats.

URBAN FOREST MANAGEMENT PLAN

The Urban Forest Management Plan will provide goals, objectives, budgets and action items for the management of the City’s urban forest based on data collected and analyzed from the tree data. This plan will include:

- An analysis of the state of the City’s urban forest, including a description of the City’s canopy cover, species diversity, overall condition and maintenance needs.
- Short- and long-term urban forest goals for a ten-year period that will include canopy cover objectives, management needs, pruning and removal plans, risk mitigation, climate change mitigation, mitigation of pests and diseases, education and outreach to residents, and the identification of benchmarks to ensure the progress towards long-term goals.
- Recommended and prioritized urban forest management action items based on the goals and objectives, including prioritized pruning and removal schedules, prioritized planting locations and schedules, a cyclical pruning schedule and map, lists of preferred species, prohibited species, and species to be planted in limited quantities.
- Specifications from ANSI, ISA, and/or other nationally recognized standards for planting, pruning, removals, and protection.
- Required and recommended certifications, qualifications, and training for staff, contracted labor, and consultants.
- Material and budget projections and considerations for short- and long-term budgets and determining a plan for acquisition and replacement of equipment and resources.

Deliverables: An Urban Forest Management Plan provided as three hard copies and in a PDF format in a zip drive.

SCHEDULE

The following schedule is proposed for the major milestones of the project.

CITY OF FORT ATKINSON TREE INVENTORY AND URBAN FOREST MANAGEMENT PLAN PROJECT SCHEDULE	
PROJECT MILESTONE	COMPLETION DATE
Proposal Submission Deadline	November 13, 2025
Bid Award	November 21, 2025
Initial Meeting, GLUF/ Public Works	February 3, 2026
New Inventory Data Collection with Data Analysis Report (if opted for by the City)	March 2 -May 1, 2026
Project Completion, Urban Forest Management Plan Delivered, All Data and Reports Provided in Digital and Hard Copy Formats	June 19, 2026

STANDARD DELIVERABLES

- a. Tree Inventory Report: PDF and three hard copies (for Alternate #1)
- b. All tree data in ESRI geodatabase format (for Alternate #1)
- c. All Tabular data in Microsoft Excel format (for Alternate #1)
- d. Urban Forest Management Plan: PDF on zip drive, three hard copies

FEE SCHEDULE

BASE BID

ITEMIZED FEE SCHEDULE				
PROJECT TASK	TEAM MEMBER	HOURS	RATE/HOUR	TOTAL
Initial meeting*	Leslie Delles	4	\$125	\$500
Initial meeting*	Matthew Le	4	\$110	\$440
Meeting Total		8		\$940
General Canopy Data Collection*	Matthew Le	10	\$105	\$1,050
General Canopy Data Collection*	Anthony Abbate	10	\$105	\$1,050
Data Analysis	Leslie Delles	8	\$125	\$1,000
Data Collection Total				\$3,100
UFMP Data Analysis/Plan Creation	Leslie Delles	36	\$125	\$4,500
UFMP Data Analysis/Plan Creation	Jon Carlson	36	\$125	\$4,500
UFMP Total				\$9,000
PROJECT TOTAL				\$13,040
*All travel, meals and other incidentals are covered in the hourly rate.				

BID ALTERNATE #1: ADDITION OF NEW INVENTORY DATA FOR ALL MAINTAINED CITY TREES

ALTERNATE #1: ADD NEW INVENTORY				
PROJECT TASK	TEAM MEMBER	HOURS	RATE/HOUR	TOTAL
Inventory Collection Prep	Leslie Delles	12	\$125	\$1,500
Inventory Data Collection*	Matthew Le	64	\$105	\$6,720
Inventory Data Collection*	Anthony Abbate	64	\$105	\$6,720
Inventory Data Collection*	Martin Cullen	64	\$105	\$6,720
Inventory Report Data Analysis/Writing	Leslie Delles	16	\$125	\$2,000
Inventory Report Writing	Cherry Countryman	12	\$110	\$1,320
Inventory Total				\$24,980
Subtract General Canopy Data Collection	Not necessary if new			\$0
Subtract Data Analysis	Tree Inventory is done			\$0
ADD NEW INVENTORY TOTAL				\$24,980
*All travel, meals and other incidentals are covered in the hourly rate.				

PROJECT TOTALS

PROJECT	COST	ACCEPTED YES/NO
BASE BID: URBAN FORESTRY MANAGEMENT PLAN	\$13,040	
ALTERNATE #1: NEW INVENTORY	\$24,980	
PROJECT TOTAL W/NEW INVENTORY	\$38,020	

THE CITY OF Fort Atkinson has agreed to enter into contract with GREAT LAKES URBAN FORESTRY, INC. in the amount of \$---- to perform the work as described above. We will consider your signing and returning one (1) original of this Agreement as our authorization to proceed. This offer to provide services will remain valid for a period of 30 days from the date of preparation as indicated below, after which time if it has not been accepted it will be subject to change. Thank you again for the opportunity to submit our proposal.

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement as of the day and year below written.

CLIENT:

CONSULTANT:

CITY OF FORT ATKINSON

GREAT LAKES URBAN FORESTRY, INC.

BY: _____

BY: *Jon F Carlson*

TITLE: _____

TITLE: Tree Risk Management Consultant

DATE: _____

DATE: November 13, 2025

CITY OF KEWANEE URBAN FORESTRY MANAGEMENT PLAN



Prepared By:

Jon Carlson, Tree Risk Management Consultant
ISA Certified Municipal Arborist #IL 1135-AM TRAQ

Leslie Delles, Urban Forestry Consultant
ISA Certified Municipal Arborist # IL 9199-AM TRAQ



November 6, 2025



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SECTION 1: INTRODUCTION

Purpose of the Plan

The purpose of this Urban Forestry Management Plan is to outline goals, budgets, and arboricultural best management practices for the management of the urban forest for the City of Kewanee. Implementing this plan will increase canopy cover and maximize the benefits trees provide while minimizing costs. This plan creates a program to manage the urban forest for the greatest public good in a manner that is both financially and programmatically sustainable, while maintaining flexibility for future adaptive management.

Benefits of the Urban Forest

The trees in the City of Kewanee are an asset that should be preserved, protected and cared for as a part of the City's critical infrastructure. The preservation, protection and enhancement of the urban forest ensures that trees are properly planted and maintained within the City so that trees can enhance the quality of life for its residents. Municipal trees provide collective benefits that extend through the entire City of Kewanee and surrounding communities. Benefits from the urban forest include:

Energy Savings: When temperatures are warm, trees create cooler temperatures in the immediate environment by intercepting sunlight (creating shade) and from the transportational cooling of water being released from foliage into the atmosphere. These cooling outcomes reduce a community's urban heat island effect and cause air conditioners to work less, reducing the amount of energy used. When temperatures are cold, winter winds can cause homes to lose heat; trees can act as windbreaks, causing heating systems to use less natural gas and electricity.

Carbon Dioxide (CO₂): The amount of CO₂ which is put into the atmosphere each year has a direct correlation with global climate change. Trees uptake CO₂ and act as carbon sinks, removing it from the atmosphere, putting carbon into long-term storage in woody tissues, helping to mitigate the greenhouse gas effect.

Air Quality: Industrial processes and vehicle emissions put pollutants into our air. Trees absorb these compounds with their leaves and other tissues, removing them from the atmosphere. Reductions in pollutants result in overall better health, reducing the cost of healthcare to society, and improving quality of life for residents.

Stormwater: The cost of delivering fresh water to homes, as well as removing and treating wastewater and stormwater is considerable. Trees take water from the soil and put it back into the atmosphere through the process of transpiration. More trees mean less flooding, and less strain on stormwater infrastructure. Tree canopies slow rainfall's effects on flooding by intercepting it with leaves and branches, delaying how quickly rainfall can become floodwater.

Aesthetic/Economic: Up to 15% of the value of a property can be attributed to its trees and other landscaping. Tree lined streets are much more appealing to homeowners, customers, and businesses, resulting in increased property values, improving commercial district buyer traffic and increased revenues.

Quality of Life: Areas with trees have lower crime rates, have higher levels of community interaction, improve mental and physical health and healing for residents, provide important habitat for birds and other wildlife, and generally protect and enhance the quality of life for residents.

The implementation of an effective urban forestry management plan leads to a tree population that maximizes benefits by increasing the number of trees in the population, improving tree health and increasing how long they live, all while minimizing costs, resulting in a healthy, well-maintained, vibrant tree population.



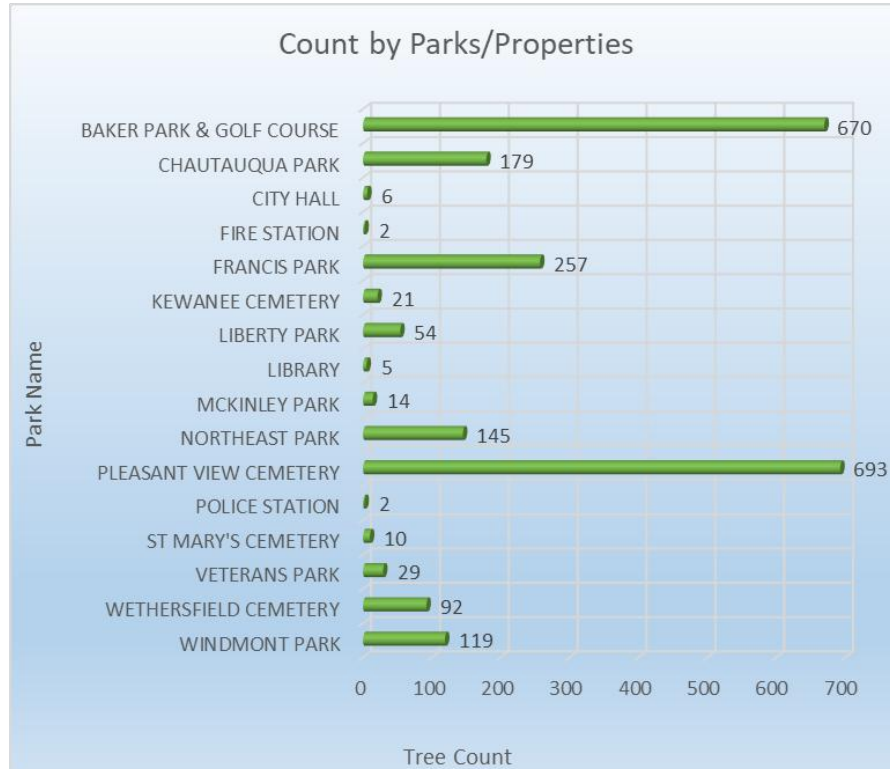
SECTION 2: THE CURRENT CONDITION OF THE URBAN FOREST

Current Condition of the City’s Urban Forest

In July and September of 2025, Certified Arborists from Great Lakes Urban Forestry (GLUF) collected data for a comprehensive tree inventory of publicly managed street trees and trees in City owned parks, cemeteries and properties within the municipal boundaries of the City of Kewanee, IL. The City’s tree inventory project is the basis for this Urban Forestry Management Plan, detailing how this tree population will be managed to maximize the benefits for the City of Kewanee, its residents and its patrons, with a focus that begins in 2025 and projects out to 2035. The inventory resulted in a total count of 3,972 trees and 1,332 planting spaces; however, the population’s diversity is overpopulated with Maples, which make up 38% of the total number of trees. The charts and statistics in this portion of the Management Plan illustrate that the tree population in the City is in below average condition and has a generally even spread of trees through all age classes. This plan will equip the City of Kewanee to address short-term concerns, long-term management considerations, and overall planning objectives.

The following executive summary gives an overview of the findings of the 2025 inventory and an analysis of those findings.

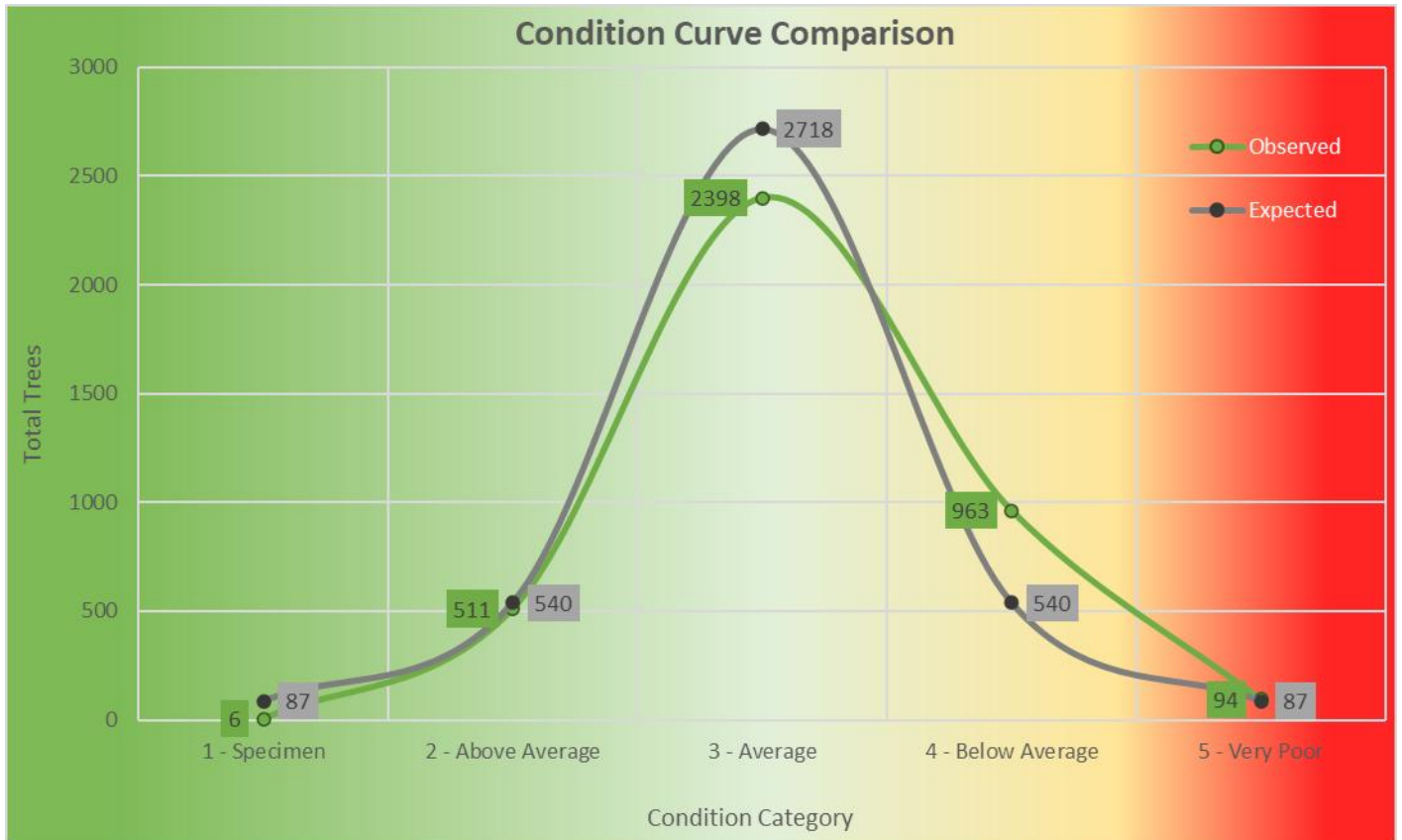
Statistics – Managed Trees



CITY OF KEWANEE TREE INVENTORY STATISTICS	
Total Number of Trees Inventoried	3,972
Number of Planting Spaces Recorded	1,332
Number of Stumps Recorded	179
Total Number of Species	120
Total Diameter Inches	81,695"
Average Tree Diameter	20.57"
Average Tree Condition	3.16 (Below Average)

Condition Curve

Condition 1	Specimen – Tree has no observable defects, wounds, diseases, and has textbook perfect form for the species. In addition, since young trees tend to be trouble free and homogenous, a Condition 1 tree must by definition be a minimum of 16" DBH. These are legacy trees, and as such are rare.
Condition 2	Above Average – Tree may have a small amount of deadwood, or a very limited number of minor defects. The overall form of the tree must be good, and consistent for the species in question. These trees should also be a minimum of 8" DBH. Often the difference between Condition 2 and 3 is form or growth habit.
Condition 3	Average – Tree has moderate but acceptable amounts of deadwood, wounds, or other defects, but is generally healthy. A wide variety of forms is acceptable for this group, which is meant to define the middle ground around which better or worse trees can be defined and identified.
Condition 4	Below Average – Tree has defects, deadwood, wounds, disease, etc. that have the potential to cause a need for removal. Very poor form or architecture can put an otherwise healthy tree in this category as well, due to the potential for tree or root failure.
Condition 5	Very Poor/ Dead – Tree must be removed. Physical or health defects are too far gone for the tree to be reasonably saved. Like Condition 1 trees, these are relatively rare, as generally trees that are getting to this level are removed before reach this stage.



The green line with green labels represents what was observed in the field and shows the distribution of trees in each of the categories enumerated above. Deviations from the expected normal standard distribution can be used to analyze the overall health of a tree population, and for this reason, a theoretical gray curve representing an expected distribution is created so that comparisons can readily be made. The condition curve for this inventory indicates a tree population that is in overall below average condition.

The Condition 1, or specimen, trees were lower than would be predicted by the standard distribution alone, but we always expect that the specimen trees will come in lower than their statistical norm because of their rarity in municipal growing conditions. A Condition 1 tree, by definition, must be at least 16" DBH (and generally much larger), have textbook perfect architecture for the species, and have no observable defects. Over 60% of the City Kewanee's trees meet the DBH threshold to qualify for this condition, however their structure, vigor, and/or defects prevent them from receiving this condition rating. As younger trees are planted in proper sites with adequate space and are properly pruned and maintained, they should develop with good structure and may mature to become Condition 2 and eventually Condition 1 trees.

The Condition 5, or very poor, trees are slightly higher than the expected norm, a sign of the need for removal of dead and declining trees. It is recommended that Condition 5 trees be prioritized and removed in a timely manner.

The Condition 2, or above average, trees are slightly below what statistical analysis would predict. Like the Condition 1 category, Condition 2 trees need to have good structure that is

consistent with the species in question and also be a minimum of 8" DBH. Over 80% of the inventoried trees measure 8" DBH or larger and qualify for the Condition 2 rating, but just 16% of those trees were rated as Condition 2 or better due to the trees' structure and vigor. Looking toward the future, Kewanee has an opportunity to increase the number of trees in the Condition 2 category. In general, if trees are properly planted, mulched, watered, and established, and site selection for the trees is well matched to the species, followed with cyclical pruning and maintenance, trees will often mature with good form and without significant defects. These trees can eventually become Condition 2 trees.

The Condition 4, or below average, trees are significantly higher than what would be statistically expected. Focusing on reducing the number of declining trees will not only help improve the overall condition of the population but will also help improve overall diversity as underrepresented species are planted in their place. Species diversity is further discussed below. Kewanee can use the data from this inventory to locate Condition 4 trees and prioritize them for maintenance or removal.

The trees in the Condition 3, or average, category are much lower than what the statistical analysis would predict which is simply because of the higher numbers in the Condition 4 category. In the next few years, as the below average trees receive pruning maintenance or are removed, we would expect this condition curve to shift more toward the average and above average categories.

Age-Class Diversity

Age-class diversity is an important quality of a healthy, vibrant urban forest. Young, intermediate and mature trees allow for regeneration, replacement and vigor in the overall forest community. A mixture of tree species, locations, and ages will lead to greater diversity, insulating a tree population against pest and pathogen outbreaks. Urban forest plantings can often create even-aged tree stands, so that all trees are approximately the same size and age. However, once these trees begin to decline, many will require removal and replanting simultaneously. This can leave areas without shade and aesthetics for long time periods.

A sustainable strategy is to plant trees over a longer timeframe. With this strategy, trees will grow to maturity in different stages and decline at different times. When declining trees are removed, there will still be a variety of age classes and tree sizes. This also reduces the pressure to plant trees in an area immediately after tree removal, helping to manage costs. Mixed age-class plantings ensure that mature trees are always present in a population and new plantings can be strategically planned.

An additional benefit of mixed-age plantings is the ability to plant shade-loving trees as well as sun-loving trees. When an area is newly planted with trees of the same age, all the trees are

essentially in full sun. This reduces the ability to plant shade-loving trees. With mixed-age stands, shade-tolerant trees may be planted underneath the canopy of larger, mature trees.



This age class analysis chart illustrates a somewhat atypical trend in the overall age spread of a tree population seen in a municipal setting. We often see many trees being younger to middle aged and a relatively lower number of trees in the mature age categories. However, in Kewanee we see relatively consistent numbers in the age class categories through the 30" DBH mark. As shown above, 15% of the total population has a DBH of 6" or less, which is an indication of a commitment to tree planting in recent years. It is assumed that most trees grow on average approximately $\frac{1}{2}$ " per year, although that figure varies significantly depending on the species in question, so we consider these trees (1-6" DBH) to be less than approximately 15 years old. About 14% of Kewanee's trees have a DBH of 7-12" which are estimated to be 15-25 years old. The 13-18" DBH category make up approximately 17% of the population and are approximately 25-35 years old. The 19-24" DBH category which are generally mature trees over 35-45 years old represent another 17% of the total tree population.

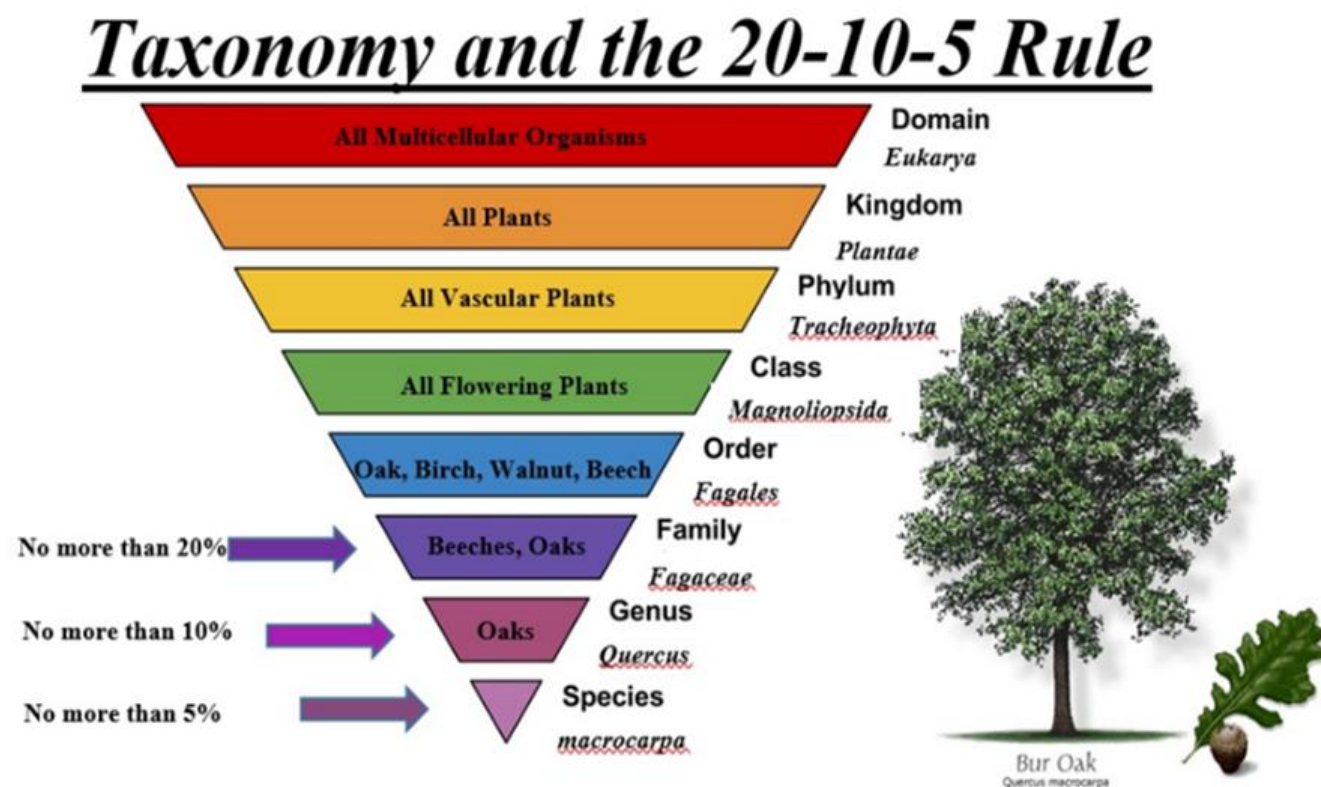
Trees measuring over 24" DBH make up approximately 37% of the total tree population. The 869 trees in the 25"+ DBH categories are about 45-50+ years old. It is typical for the number of trees in the 30"+ categories to be lower due to the natural senescence and ensuing decline of trees in municipal settings. An equal number of trees in each age classification is, within reason, desirable and indicative of a consistent focus on tree planting and tree maintenance and shows that the right trees are being planted in the correct locations. A positive aspect of this chart is the even aged size categories and the commitment that is shown to new plantings within the last

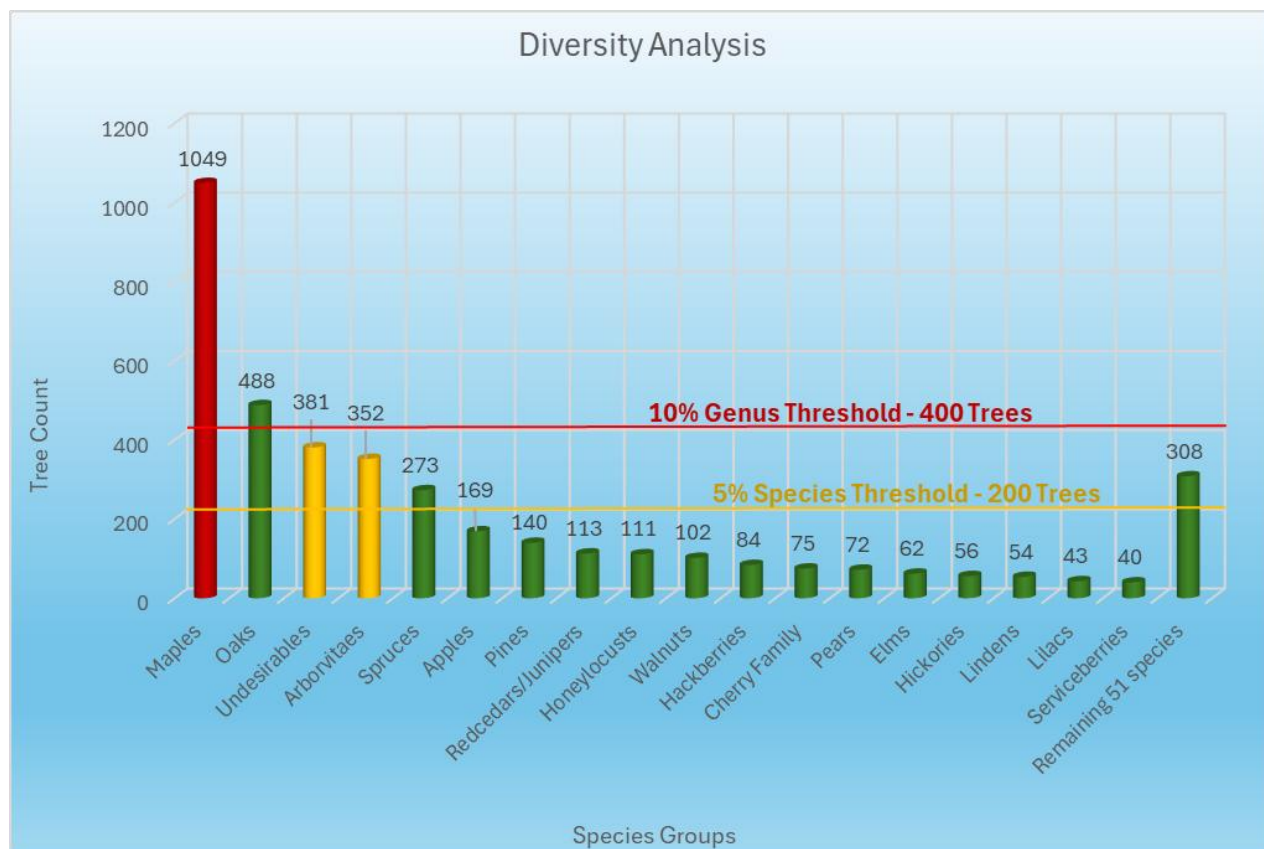
25 years, as evidenced by the number of trees in the 1-12” ranges. Continued proper tree selection, planting and regular maintenance will help ensure a stable urban forest population.

Taxonomic (Species) Diversity

Taxonomy is the method by which scientists classify plants, animals, and other life forms into distinct categories. A species is unique. There is only one type in that category, such as Burr Oak (*Quercus macrocarpa*), which refers to only one specific type of tree. A genus, however, is a group that may contain multiple species. All Oak trees, for instance, are in the genus *Quercus*. The further down the taxonomic ladder you go, the more similar things become.

The “20-10-5” rule has been adopted as a Best Management Practice in Urban Forestry. This rule simply states that a tree population should ideally have no more than 20% of any single family, no more than 10% of any single genus, and no more than 5% of any single species. Lessons from the Emerald Ash Borer and Dutch Elm Disease blights have taught that, when a pest or pathogen that attacks specific tree genera is introduced into a region where those genera are overrepresented, tree populations can take a devastating hit. Included are 10% genus threshold and 5% species threshold lines on the following diversity analysis graph, illustrating the desired composition of the inventoried tree population.





The tree population of the City of Kewanee has quite good overall diversity with 120 different species present. However, as shown above, the 1,049 trees in the Maple genus account for 38% of the tree population. Although it is quite common for Maples to be the highest represented genus in urban settings because they are an adaptable and hardy shade tree, the issue is that if a pest or pathogen that attacks the Maple genus were introduced into the region (as was seen with EAB in some areas), Kewanee could lose nearly 40% of its street tree population. Going forward and with the help of the Urban Forestry Management Plan, Kewanee will need to focus on reducing the number of poor condition and over-mature Maple trees.

The 381 trees in the undesirable category are species such as Ailanthus, Mulberry, Boxelder, Cottonwood, Willow, Black Cherry, Siberian Elm, Poplar, and Black Locust. These trees are notorious for being fast growing and weak-wooded trees that develop a variety of structural defects as they mature. For safety, aesthetic, and ecological reasons, it is recommended that the City work toward the goal of gradually reducing the number of undesirable trees in its population and replanting them with a diverse set of tree species, further increasing the overall diversity and tree population stability.

Kewanee can use the tables and graphs that have been provided as a reference when choosing species to plant in the future. This Urban Forestry Management Plan provides an analysis of the current population and a guide for which tree species might be planted going forward. Proper planning will help Kewanee protect the investment in each new tree and create a future tree population that is more resilient and diverse than the current one.

Going forward, Kewanee should plan to take a targeted approach when it comes to choosing new species to plant in its parkways/terraces and properties and focus on planting a wide variety of tree species and genera. The table below is an itemized list of all tree species present in the City’s tree population, along with average DBH, and average condition for each species. The average condition ratings can be used as a guide as to what species are growing well.

SPECIES	COUNT	% OF TOTAL	AVG DBH	AVG COND
ARBOR VITAE	352	8.86%	23.87	3.29
MAPLE-NORWAY	276	6.95%	23.05	3.38
MAPLE-SILVER	254	6.39%	31.46	3.10
OAK-BURR	226	5.69%	29.35	3.23
MAPLE-RED	169	4.25%	15.93	3.06
MAPLE-SUGAR	164	4.13%	23.46	3.18
APPLE-CRAB SPP	142	3.58%	11.97	3.10
SPRUCE-NORWAY	138	3.47%	20.12	2.51
MULBERRY-SPP	123	3.10%	13.50	3.68
CHERRY-BLACK	119	3.00%	19.57	3.45
HONEYLOCUST	111	2.79%	29.26	3.38
MAPLE-BLACK	109	2.74%	25.85	3.21
PINE-WHITE	109	2.74%	14.21	2.94
WALNUT-BLACK	102	2.57%	21.46	3.02
SPRUCE-COLORADO	91	2.29%	13.30	2.85
EASTERN REDCEDAR	90	2.27%	19.50	3.28
HACKBERRY-COMMON	84	2.11%	18.60	3.14
OAK-PIN	84	2.11%	29.51	2.80
OAK-SWAMP WHITE	69	1.74%	11.55	2.91
PEAR-CALLERY	69	1.74%	13.99	3.32
ELM-SIBERIAN	61	1.54%	28.02	3.72
HICKORY-SHAGBARK	50	1.26%	20.00	2.52
MAPLE-FREEMAN	43	1.08%	12.02	3.00
LINDEN-AMERICAN	41	1.03%	29.88	3.32
SERVICEBERRY-SPP	40	1.01%	14.45	3.18
OAK-NORTHERN RED	39	0.98%	18.92	2.85
LILAC-JAPANESE TREE	37	0.93%	12.46	3.11
OAK-WHITE	36	0.91%	27.28	3.25
ELM-RED	33	0.83%	16.88	3.27
REDBUD-EASTERN	33	0.83%	9.27	3.18
CHERRY-SPP	30	0.76%	8.47	3.10
SPRUCE-WHITE	28	0.70%	13.75	2.89
APPLE-EDIBLE	27	0.68%	8.85	3.04
BUCKTHORN	26	0.65%	9.42	3.58
JUNIPER-COMMON	23	0.58%	16.61	3.00
MAPLE-AMUR	22	0.55%	19.82	3.09

CITY OF KEWANEE URBAN FORESTRY MANAGEMENT PLAN

PEACH	22	0.55%	3.86	3.14
COTTONWOOD-EASTERN	19	0.48%	35.16	3.11
CATALPA-NORTHERN	17	0.43%	42.88	2.53
OAK-BLACK	17	0.43%	24.12	2.94
TULIPTREE	16	0.40%	22.69	2.63
DOUGLAS FIR	15	0.38%	16.20	2.73
ELM-AMERICAN	15	0.38%	18.87	3.07
SPRUCE-SPP	15	0.38%	3.87	3.00
PLUM-SPP	14	0.35%	4.93	3.07
SYCAMORE	14	0.35%	36.79	2.79
KENTUCKY COFFEETREE	13	0.33%	13.15	3.08
ASH-WHITE	12	0.30%	16.67	4.00
DOGWOOD-SPP	12	0.30%	9.92	3.33
LINDEN-LITTLELEAF	12	0.30%	19.50	3.00
SMOKETREE	12	0.30%	8.42	3.00
BALDCYPRESS	11	0.28%	5.91	3.09
BUCKEYE-OHIO	11	0.28%	23.36	3.27
ELM-HYBRID	11	0.28%	13.55	2.45
AILANTHUS	10	0.25%	14.10	3.70
BLACK LOCUST	10	0.25%	22.30	3.40
PINE-LIMBER	10	0.25%	4.10	3.00
ASH-GREEN	9	0.23%	17.22	4.44
CHERRY-PURPLE LEAF	9	0.23%	5.00	4.00
GINKGO	9	0.23%	15.56	3.56
MAPLE-JAPANESE	9	0.23%	2.89	3.00
OSAGE ORANGE	9	0.23%	35.33	3.44
PINE-AUSTRIAN	9	0.23%	20.44	3.00
PINE-RED	9	0.23%	17.22	2.56
HEMLOCK-EASTERN	8	0.20%	27.63	2.75
YEW	8	0.20%	11.50	3.13
AMUR CORKTREE	7	0.18%	23.00	3.14
ASPEN-QUAKING	7	0.18%	4.29	3.00
BIRCH-RIVER	7	0.18%	21.71	2.86
DOGWOOD-CORNELIAN	7	0.18%	9.57	3.00
HAWTHORN-SPP	7	0.18%	15.57	3.43
OAK-SHINGLE	7	0.18%	23.14	2.14
FIR-CONCOLOR	6	0.15%	21.33	2.83
LILAC-SPP	6	0.15%	15.67	3.50
POPLAR-SPP	6	0.15%	15.33	2.83
HICKORY-SPP	5	0.13%	22.40	2.80
MAGNOLIA-SAUCER	5	0.13%	26.00	3.40
SWEETGUM	5	0.13%	28.20	3.20
OAK-ENGLISH	4	0.10%	4.00	3.00

CITY OF KEWANEE URBAN FORESTRY MANAGEMENT PLAN

ROSE OF SHARON	4	0.10%	3.00	3.00
BIRCH-GRAY	3	0.08%	17.00	3.00
ELM-SPP	3	0.08%	9.00	4.00
HAZELNUT-TURKISH	3	0.08%	9.33	3.33
LARCH-EASTERN (TAMARACK)	3	0.08%	28.00	3.00
MAPLE-MIYABEI	3	0.08%	11.00	2.67
OAK-BEBB	3	0.08%	18.67	2.33
PEAR-EDIBLE	3	0.08%	7.00	3.00
PINE-SCOTCH	3	0.08%	19.00	3.33
WITCH HAZEL-COMMON	3	0.08%	2.33	3.00
YELLOWWOOD	3	0.08%	2.33	3.00
ASH-BLUE	2	0.05%	23.00	4.00
BLACKGUM	2	0.05%	1.00	4.50
BOXELDER	2	0.05%	6.50	4.00
DOGWOOD-KOUSA	2	0.05%	1.50	4.50
HAWTHORN-COCKSPUR	2	0.05%	6.50	3.00
HYDRANGEA-TREE	2	0.05%	4.50	3.00
MAGNOLIA-CUCUMBER	2	0.05%	5.50	3.00
MAGNOLIA-SPP	2	0.05%	10.00	3.50
OAK-SPP	2	0.05%	17.00	3.00
POPLAR-WHITE	2	0.05%	39.00	4.00
WILLOW-PUSSY	2	0.05%	26.50	3.00
WILLOW-WEeping	2	0.05%	14.00	3.50
DAWN REDWOOD	1	0.03%	1.00	5.00
DOGWOOD-FLOWERING	1	0.03%	7.00	3.00
EUONYMUS-SPP	1	0.03%	12.00	3.00
FIR-SPP	1	0.03%	3.00	3.00
HAWTHORN-WASHINGTON	1	0.03%	11.00	3.00
HICKORY-BITTERNUT	1	0.03%	26.00	3.00
HORNBEAM-AMERICAN	1	0.03%	17.00	4.00
HORNBEAM-EUROPEAN	1	0.03%	14.00	3.00
HORSECHESTNUT	1	0.03%	2.00	3.00
KATSURA	1	0.03%	3.00	3.00
LINDEN-SILVER	1	0.03%	6.00	3.00
MOUNTAIN ASH-AMERICAN	1	0.03%	16.00	3.00
OAK-SCARLET	1	0.03%	15.00	2.00
PRINCESS TREE	1	0.03%	2.00	4.00
SPRUCE-SERBIAN	1	0.03%	13.00	3.00
UNKNOWN	1	0.03%	9.00	3.00
VIBURNUM-SPP	1	0.03%	9.00	3.00
WILLOW-SPP	1	0.03%	2.00	3.00

Arborist Recommendations



In terms of Arborist Recommendations of maintenance needs in the Kewanee tree population, the statistics displayed above show an encouraging trend overall. A large portion of the population (72%) only require cyclical pruning on a regular basis, a desirable trait in a tree population. A cyclical pruning program will ensure that each City tree in Kewanee will be pruned on a regular basis. Proper pruning will help to improve the overall condition of the tree population. However, 502 trees are recommended for removal. The 131 trees in the Priority Removal category should be prioritized over other removals. The 309 trees designated as Standard Removals should be prioritized and removed in a timely manner. The 62 trees in the Low Priority category should be removed as time and budget allow. The remaining categories, other than removals discussed above, were used to indicate trees in need of maintenance which should be prioritized over those in the Cyclical Prune category and will be discussed briefly below.

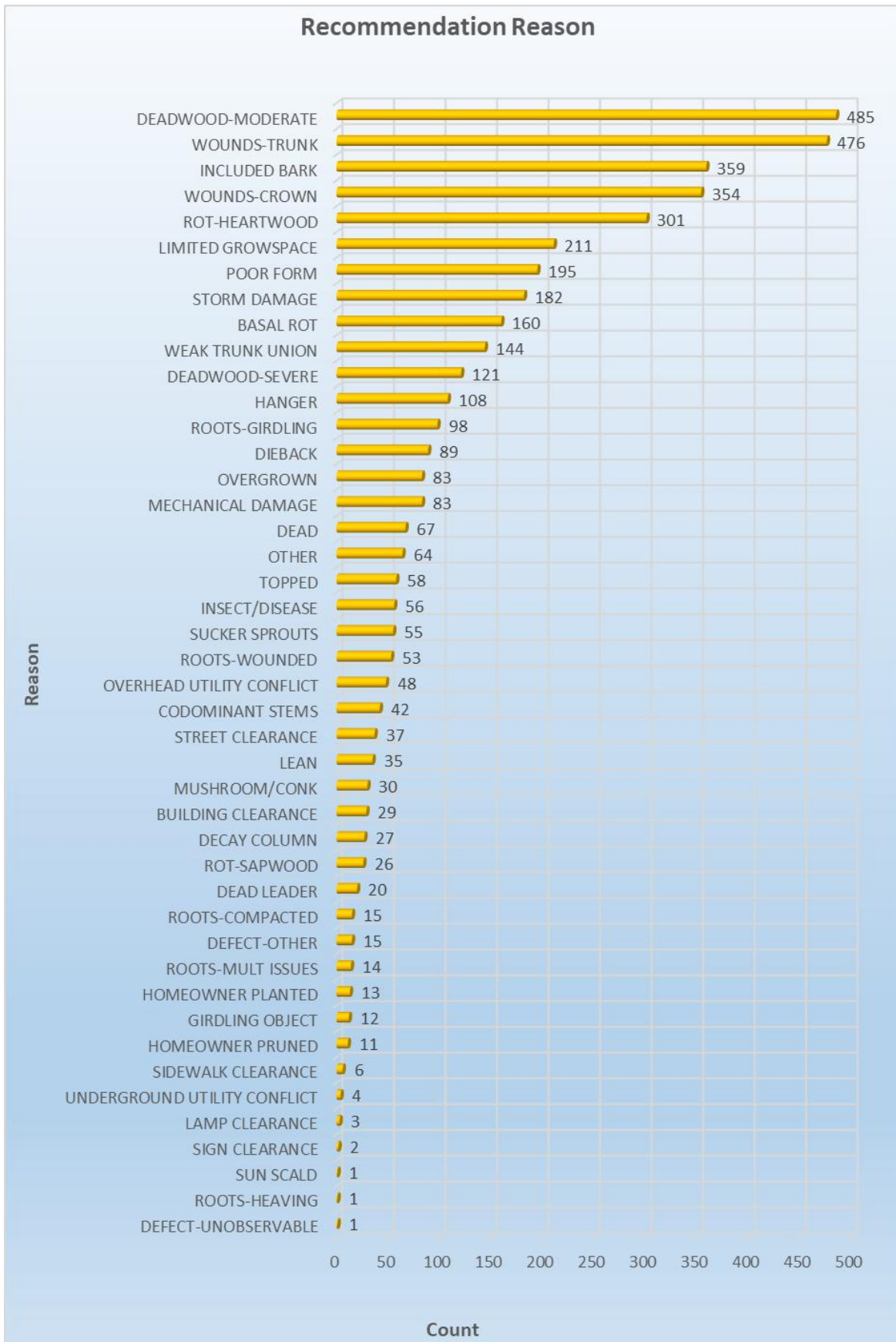
The 275 trees in the Prune-Priority group are trees which are simply overgrown, or have parts which need to be removed promptly, and should have pruning prioritized over the trees in the cyclical prune set. Generally, we consider this to be a “within 1-3 years” level of pruning.

The 283 trees in the two Monitor categories can be viewed as being in a transitional phase. For the most part, the tree has an indiscernible defect or shows signs of developing issues or general decline which must be observed. These trees should be reassessed periodically, and their maintenance status updated.

The 49 trees categorized as Prune-Train are generally trees smaller than 8" DBH that have structural issues or are overgrown and require selective pruning to establish better architecture in the future. Establishment pruning, or the pruning of young trees to establish proper branching habit and structure, is one of the least expensive yet most effective maintenance items that can be performed on a young tree.

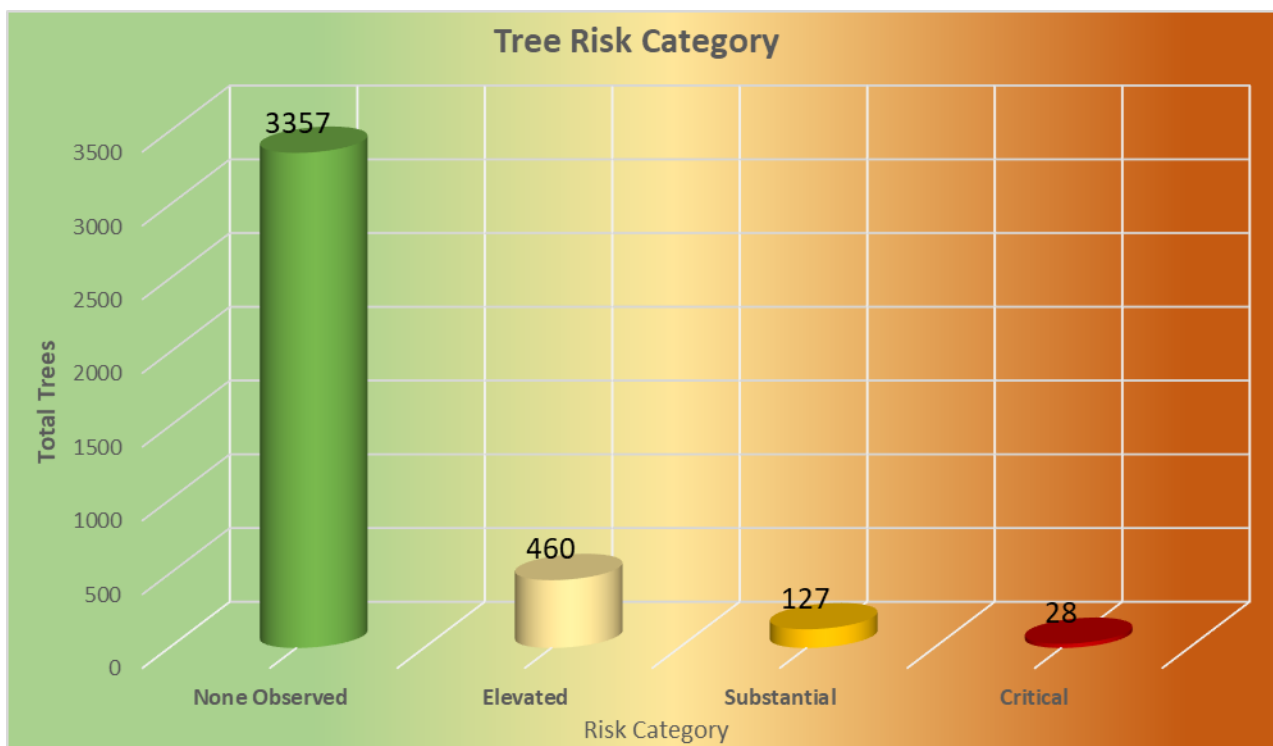
The six trees in the Maintenance-Other category typically need some other form of maintenance not covered in the rest of the categories. A description of the maintenance needed should be found in the reasons or comments field.

The arborist recommendation reasons on the following chart summarize the field observations into the main factors that justify the arborist recommendation, the condition, and the risk rating of each tree. Some trees may have more than two factors, but the two most prominent issues that directly pertained to the maintenance recommendation or condition were noted. Kewanee can use this inventory data to query specific defects and prioritize mitigation actions. This chart illustrates an interesting overview of the health, defects, and maintenance needs of the City of Kewanee's tree population.



Risk Level Summary

These were rapid assessments, and not full risk assessments, and as such, are meant to indicate a need for further study, and do not represent a legal description of these trees' risk levels. These assessments are not legally binding and are not intended to be utilized as evidence in a court of law. They serve primarily for internal record keeping, and a means of locating trees which require more detailed study before making a final decision as to management strategy. Since the risk level field is part of the data collection parameters for the City of Kewanee inventory, it is recommended that Kewanee develop and implement a tree risk assessment policy so that consistency and accountability are successfully achieved.



As illustrated in the chart above, the majority of Kewanee trees were found to have no observable risk level. However, 515 trees were found to have some degree of risk. There were 28 trees that fell into the Critical Risk category, these should be examined by Kewanee staff and receive immediate mitigation actions if they have not already (see list in Appendix M). Trees that fall into the Substantial risk level category should receive a Level 2 Risk Assessment and/or mitigating action. Any tree found to pose an Elevated risk level should be monitored and/or inspected by Kewanee and a threshold of risk tolerance be established. Some Elevated risk level trees may also be considered for a Level 2 Risk Assessment and/or mitigating action. Great Lakes can conduct Level 2 Basic Risk Assessments and can assist the City in any aspect of developing a Tree Risk Assessment Policy or can conduct any needed Level 3 Advanced Risk Assessments.

Section 3: GOALS, OBJECTIVES, STRATEGIES

Goals, objectives and strategies are at the heart of this urban forest management plan and are crucial for effective strategic planning. Data collected from a comprehensive inventory has been analyzed; strengths and areas needing improvement in the management of the urban forest have been identified. These identified areas have been formalized into the following goals, objectives and strategies, giving a blueprint for the City to follow for the next ten years and beyond. Although these goals, objectives and strategies are very specific, these are not written in stone and should be revisited periodically to determine effectiveness and to revise and course correct as needed.

This blueprint has been organized in the following manner:

- Goals are broad primary outcomes that are clear, concise statements of direction.
- Objectives are measurable steps presented that will lead to achieving the goals.
- Strategies are clear, defined actions and approaches that are designed for the successful execution of objectives.

Timeframes are essential for plan effectiveness. Short-term objective timeframes are one to three years. Long-term objectives are three to ten or more years. The action plan following the goals section defines specific steps and provides suggested timelines and budgets needed for implementation.

Goal #1: Increase Urban Tree Canopy Through Proper Tree Care

Increase total canopy cover provided by the public tree population through improving tree health, size and vigor.

- Short-term Objective: Implement consultant's recommended priority and standard tree removals and priority pruning.
 - Strategy: Conduct recommended priority removals by the end of the second year of the management plan implementation.
 - Strategy: Conduct recommended standard removals beginning in the third year of the management plan implementation.
 - Strategy: Conduct recommended low-priority removals in the sixth year of the management plan implementation.
 - Strategy: Conduct priority pruning on all City of Kewanee managed trees, complete by the end of year two of the plan.
- Long-term Objective: Create a cycle pruning program.
 - Strategy: By year five, after the recommended priority tree removal and priority pruning is complete, begin a cyclical pruning program. This program will ensure that all trees on City property are pruned every six years, increasing tree health and vigor while reducing costs associated with storm damage and tree failure.

- Long-term Objective: Reduce the number of low-quality undesirable trees in the inventory.
 - Strategy: Low-quality undesirable trees identified in the inventory will be removed as they decline and/or pose higher levels of risk, where appropriate.
- Long-term Objective: Maintain an accurate, up to date tree inventory.
 - Strategy: Use ESRI software to maintain the inventory data on a GIS platform and keep planting and removal data up to date using computers and/or tablets.
 - Strategy: The inventory should be updated periodically (ideally every five years) by a forestry consultant to keep the information current on a City-wide scale.

Goal #2: Increase Urban Tree Canopy Through Planting

Increase the stocking density on City of Kewanee property from the current level of 75% to 85%.

- Short-term Objective: Implement proper planting and establishment practices for all new trees through proper selection, planting, and post planting care, allowing trees to become well-established, creating more canopy cover.
 - Strategy: Determine the right tree in the right place for all planting plans.
 - Strategy: Utilize detailed plant material and planting specifications for contractors to follow, coupled with inspections for adherence to specifications by City representatives before, during, and after planting.
 - Strategy: Acquire equipment and hire part-time staff for regular summer tree watering for the first two years after planting.
 - Strategy: Train in-house staff to conduct establishment pruning on all new plantings in the third year after planting. Begin pruning.
- Long-term Objective: Increase managed tree count to 4,500 trees (85% of capacity).
 - Strategy: After the 502 recommended removals are complete, the tree population count will be 3,470 trees. Kewanee plants -- trees each year; increase that number to 100 trees per year to build up the number and types of trees during the 10-year timeframe of this plan and bring the inventory up to 4,500 trees.

Goal #3: Implement Best Management Practices in Tree Care Operations

- Short-term Objective: Follow all referenced tree care related ANSI standards and ISA Best Management Practices.
 - Strategy: Standards will be made available to all staff and contractors that are performing tree care operations.
 - Strategy: Conduct regular annual training on tree care operation BMPs for all in-house tree care staff. This training will also be given to new employees assigned to the forestry department. These may be in-house or seminars.
 - Strategy: Require and monitor adherence to tree protection standards by all contractors and staff for all construction projects.

Goal #4: Increase Species Diversity

Increase species diversity to protect the urban forest from catastrophic losses due to invasive insect and disease pests and changes to climate.

- Long-term Objective: Decrease the Maple species percentage in the population from 38% to 30%.
 - Strategy: Create a list of underutilized and unused species to draw from for planting planning.
 - Strategy: Eliminate the planting of Maples for the first three years of the plan.
 - Strategy: After year three, incorporate a limited number of Maples in planting plans, not to exceed 2% of the total planted per year. Revisit this after year 10 by analyzing current inventory data.
 - Strategy: Review the acceptable and unacceptable species planting list periodically to ensure that it is maintained in accordance with the latest information on successful species, climate change, and insect and disease management.

Goal #5: Decrease Potential Risk from Tree and Tree Part Failure

- Short-term Objective: Mitigate or conduct higher levels of risk assessment on trees with potential risk identified in the 2025 inventory.
 - Strategy: Kewanee staff inspect and mitigate trees identified with critical risk issues as soon as possible.
 - Strategy: Kewanee staff inspect trees with substantial risk issues and mitigate or conduct higher level risk assessments by the end of Year 2.
 - Strategy: Kewanee staff inspect trees with elevated risk issues and mitigate or conduct higher level risk assessments by the end of Year 4.
 - Strategy: Kewanee staff schedule any trees recommended for Level 2 or Level 3 Risk Assessments to determine level of risk and risk mitigation actions..
- Long-term Objective: Create, adopt and implement a tree risk policy and procedures.
 - Strategy: Create and adopt a tree risk policy that states the intent of the City of Kewanee to make reasonable efforts to identify potential elevated risk and high-risk trees that are in their care.
 - Strategy: Create, adopt and implement procedures that identify potential tree risk and allow staff to make reasonable risk mitigation decisions based on the risk levels found, level of acceptable risk, budget constraints, and other factors that affect work priorities.

Goal #6: Create and Follow Equipment and Personnel Budget Plan

- Long-term Objective: Create forestry capital equipment procurement and replacement plan.
 - Strategy: Inventory capital forestry equipment and create 10-year replacement and procurement plan for capital expenditures.
- Long-term Objective: Investigate and budget for forestry personnel.
 - Strategy: Track in-house and contracted hours spent on implementing the forestry management plan for plan years 1-4. Create a 10-year plan for additional personnel needed to implement the management plan for the urban forest.

Goal #7: Increase Public Awareness

- Long-term Objective: Increase public awareness of trees and their benefits to the community and to the environment, and for benefits to residents' mental and emotional health.
 - Strategy: Public Meetings. Hold public meetings to educate residents on the Village's management of the urban forest; on the benefits trees provide the community, on the care of trees, and on how residents have a role in supporting the urban forest across the community.
 - Strategy: Conduct an Arbor Day activity. Coordinate with the Hazel Crest Park District and a local school to annually plant trees with students at park or school sites on the last Friday in April.

SECTION 4: ACTION ITEMS, SCHEDULES AND BUDGETS

ACTION ITEMS AND SCHEDULE

ACTION ITEM	DESCRIPTION	COMPLETION TIMELINE	LONG-TERM GOAL BENCHMARKS
Year 1- FY 2025/26			
Goal #5 Objective: Mitigate identified risk. Strategy: Mitigate all Critical Risk	Identify and remove all identified Critical Risk. 24 removals and 4 Priority Pruning	10/1/2025	
Goal #1 Objective: Tree removals and priority pruning, Strategy: Conduct Priority Removals. Goal #5 Objective: Mitigate identified risk. Strategy: Mitigate Substantial Risk	Create RFP for 41 Priority Removals, Substantial risk, remove trees.	4/30/2026	
Goal #1 Objective: Tree removals and priority pruning, Strategy: Conduct 1/2 Priority Pruning. Goal #5 Objective: Mitigate identified risk. Strategy: Mitigate Substantial and Elevated Risk	Create RFP for 126 trees over 12" dbh for Priority Pruning.	3/15/2026	
Goal #2 Objective: Planting and establishment practices. Strategy: Right tree/right place in plans	Create parameters for defining the right tree/right place for plans	3/1/2026	
Goal #2 Objective: Planting and establishment. Strategy: Specifications and inspections	Work with consultant and UFMP to formalize planting specifications for all contractors and staff	3/1/2026	
Goal #3 Objective: Follow ANSI Standards and ISA BMPs. Strategy: Provide to staff and contractors	Provide Tree Care ANSI Standards and BMPs to staff and contractors	2/1/2026	

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Year 2- FY 2026/27			
Goal #1 Objective: Tree removals and priority pruning, Strategy: Conduct Priority Removals. Goal #5 Objective: Mitigate identified risk. Strategy: Mitigate Substantial Risk	Create RFP for 66 Priority Removals, Substantial risk, remove trees.	4/30/2027	
Goal #1 Objective: Tree removals and priority pruning, Strategy: Conduct 1/2 Priority Pruning. Goal #5 Objective: Mitigate identified risk. Strategy: Mitigate Elevated Risk	Create RFP for 130 trees over 12" dbh for Priority Pruning.	3/15/2027	
Goal #2 Objective: Proper planting and establishment practices. Strategy: Tree watering	Acquire watering equipment, hire and train staff	5/30/2027	Watering staff budgeted annually
Goal#2 Objective: Increase managed tree count to 1,750 trees . Strategy: Plant 100 trees per year. Goal #4 Objective: Decrease percentage of Maples . Strategy: Limit Maple planting	Create planting plan using right tree/right place, no Maples planted, create RFP for 100 trees in spring of 2026, plant trees, inspect for adherence to planting and establishment specs	6/30/2026	100 trees budgeted and planted
Goal #3 Objective: Follow ANSI Standards and ISA BMPs. Strategy: BMP training	Annual staff training on tree care BMPs-in-house and seminars	begin May 2027- ongoing	
Goal #3 Objective: Follow ANSI Standards and ISA BMPs. Strategy: Adhere to tree construction protection standards	Adherence to tree protection standards by all contractors and park staff for all construction projects will be required and monitored.	4/30/2027	Documented inspections by staff or consulting arborist for all construction projects
Year 3- FY 2027/28			
Goal #1 Objective: Tree removals and priority pruning, Strategy: Conduct Standard Removals. Goal #5 Objective: Mitigate identified risk. Strategy: Mitigate Elevated Risk	Schedule 1/2 Standard Removals: contract 100 trees over 12" (all Elevated risk)	4/30/2028	

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Goal#2 Objective: Increase managed tree count to 1,750 trees . Strategy: Plant 100 trees per year. Goal #4 Objective: Decrease percentage of Maples . Strategy: Limit Maple planting	Create planting plan using right tree/right place, no Maples planted, create RFP for 100 trees in spring of 2027, plant trees, inspect for adherence to planting and establishment specs	6/30/2027	100 trees budgeted and planted
Goal #1 Objective: Maintain an inventory. Strategy: Utilize ESRI software to keep removals and plantings up to date	Staff keeps inventory planting and removal data up to date using computers and/or tablets on the GIS platform .	4/30/2028, ongoing	Removal and planting lists match updated inventory
Goal #7: Public Awareness. Objective: Increase public awareness. Strategy: Public Meetings.	Utilize staff or consulting arborist to conduct a public meeting to educate residents on the Village’s management of the urban forest, on the benefits trees provide the community, on the care of trees, and on how residents have a role in supporting the urban forest across the community.	11/15/2027	Public input noted and further public meetings scheduled as needed

Year 4- FY 2028/29			
Goal #1 Objective: Tree removals and priority pruning, Strategy: Conduct Standard Removals. Goal #5 Objective: Mitigate identified risk. Strategy: Mitigate Elevated Risk	Schedule 1/2 Standard Removals: contract 97 trees over 12" (includes all remaining Elevated risk)	4/30/2029	
Goal#2 Objective: Increase managed tree count to 1,750 trees . Strategy: Plant 100 trees per year. Goal #4 Objective: Decrease percentage of Maples . Strategy: Limit Maple planting	Create planting plan using right tree/right place, create RFP for 100 trees in spring of 2028, 2% may be Maples, plant trees, inspect for adherence to planting and establishment specs	6/30/2028	100 trees budgeted and planted
Goal #6 Objective: Create plan for replacing forestry capital equipment. Strategy: Create 10-year plan	Create 10-year capital expenditure plan for replacing existing and procuring new forestry equipment.	1/15/2030	Schedule is created and used for 2029/30 and onward budgets

CITY OF KEWANEE URBAN FORESTRY MANAGEMENT PLAN

Year 5-FY 2029/30			
Goal #1 Objective: Tree removals and priority pruning, Strategy: Conduct Low Priority Removals.	Schedule 38 Low Priority Removals and 12 low quality or declining trees over 12"	4/30/2029	
Goal #1 Objective: Create Cycle pruning program. Strategy: Implement 7-year cycle pruning schedule	RFP to cycle prune 350 trees over 12", based on the City-wide cycle prune schedule	Begin 11/1/2029, ongoing	Cycle pruning budgeted and contracted annually
Goal#2 Objective: Increase managed tree count to 1,750 trees . Strategy: Plant 100 trees per year. Goal #4 Objective: Decrease percentage of Maples . Strategy: Limit Maple planting	Create planting plan using right tree/right place, create RFP for 100 trees in spring of 2029, 2% may be Maples, plant trees, inspect for adherence to planting and establishment specs	6/30/2029	100 trees budgeted and planted
Goal #2 Objective: Planting and establishment. Strategy: Establishment pruning	Train in-house staff to conduct establishment pruning on all new plantings in the third year after planting. Begin pruning.	Begin November 2029-ongoing	Staff time budgeted annually for establishment pruning.
Goal #7: Public Awareness. Objective: Increase public awareness. Strategy: Arbor Day activity	Coordinate with the Kewanee Park District and/or School District 229 to annually plant trees with students at park or school sites on the last Friday in April.	begin 4/1/2030, ongoing	Arbor Day program scheduled annually

Year 6-10 FYS 2030-2035			
Goal #2 Objective: Reduce low quality tree species. Strategy: Remove 10/year	Inspect and contract removal of 10 low quality species trees per year, begin with below average Siberian Elms	begin 11/1/2030, ongoing	10 undesirable species trees noted as removed in the inventory annually
Goal #4 Objective: Increase species diversity. Strategy: Review acceptable/unacceptable planting list	Review the acceptable and unacceptable species planting list periodically to ensure that it is maintained in accordance with the latest information on specific trees.	1/31/2031	List created and utilized for planning. Revisit in year 10.

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<p>Goal #6 Objective: Investigate and budget for forestry personnel. Strategy: Create 10-year plan</p>	<p>Track in-house and contracted hours spent on implementing the forestry management plan for plan years 1-6. Create a 10-year plan for additional personnel and budgets needed to implement the management plan for the urban forest.</p>	<p>12/1/2031</p>	<p>Schedule created and used for 2031/32 and onward budgets</p>
<p>Goal #2 Objective: Maintain an inventory. Strategy: Update tree inventory.</p>	<p>Contract forestry consultant to update the tree inventory and repeat every five years</p>	<p>12/15/2032</p>	<p>Inventory data update completed for budgeting next FY work</p>
<p>Goal #5 Objective: Tree Risk policy and procedures. Strategy: Create and adopt a Tree Risk Policy</p>	<p>Create and adopt a Tree Risk Policy that states the intent of the City of Kewanee to make reasonable efforts to identify potential elevated risk and high-risk trees that are in their care.</p>	<p>3/1/2032</p>	<p>Policy adopted into Village Risk Management Plan</p>
<p>Goal #5 Objective: Tree Risk policy and procedures. Strategy: Create and adopt tree risk procedures</p>	<p>Create, adopt and implement procedures that identify potential tree risk and allow staff to make reasonable risk mitigation decisions based on the risk levels found, level of acceptable risk, budget constraints, and other factors that affect work priorities.</p>	<p>3/1/2032</p>	<p>Procedures adopted into procedure manual and implemented by staff</p>

PROJECTED BUDGET

The following budget projections are conservative figures based on current industry rates for the services listed. The budget begins with \$114,160 in fiscal year 2025/26 and from there increases as priority pruning and removals identified in the 2025 inventory are finished up in FY 2029/30, followed by regular ongoing maintenance expenses projected to be \$152,952 in 2035.

	Milestones	<u>2025/26</u>	<u>20226/27</u>	<u>2027/28</u>	<u>2028/29</u>	<u>2029/30</u>	<u>2030-2035</u>
REMOVALS	Trees Removed	65	65	100	100	50	50
	Diameter Inches	2,190"	2,190"	2500"	2,500"	1,250"	1,250"
	Notes	1/2 Priority Removals	1/2 Priority Removals	1/2 Standard Removals	1/2 Standard Removals	Low Priority and Estimated Annual Removals	Estimated Annual Removals
	Removal Cost (2025)	\$87,600	\$87,600	\$100,000	\$100,000	\$50,000	\$50,000
	Removal Cost (CPI)	\$87,600	\$87,600	\$100,000	\$100,000	\$50,000	\$51,500

	Milestones	<u>2025/26</u>	<u>20226/27</u>	<u>2027/28</u>	<u>2028/29</u>	<u>2029/30</u>	<u>2030-2035</u>
PLANTINGS	Trees Planted	25	100	100	100	100	100
	Planting Cost (2025)	\$10,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000
	Planting Cost (CPI)	\$10,000	\$40,000	\$40,000	\$40,000	\$40,000	\$41,200

	Milestones	<u>2025/26</u>	<u>20226/27</u>	<u>2027/28</u>	<u>2028/29</u>	<u>2029/30</u>	<u>2030-2035</u>
PRUNING	Trees Pruned	130	130	0	0	350	350
	Notes	1/2 Dead Limb & Priority Pruning	1/2 Dead Limb & Priority Pruning			7 Year Cycle Pruning	7 Year Cycle Pruning
	Cost (2025)	\$14,560	\$14,560	\$0	\$0	\$39,200	\$39,200
	Cost (CPI)	\$17,472	\$17,472	\$0	\$0	\$39,200	\$40,376

	Milestones	<u>2025/26</u>	<u>20226/27</u>	<u>2027/28</u>	<u>2028/29</u>	<u>2029/30</u>	<u>2030-2035</u>
MISC FORESTRY	Notes	Appraisals/ Inventory Updates/ Risk Management	Appraisals/ Inventory Updates/ Risk Management	Phase II Inventory/ Update Mgmt Plan	Appraisals/ Inventory Updates/ Risk Management	Appraisals/ Inventory Updates/ Risk Management	Appraisals/ Inventory Updates/ Risk Management
	Cost (2024)	\$2,000	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500
	Cost (CPI)	\$2,000	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500

TOTALS	TOTALS - 2025 \$	\$114,160	\$144,660	\$142,500	\$142,500	\$131,700	\$131,700
	TOTALS - CPI 3%	\$114,160	\$144,660	\$142,500	\$142,500	\$131,700	\$135,576

SECTION 5: TREE MAINTENANCE ACTIVITIES

TREE REMOVALS

Reasons for Tree Removal

Removal of trees in public spaces is an unavoidable reality of managing large tree populations. When the trunk, branches or roots fail, a standing tree can cause personal injury or property damage, and even small dead trees can be an eyesore. Old trees can hold great sentimental value, and many people become attached to them. However, there are times when their presence creates a public hazard, and it is at those times that action must be taken to ensure public safety. It is also important to remember that the removal of a tree today is the promise of a new tree for tomorrow!

Removal of trees on City property shall always be at the discretion of Kewanee staff and/or the forestry consultant. Trees will never be removed without a sound reason from staff or forestry consultant. Neighboring residents and concerned patrons may request a tree to be removed for reasons not detailed below, and these requests will be reviewed by City staff, the Board of Trustees, or the forestry consultant.

Trees with a greater need for removal based on public safety will always hold a higher priority. Under no circumstances will The City of Kewanee be responsible for trees which are not on its property, except for pruning potentially hazardous limbs overhanging its property.

Dead or Dying

If a tree is biologically dead or nearly dead, it will require removal. Trees which are standing dead, have approximately 50% dead crown or greater, or have less than approximately 40% structurally sound wood in the cross-section of the trunk, shall be removed as expediently as practical. These determinations shall be at the discretion of Kewanee staff or the forestry consultant.

Diseased or Infested

Diseases are caused by viral, fungal, or bacterial pathogens. Infestations are caused by insects or other small animals. Dutch Elm Disease and Oak Wilt, for example, are fungal diseases that kill Elm and Oak trees when they are infected. Emerald Ash Borer is an insect which kills Ash trees by infesting them. The prompt removal of diseased or infested trees limits the exposure of other nearby trees. The removal of one tree may save dozens of others. Trees deemed to be diseased or infested by Kewanee staff or the forestry consultant shall be removed as expediently as possible in order to slow the spread of such insects and diseases.

High or Extreme Risk

Tree risk is the potential of a tree or tree part to impact a nearby person or piece of property and cause property damage or personal injury. This topic is of great interest in arboriculture today, and the insurance industry is becoming increasingly involved in the process of assessing and

managing the risk posed by trees. Litigation involving trees is a perennial concern for public entities. All trees in the inventory were assessed for a basic level of risk, and 1,057 trees were found to have some level of elevated risk.

If a tree is deemed to be a high or extreme risk the entire tree may need to be removed as a means of reducing its residual risk to zero. However, risk can often be mitigated by removing a portion of the tree or other corrective measures. City staff, the forestry consultant or another TRAQ (Tree Risk Assessment Qualified) risk assessor may assess the tree and prepare a tree risk assessment report to determine risk mitigation options. If such risk can best be safely mitigated by tree removal, as opposed to pruning or other measures, then timely removal is critical because of potential exposure of the public or property to potential harm.

Emergency / Storm Damage Removals

A tree shall be removed if it has been severely damaged and/or compromised by lightning, wind, or other such weather event. "Storm-damaged" shall be generally defined as a tree which has lost 33% or more of its crown, has a large crack or other wound in the trunk, has a lean of greater than ten degrees from vertical resulting directly from strong winds, has sustained a lightning strike, or other such issues directly related to storm events. City staff or the forestry consultant shall determine the need for removal of a tree in these cases. However, in emergency situations such as a tree impacting a person, vehicle, power lines, or other such emergency, Kewanee may perform any actions necessary to abate public hazards so long as they are in compliance with all relevant arboricultural standards and practices.

Damage from Construction or Vehicle Strike

City staff or the forestry consultant shall assess trees that have been impacted by a vehicle strike or piece of construction equipment. If the tree has suffered physical damage or extreme root compaction and is likely to decline and become high risk, it will be scheduled for removal to maintain public safety. That decision will be based on the best professional judgement of the forestry consultant or staff.

Interference with Utility or Signage

A tree shall be removed if it is interfering with the function or visibility of official traffic control devices or has impacted above or belowground utilities in a manner that cannot be mitigated by pruning or other measures. In these cases, it is likely that no new tree will be planted on these sites.

Overplanted and Underperforming

No healthy tree shall be removed for the sole reason of having been overplanted. As a result of this plan, Kewanee will be enhancing diversity in the urban forest, with the goal of building a diverse urban forest. Overplanted species listed as being in poor condition will be reviewed to assess further decline or recovery. Those trees in noticeable decline shall be removed at the discretion of staff and/or the forestry consultant. This will be used as a preventative measure so

that these trees do not continue to decline to a point where they become hazardous and not used as a reason to remove an otherwise healthy tree.

Implementing the Removal Plan

The first step towards attaining City of Kewanee's forestry goals will be to remove trees which are diseased, dying, or present a hazard. At present, there are 502 trees which have been identified in the inventory for removal. Of these, 131 are listed as Priority Removal, 309 are listed as Standard Removals, and 62 are listed as Low Priority Removals based on the tree inventory data. A short-term objective of this Urban Forestry Management Plan is to have all identified trees marked as Removals during the inventory to be removed within five calendar years of this plan's adoption. Trees 12" and under are assumed to be small enough for City staff to perform the removals; trees 13" and larger will be contracted.

By percentage, removals represent approximately 12.6% of the total population, which is a higher than expected percentage. Typically, municipal inventories reveal between 3-5% of the tree population requiring some form of removal. The 131 Priority Removals are scheduled to be removed in the first and second years of the plan, all are over 12" that are to be removed by a qualified contractor. Of the 309 Standard Removals, 197 are over 12" to be removed by professional arborists; these are scheduled over years three and four. There are 62 Low Priority removals; 38 are over 12" to be removed by contractors in year five, the remainder can be removed in-house.

After this initial five-year period where removals identified in the inventory area are addressed, it is anticipated that the background rate of tree removal will be approximately 50 trees per year. From 2030 forward, re-evaluation of the tree population on an annual or semiannual basis by staff or the forestry consultant will specify which trees require removal. These numbers are meant to be placeholders for budget calculations and diversity standards. This does not require that 50 trees be removed each year, this is simply a projection based on the existing inventory data.

For purposes of projection, costs have been estimated using a rate of \$40/diameter inch for tree removal and stump grinding, which is a conservative estimate based on current market pricing. Rates could certainly be found lower than this in a competitive bid process or using in-house labor. As is the case with all cost projections for this Plan, no cost increase is assumed for the first four years, and a 3% annual cost increase is assumed thereafter. This is also a conservative estimate based on the Consumer Price Index, and actual costs are likely to be lower than projected.

City of Kewanee Tree Removal Basic Requirements and Standards

All the following requirements and standards shall be met during tree removal activities as a matter of local policy. For a more detailed view of the specific ANSI and ISA standards, see Appendix I.

Safe Removal of a Tree to an Appropriate Flush Cut

Tree removal can be dangerous but is very safe when performed by professionals. Therefore, all tree removal activities on City of Kewanee property should be performed under the guidance of a certified arborist or other experienced tree worker. This may be the supervision of staff or the forestry consultant alongside a contractor. Proper removal of a tree involves safe removal and lowering of all portions of the tree according to all relevant ANSI standards and Best Management Practices.

Stump Grinding

Within a reasonable amount of time following the removal, stumps and surface roots should be removed using an approved stump grinding machine, such that the stump is ground to a minimum depth of 6 inches, and no surface roots are visible. If the site is to be planted with a new tree, that depth should be increased to 12 inches below the soil surface. This will ensure that a new tree may be successfully planted, and that no re-sprouting will occur from the old stump. The depths to which the stump must be ground may be altered by the City depending on needs for specific circumstances or contracts. Until the planting space is fully restored, the stump hole should be filled and compacted to ground level using the debris resulting from the stump removal.

Planting Site Restoration

Once the tree has been safely removed and the stump has been ground out, the open planting space should be fully restored if a tree is not scheduled to be planted in or adjacent to the same spot. Site restoration consists of removing the stump chips from the hole, filling it with a quality mineral topsoil, tamping down to match the surrounding grade, spreading grass seed over the top of the topsoil, and securing turf blanket over the topsoil. This will ensure that grass grows to restore the aesthetics and function of the old site and prevents tripping hazards from the removal scar.

City of Kewanee Internal Policies

- All personnel directly involved with the process of chainsaw operation, climbing, bucket truck operation, and rigging limbs shall be provided with sufficient training and experience to perform such duties while employed by City of Kewanee, whether in-house grounds maintenance, or a contractor employed by the City.
- Only qualified utility arborists may perform tree removal operations within ten feet of an electric utility line.
- The City will not remove healthy trees to meet diversity goals, unless the tree poses a risk to people or property.
- The City shall not perform or assist, programmatically or financially, with the removal of trees on private property. Public tree ownership is defined as having 51% or greater of its trunk diameter on City property. Limbs overhanging City property may be pruned back to the property line with adjacent properties.

TREE PRUNING

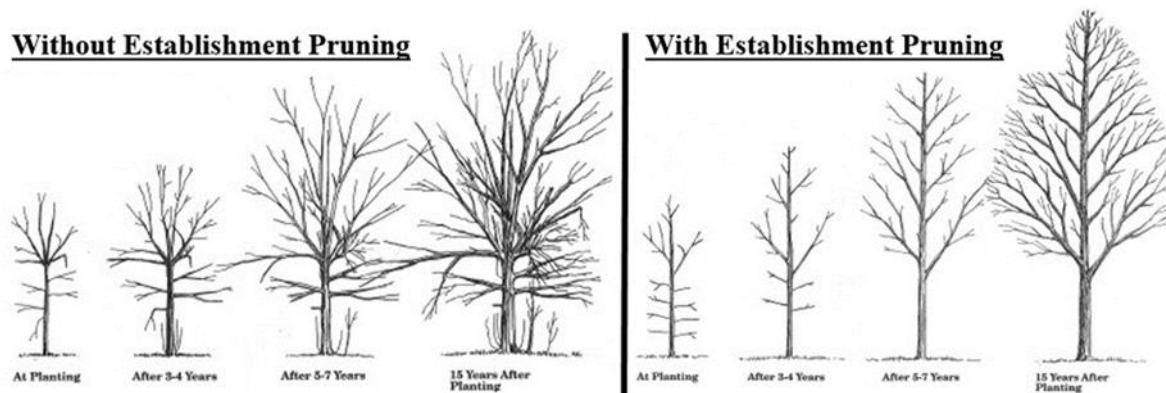
Tree pruning is one of the most cost-effective maintenance activities which can be performed to maintain a tree population for its greatest benefits and lowest risk. Pruning provides several important services for trees by reducing the risk of failure, providing clearance for utilities or other structures, reducing wind resistance and wind damage, maintaining overall tree health, and improving overall aesthetics.

Though tree pruning may seem expensive, the cost of maintaining trees is significantly less than the costs associated with trees damaging property or injuring residents or patrons. The benefits trees provide when healthy and well maintained can be prolonged and significantly increased. A cycle pruning program is the hallmark of an effective forestry program, and it is highly recommended that Kewanee plan to increase budgets for this essential expense.

Reasons for Pruning

Establishment Pruning

Establishment pruning of newly planted trees is the single most cost-saving measure in tree care, as it establishes good form and branch structure for the life of the tree. Establishment pruning should be performed at a minimum of one time prior to the tree reaching six inches in diameter. Once established, the tree will only require periodic cycle pruning to maintain an appropriate form for the urban forest and to maintain health and keep the tree free of dead limbs.



Cycle Pruning

A Best Management Practice in urban forestry is that trees should be pruned on a cyclical basis as preventative maintenance. No tree should go more than seven years without proper pruning. Cycle pruning ensures that dead branches, storm damaged limbs, or unsightly growth are removed before becoming hazardous or bad for the health of the tree. Cyclical pruning also ensures the proper leaf to stem ratio, which provides structural support for the tree. It also ensures that pruning stays relatively inexpensive, as severe issues do not have time to develop. Cycle pruning is a maintenance activity that, if performed regularly, ends up needing to be performed less often.

Emergency / Storm Damage Pruning

Emergency pruning is nearly always necessary to mitigate severe risk after storm events, such as limbs which have fallen and are blocking traffic, have impacted a structure or playground, are interfering with a utility, or are hanging and in imminent danger of doing any of the above. Emergency and storm damage pruning should be conducted at the discretion of the City, with the best interests of the public in mind. This is one of the few occasions on which the recommendations of this Plan may be temporarily suspended. When life and property are in imminent danger due to conditions associated with a downed tree or tree part, the City may take whatever remedial action is practical and reasonable to mitigate such imminent risk.

Sanitation Pruning

When a tree has been diagnosed as having been diseased or infested with a pest or disease, sanitation pruning may be employed to maintain the tree while removing the diseased or infested portions. This technique is only effective when the host tree is infected/infested with certain pests and pathogens, and only in a localized area of the tree. With more widespread cases of disease or insect infestation, removal may be the most cost-effective and safest option to avoid endangering other nearby trees, as these pests and diseases tend to spread, particularly when there are more of the same species nearby.

Removal of High-Risk Limbs

At times, a tree may not pose a high risk, but a single limb may have defects that make it hazardous. At these times, the removal of such limbs or parts may render the tree to be low risk again, without causing permanent damage to the tree.

Implementing the Pruning Plan

The most critical pruning needs of the City of Kewanee were prioritized. This priority list begins with trees identified as Priority Pruning and Dead Limb pruning. During the inventory, 1,477 such trees were identified, and the schedule of this plan is to prune these in the first and second years of the plan. The next priority to be completed in the fourth year of the plan is to begin establishment pruning of all newly planted trees by the third year after planting. This establishment pruning will be an annual in-house maintenance item. In the fourth year of the plan the annual cycle pruning by a contractor of an estimated 1,260 trees per year can be implemented. This cycle covers the pruning of all trees over 12" DBH in the inventory over the seven-year cycle. This pruning cycle will begin in the fifth year of the plan.

Cycle Pruning Schedule

Since young trees 12" and less in diameter are easy to prune, it is assumed that Kewanee staff can prune the 1,010 trees that are less than 12"; the cost for this is not separated as an additional budgetary expense except for the cost of staff training. If the City chooses to contract this work out, \$40/tree can be used for budgeting the pruning of these trees. For medium (12"-24") and large (24"+) trees, average figures of \$75 and \$150 per tree (respectively) were used in the budget calculations, based on average cost in the industry. An average cost of \$112 has been

used for each of the 1,068 trees over 12" per year to be pruned by a contractor. The budget also assumes that the tree removal recommendations are followed and the removed trees are not included in the pruning schedule. Consistent with other budget tables, a 3% annual CPI increase was added after the first 5 years.

City of Kewanee Internal Policies

- All full-time staff involved in tree care shall receive chainsaw training. All contractual work is done under supervision of a certified arborist.
- No pruning or maintenance activity on a tree that is within ten feet of a power transmission line shall be performed by a City employee.
- No heading, pollarding or espalier pruning shall be conducted on Kewanee-owned trees, and no wound dressings shall be used under any circumstances, without prior approval of City of Kewanee.
- The need for pruning and maintenance of individual trees shall be at the discretion of City staff and/or the forestry consultant.
- No more than 25% of a tree's crown shall be removed during pruning operations to preserve the health of the tree. Any more than 25% of the crown being removed puts the tree in danger of severe dieback, and removal should be considered at that point.

Private Property Trees

City of Kewanee shall not be responsible for the pruning of trees located on private property. The City reserves the right to prune portions of trees overhanging their property back to the adjacent property line, but is under no obligation to do so, and will perform such pruning at the discretion of City staff and/or the Forestry Consultant.

TREE PLANTING

Whereas tree removal and pruning are necessary to promote public safety, planting of new trees must occur to increase diversity and canopy cover. This plan recommends planting 3,000 trees over the coming 10 years. These trees will be planted by City staff or contractors. Costs have been estimated using containerized and/or balled and burlapped 2" trees; \$400 per tree (installed) has been used. This is a conservative estimate based on retail costs, and the City will be likely be able to execute planting at a more favorable rate.

The Importance of the Right Tree in the Right Site

Urban forestry has an unfortunate history of not planning carefully for tree planting. Whatever was readily available, inexpensive, urban tolerant, and grew fast was seen as desirable, and often the planning of tree plantings was left to developers, nurseries or landscapers. With our history of invasive insects and diseases in the Midwest region and knowing these will only get worse in the future, it is more crucial than ever to have a process for planning tree plantings.

This process involves assessing each site to be planted in much the same way we would assess a tree, except that in this case, we look for factors such as available above and below ground growing space, how much light the site receives, amount of soil moisture present, and possibly other factors such as soil pH and texture. Once this information is collected, planting sites can be matched with trees which are well suited to those sites. Matching the right tree to the right site will result in trees which establish faster, grow more vigorously, live longer, and provide far greater benefits. Even a simpler version of this process is better than nothing.

Playing an active role in tree planting planning also allows for meeting diversity standards such as the taxonomic, spatial, and age class diversity principles outlined above, and attempts to get the tree population into compliance with the “20-10-5 Rule”. Being targeted about species selection also allows the use of species that are slightly more difficult to find appropriate sites for. Species that are considered less urban tolerant can still be planted when the appropriate site is found.

The success of a tree depends on where and how it is planted. City staff or the urban forestry consultant should assess planting sites before trees are purchased and installed each year, to ensure the correct tree is being planted for the correct site. Each tree planted represents a decades-long commitment, and this planning helps to increase the benefits to the community from this commitment. A list of acceptable species to be planted appears in Appendix A.

Nursery Stock Procurement

Nursery stock quality is another aspect of planning which can help a tree establish, survive, and thrive to provide great benefits to the community. City staff or the urban forestry consultant should inspect and select every tree which is to be planted on property to minimize the possibility of installing lower quality nursery stock. Specifications should be for material no smaller than 1.75” caliper, with good form for the species, planted as either balled and burlapped or minimum 5-gallon size containerized stock.

Currently, the nursery industry is recovering from a nursery stock shortage due to high demand to replace Ash trees lost to Emerald Ash Borer, which impacted the availability of some species. It is preferable to not accept substitutions in the requested species lists, as many nurseries may still attempt to substitute overplanted trees for some of the higher diversity species which may still be difficult to obtain. It is recommended to have an approved substitution prepared for each requested tree species. A list of species and acceptable substitutes has been included in Appendix B.

Tree Transport and Planting

Proper transport and planting procedures determine a tree’s success after planting. Even healthy trees from the field, if improperly transported, may dry out during transport or suffer structural damage to root balls.

Trees planted too deeply will suffer from root compaction and trunk decay. Trees planted without properly dug holes may suffer from stunting. Trees planted without proper removal of packaging materials may develop girdling roots. Trees planted too high may have surface root desiccation. Trees improperly staked or with improper trunk protection may suffer from trunk wounds or girdling of the entire trunk. The standards and Best Management Practices for tree transport and planting are detailed in Appendix J. Trees may be planted by a local volunteer work force if the workers have been adequately trained by the forestry consultant or other local qualified organization prior to planting, and trees are of a smaller size such as containerized stock.

Tree Spacing and Visibility Requirements

Minimum tree spacing between large, medium, or small sized deciduous shade trees should be appropriate for the species and conform to any local standards. It is generally recommended this be no less than 40 feet between plantings, with some exceptions for smaller trees. This will allow trees to grow to their full potential without heavy competition for water and nutrients with neighboring trees, and without limited space for crown growth.

Watering

Watering of newly planted trees is essential to their establishment, growth, and survival, particularly for at least the first two years of their lives. Use of in-house labor and equipment, versus contracting out this work, is recommended to keep costs down.

Challenges of Urban Plantings

Urban planting sites are a difficult environment for a tree to thrive in, and based on long term data, it is expected that 5-10% of new plantings fail each planting cycle. The City's contracts for tree planting should include a one to two-year replacement warranty for any new trees that fail to thrive in their new environment. Urban tree plantings can face an uphill battle in many ways, due to limited soil volume, salt runoff, airborne pollutants, and other factors. New planting mortality is to be expected, despite best efforts to prevent such an outcome, but the planning measures outlined above will help to mitigate annual new planting mortality.

City of Kewanee Internal Policies

- Planting sites shall be determined and monitored using the City's tree inventory, in conjunction with staff and forestry consultant input.
- New planting sites should be 10 feet away from signage, driveways, intersections, and utility structures. If this distance cannot be maintained, the site should not be planted, even if a tree was removed from the same site.
- Choice of species for planting should be made according to the City's taxonomic, spatial, and age-class diversity goals. A diverse and resilient urban forest minimizes exposure to financial, environmental, and health risks while maximizing aesthetics, environmental benefits, and ecosystem services to its residents and patrons.
- All planting stock shall be grown within 150 miles of the City of Kewanee.

- Acceptable nursery stock shall conform to the following standards:
 - Minimum of 1.75 inch caliper, measured at six inches from the trunk flare.
 - Root ball conforms to ANSI Z60.1 Standards for Nursery Stock.
 - Less than 10% deadwood in the crown.
 - Architecture consistent for the species, cultivar, or variety in question.
 - No included bark or other such narrow branch attachments, unless consistent with species or variety.
 - Free of pests or pathogens.
 - On the approved species list for City of Kewanee.
- Planting and digging of certain species shall only occur at certain times of year, in accordance with nursery industry best management practices and professional judgement. These times are subject to the professional opinions of both staff and its contractors.
- JULIE, or another similar utility locating service, shall be contacted, and all utilities located a minimum of three days before planting is scheduled to begin.
- A minimum of a one-year replacement guarantee shall be extended from approved nurseries and plantsmen for all new plantings rated to hardiness zone five or lower.

TREE RISK ASSESSMENTS

Trees provide ecosystem and aesthetic benefits, but all trees also pose some degree of risk. Determining the acceptable level of risk, along with effectively managing that risk, is a key priority for urban forestry operations. As a tree manager, the City of Kewanee must always assume some degree of risk. It is up to the City to track that risk to ultimately decide how to take steps to mitigate trees which pose such risk in a manner which is responsible both economically as well as in the interest of public safety.

Levels of Risk Assessment – An Overview

These Risk Assessment Levels are based on the International Society of Arboriculture's (ISA) Tree Risk Assessment Qualification (TRAQ) protocols, as well as the ANSI A300 Part 9 (Tree Risk Assessment) Standards. The TRAQ forms can be found in Appendix H at the end of this report. All trees in Kewanee were assessed for a basic level of risk during the inventory. These assessments were rapid assessments, and do not represent any formal level of TRAQ risk assessment and are not legally binding. They are intended to provide Kewanee with data showing a need for a more detailed assessment of individual trees such as those listed below.

A Level 1 Assessment, also called a "limited visual assessment", is a basic analysis of obvious physical tree defects and condition. The assessor walks or drives by the tree, assesses it quickly for defects, evaluates the risk posed by the subject tree, and reports the results of the assessment to the tree owner. Often, prior to a recommendation, a more detailed Level 2 or Level 3 assessment will be required to gather additional data.

A Level 2 Assessment, also called a “basic assessment”, is a report detailing the information collected during a detailed visual inspection of the tree and the surrounding site. Such an inspection requires a 360 degree walk around, and may include the use of simple tools, such as binoculars, magnifying lenses, mallets, probes, and trowels or shovels. The goal is to get a more complete picture of the tree in its environment, as well as previous histories of failures, and a root to branch evaluation of not only the tree but also potential “targets” which falling trees or tree parts may impact. Targets are structures, people, vehicles, or other things which may be damaged or injured by trees.

A Level 3 Assessment, also called an “advanced assessment”, provides detailed information about specific tree parts, targets, and risk associated with each potential interaction. It requires specialized equipment such as bucket trucks, resistance drills, sonic tomographs, and other such equipment. This is the most detailed and time-intensive type of assessment, and is typically only performed when a decision to retain or remove a tree is very difficult, as would be the case for a high quality tree near a potential target that has significant defects, the extent of which are not known, but must become known before making a decision.

Tree Risk Policy and Procedures

A sample Tree Risk Policy and Procedures is given in Appendix H.

Tree Risk Policy Outline

1. The Tree Risk Management Policy should state that the municipality:
 - a. Has responsibility for the care and maintenance of municipal trees.
 - b. Must balance the benefits of the urban forest against the potential risks that trees may pose people and property.
 - c. Intends to make reasonable efforts to identify and manage tree risk.
 - d. Will make risk mitigation decisions based on the risk levels found, level of acceptable risk, budget constraints, and other factors that affect work priorities.

2. The Policy Statement formalizes that the municipality will:
 - a. Identify trees owned and/or maintained by the municipality.
 - b. Assess potential risk from these trees.
 - c. Utilize current professional standards and BMPs for risk assessments.
 - d. Prioritize identified risk.
 - e. Identify risk mitigation options.
 - f. Create a risk mitigation plan.
 - g. Implement plan.

Tree Risk Management Procedures Outline

1. Define municipal/district-maintained trees
 - a. In an up-to-date comprehensive tree inventory, and/or
 - b. By ordinance defining who maintains ROW trees or

- c. As all trees on defined owned/leased/managed property
2. Specify how risk will be identified
- a. Identify the professional standards and BMPs that are to be used
 - i. *ANSI A300 Part 9: Risk Assessment*
 - ii. International Society of Arboriculture’s (ISA) *Best Management Practices: Tree Risk Assessment*
 - iii. Other?
 - b. What Risk Assessment methodology will be utilized
 - i. Level 1 Limited Visual Tree Risk Assessment: a visual assessment from one or more sides of a tree looking for obvious defects. Used to quickly assess individual trees or populations of trees.
 - ii. Level 2 Basic Assessment: a detailed visual assessment of a tree and the surrounding site. Simple tools may be used. Used on individual trees.
 - iii. Level 3 Advanced Assessment: a detailed assessment using specialized tools and techniques on individual trees.
 - c. Who conducts Risk Assessments
 - i. Employees or contractors that hold an ISA Tree Risk Assessment Qualification (TRAQ) or have sufficient professional experience in lieu thereof can conduct Level 1 Assessments.
 - ii. Only TRAQ Arborists will conduct Level 2 and 3 Assessments.
 - d. How will assessment findings be reported
 - i. Level 1, 2 and 3 Assessment findings will be formalized in written reports by the assessor and submitted to (City Manager, PW Director, etc.)
 - ii. Level 1 trees with defects will be GPS located with species, size, description of defect(s) and recommended maintenance.
 - iii. Levels 2 and 3 will follow ISA *Best Management Practices: Tree Risk Assessment* and *ANSI A300 Part 9: Risk Assessment* protocols, creating a written report using the ISA Form below, producing a *Risk Rating* for the individual tree. This rating is derived using the following ISA BMP Risk Rating Matrices:

Likelihood of Tree Failure Impacting Target

Likelihood of Failure	Likelihood of Impacting Target			
	Very Low	Low	Medium	High
Imminent	Unlikely	Somewhat Likely	Likely	Very Likely
Probable	Unlikely	Unlikely	Somewhat Likely	Likely
Possible	Unlikely	Unlikely	Unlikely	Somewhat Likely
Improbable	Unlikely	Unlikely	Unlikely	Unlikely

Risk Rating Matrix

Likelihood of Failure and Impact	Consequences			
	Negligible	Minor	Significant	Severe
Very Likely	Low	Moderate	High	Extreme
Likely	Low	Moderate	High	High
Somewhat Likely	Low	Low	Moderate	Moderate
Unlikely	Low	Low	Low	Low

1. Define how often assessments are conducted
 - a. Level 1 Assessments are used as a screening process to find higher risk trees and are conducted “periodically” or, may be defined more specifically, i.e., every year, every other year or every three or more years on all agency trees of a defined size (such as “all trees over 12” dbh”). Determine your standard. These assessments can also be a part of the agency’s tree inventory process.
 - b. Level 1 Assessments may need to be conducted after certain extreme weather events to identify broken and damaged trees and limbs. Define the timeframe of assessments from the end of the storm event.
 - c. Municipal/district staff will, in the course of their duties, note any possible tree defects and report any trees of concern to their supervisor. These will be reported to the (City Forester, Public Works Director, etc.) within (specified timeframe).
 - d. Level 2 and 3 Assessments will be conducted as needed on trees where there is a strong desire to keep the tree due to its high ecological quality, historical importance, or location value, but more data is required to determine the severity of the defect.
 - e. Level 1, 2 or 3 Assessments should be conducted within (specified timeframe) of a report from the public or a report from municipal/district staff of potential tree risk.

2. Specify how Risk will be mitigated
 - a. Based on the Level 1, 2 and 3 Assessment findings, the (City Forester, Arborist, Public Works Director, etc.) will then create prioritized risk mitigation options that may be utilized to reduce or eliminate those risks. (May elaborate on agency’s methods.)
 - b. If a Level 1 Assessment finds a tree with an imminent risk of failure and there is potential for injury to staff or the public, the (specify staff) will restrict access to the target zone of the tree or tree part and take action **as soon as possible** to mitigate or eliminate the risk through pruning, removal or other means.
 - c. Other potential elevated levels of tree risk found in the Level 1 Assessment may require pruning, cabling, bracing, removal or other means **as soon as practical** after the assessment.
 - d. If the Level 2 and 3 Assessments find any trees with an “Extreme” Risk Rating, the (specify staff) will restrict access to the target zone of the tree or tree part and the (City Forester, Arborist, Public Works Director, etc.) will act **as soon as possible** to mitigate the risk through pruning, removal or other means.
 - e. If the Level 2 and 3 Assessments find any trees with a “High” Risk Rating, the (City Forester, Arborist, Public Works Director, etc.) will implement risk mitigation measures through pruning, cabling, bracing, removal or other means **as soon as practical** after the assessment.
 - f. “Moderate” Risk Rated trees may be mitigated and/or retained and monitored. Mitigation measures may be scheduled as budgets and time allow. These trees may be monitored over months or even years.
 - g. “Low” Risk Rated trees may not require any mitigation and may be retained (if desired) and monitored.

GENERAL MAINTENANCE

Retaining a Consultant

The task of establishing or enhancing a robust urban forestry program can be difficult. There may be many new challenges and learning curves, contracts to renegotiate, bid documents to create, resident concerns to manage, and other responsibilities which may require the assistance of a professional. The forestry consultant may be involved in sourcing and interviewing contractors and vendors for tree pruning, removal, and planting operations, assisting in maintaining the tree inventory, training staff on tree health and risk assessments, assisting in explaining policies to residents and patrons, and preparing contract and bid specifications. The importance of this early relationship cannot be overstated, no matter how large or small the organization.

Chemical Applications

Trees, like people, sometimes contract pests and pathogens. Often these pests and pathogens can be controlled with a simple chemical application just as illnesses in humans can be controlled with medication. This practice is called plant health care. When financially practical, chemical control for common pests or pathogens may be utilized as a preventative or curative method and increase the aesthetics and benefits of the tree population.

The City, at its discretion, may opt to perform chemical treatments if it is environmentally and economically responsible. At present, the City currently uses a contractor to treat trees for various pests and pathogens when needed. Treatments performed by Kewanee on its own trees must be performed by a certified arborist who holds a valid Pesticide Applicators license. Residents of Kewanee may not perform chemical applications on any City-owned trees under any circumstances.

Water Management

The importance of water in the establishment, growth, and survivorship of trees cannot be overstated. Most trees adapted to our climate zone (USDA Zone 5b) are also adapted to the amount of moisture we have in an average year. However, younger trees with less expansive root systems are susceptible to prolonged drought. Young trees need supplemental watering, which is an essential maintenance activity and can prevent newly planted tree mortality.

As we anticipate approximately 3000 additional trees being planted over the course of the next 10 years, this concept becomes very important. The watering program is to be performed by in-house staff, but an outside contractor can also be used. If contracted, a general rule would be to expect to pay somewhere on the order of \$50 to water a tree several times throughout the first two growing seasons after planting. Planting 3000 trees per year, there would be 600 trees requiring water at any given time, for a total cost of around \$30,000 each year, if contracted. Of course, these numbers can be highly variable.

Mulch

Proper application of mulch is a necessary and cost-effective maintenance activity. Mulch has many benefits, including reducing weed growth in the root zone, protecting the tree trunk and root flare from lawn maintenance equipment, allowing water to move into the soil, reducing evaporation and drought stress, and creating a naturally fertile soil environment. Turfgrass competes for water and nutrients, and mulch reduces this competition. Not all mulching is beneficial. The practice known as “volcano mulching” is the practice of piling mulch against the trunk more than 3” deep. This causes moisture build-up against the trunk, and can cause decay of the trunk tissue, and possibly death. Material such as crushed limestone, red volcanic rock, or rubber pellets can alter the soil chemistry in an undesirable way, and cause dieback or tree death.

All newly planted trees should have mulch applied appropriately. Ideally, Kewanee should mulch all trees 12” DBH and smaller, but for now, mulch all newly planted trees, and preventing volcano mulching should be a primary concern.

Tree Preservation and Management During Construction

In many municipalities, ordinances exist to protect trees and shrubs from construction activities. The intent of these ordinances is to protect the benefits that those trees and shrubs provide to the community. Trees and shrubs may be privately owned but are also community resources that provide benefits such as aesthetics, storm water benefits, energy savings, carbon sequestration and increased property values. Therefore, tree and shrub protection and preservation during construction represents an investment in the community. Ensuring the protection and preservation of these trees while minimizing burdens to businesses, developers, and residents is essential to a healthy urban forest. Tree protection and preservation during periods of construction involves protecting trees from damage caused by construction activities. This damage includes physical and chemical damage to the trunk, branches, and roots. Damage may be caused by equipment such as vehicles, backhoes, skid steers, or other construction equipment. The effects of damage to the visible above ground portions of the tree can be obvious, as when branches are broken. But hidden effects such as root compaction or improper grading may not become evident for years until the tree begins to die back. The tree protection detail in Appendix G and the standards set forth in Appendix L are industry criteria with a proven record of success.

SUMMARY / CONCLUSION

By creating this Urban Forestry Management Plan, the City of Kewanee has taken an important step in investing in the urban forest’s future by creating both short and long term goals that will serve as milestones to guide the City in the management of their urban forest. These are goals that, as they are undertaken, will help strengthen the urban forestry program in Kewanee, maximizing the benefits that trees provide to the community and minimizing cost and risk. The City of Kewanee thanks its residents, stakeholders, grant funding organizations and consultants that have made this endeavor possible. It has been a pleasure to work with all involved as the City looks toward its future urban forestry endeavors.



APPENDIX A: Acceptable and Unacceptable Species

Species not appearing on this list can be approved or disallowed by consensus of the Director of Public Works or Kewanee Board of Trustees from recommendations of City staff and/or the Forestry Consultant.

NOT APPROVED	APPROVED SPECIES			
Any Size	Large Trees	Medium Trees	Small Trees	Evergreens
AILANTHUS	BALDCYPRESS	ALDER	AMERICAN REDBUD	ARBOR VITAE
AMUR CORKTREE	BEECH-AMERICAN	AMUR MAACKIA	APPLE-CRAB	DOUGLAS FIR
ASH-EUROPEAN	BEECH-EUROPEAN	BIRCH-RIVER	APPLE-EDIBLE	EASTERN REDCEDAR
ASH-GREEN	BUCKEYE-OHIO	BIRCH-WHITE	BUCKEYE-RED	FIR-CONCOLOR
ASH-WHITE	BUCKEYE-YELLOW	BLACKGUM	CHERRY-ORNAMENTAL	HEMLOCK-SPP
BOXELDER	CATALPA	ELM-CHINESE	DOGWOOD-SPP	JUNIPER-COMMON
BUCKTHORN	CHESTNUT-CHINESE	HARDY RUBBER TREE	HAWTHORN-COCKSPUR	PINE-AUSTRIAN
BURNING BUSH	DAWN REDWOOD	HAZELNUT-TURKISH	HAWTHORN-SPP	PINE-MUGO
CHERRY-BLACK/PIN	ELM-HYBRID	HORNBEAM-AMERICAN	HYDRANGEA-PEEGEE	PINE-WHITE
COTTONWOOD	GINKGO*	HORNBEAM-EUROPEAN	LILAC-SHRUB	SPRUCE-BLUE
ELM-AMERICAN	HACKBERRY	IRONWOOD	LILAC-TREE	SPRUCE-NORWAY
ELM-SIBERIAN	HICKORY-SPP	KATSURA	MAGNOLIA-SAUCCER	SPRUCE-SPP
HONEYSUCKLE	HONEYLOCUST	MAPLE-HEDGE	MAPLE-AMUR	YEW
MAPLE-NORWAY	HORSECHESTNUT	MAPLE-MIYABEI	MAPLE-JAPANESE	
MAPLE-SILVER	KENTUCKY COFFEETREE*	MAPLE-PAPERBARK	PEACH/NECTARINE	
MULBERRY-SPP	LARCH	MAPLE-SHANTUNG	PLUM-SPP	
PEAR-CALLERY	LINDEN-AMERICAN	MAPLE-TRIFLORUM	ROSE OF SHARON	
POPLAR-SPP	LINDEN-LITTLELEAF	OAK-CHINKQUAPIN	SERVICEBERRY-SPP	
POPLAR-WHITE	LONDON PLANETREE	OAK-ENGLISH	SMOKETREE	
PRINCESS TREE	MAGNOLIA-CUCUMBER	OAK-SHINGLE	WITCH HAZEL	
RUSSIAN OLIVE	MAPLE-SUGAR	PERSIAN IRONWOOD		
WALNUT-ANY	OAK-BLACK	YELLOWWOOD		
	OAK-BURR	GOLDEN RAIN TREE		
	OAK-PIN	MOUNTAIN ASH		
	OAK-RED	PEAR-EDIBLE		
	OAK-SWAMP WHITE	SASSAFRASS		
	OAK-WHITE	SEVENTH SON FLOWER		
	PAGODATREE			
	PERSIMMON			
	SWEETGUM			
	SYCAMORE			
	TULIPTREE			
	ZELKOVA			
		* - Male Only		

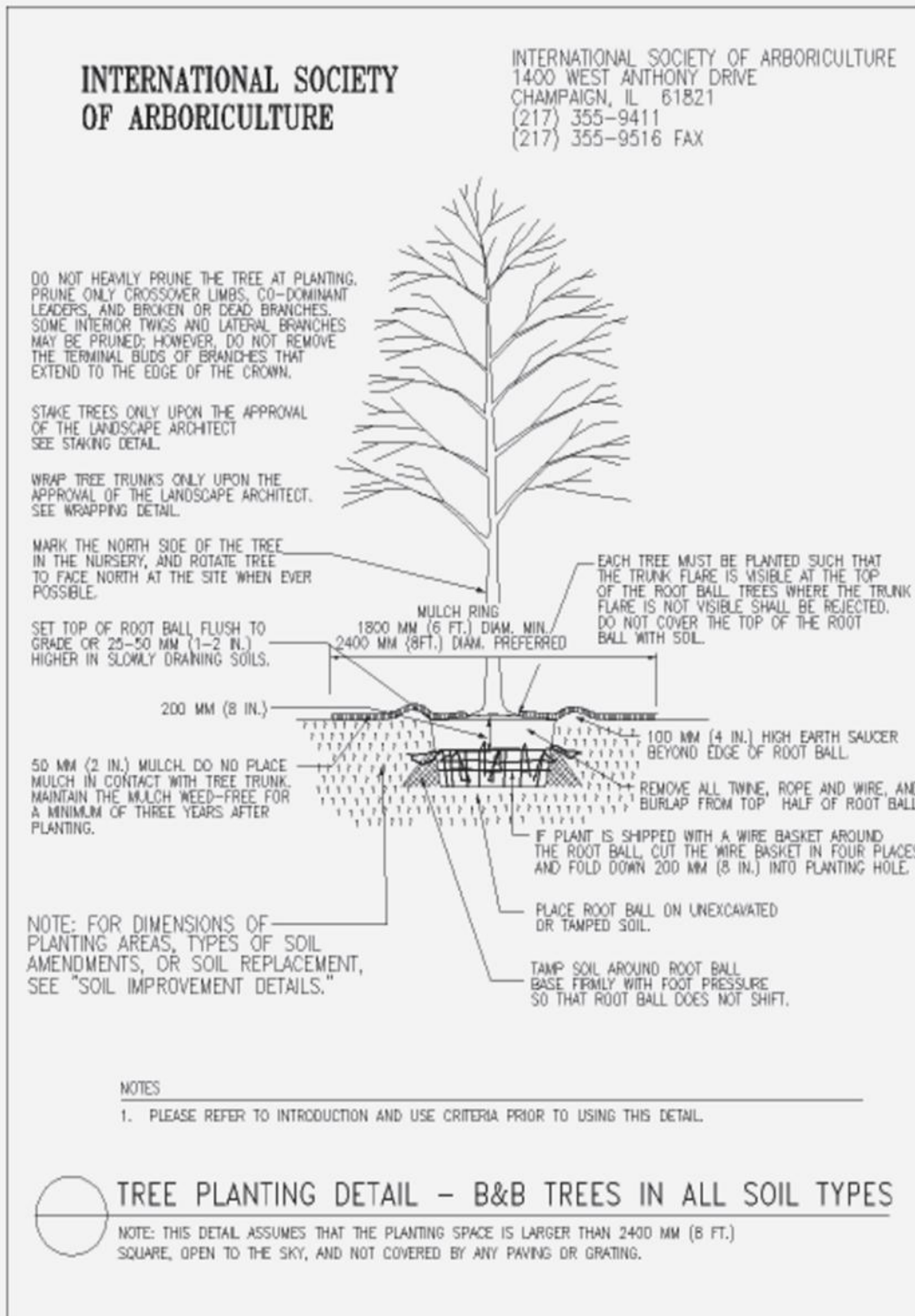
Appendix B: Additional Comments on Species

SPECIES	COMMENTS	SPECIES	COMMENTS
ALANTHUS	NOT APPROVED	LILAC-SHRUB	Parks Only
ALDER-SPP		LILAC-TREE	Improved varieties, tree form only
AMERICAN HORNBEAM		LINDEN-AMERICAN	
AMERICAN REDBUD		LINDEN-LITTLELEAF	
AMUR MAACKIA		LINDEN-SILVER	
APPLE-CRAB SPP	Apple Scab resistant varieties only	LINDEN-SPP	
APPLE-EDIBLE	Parks Only	LONDON PLANETREE	Prefer 'Exclamation!', 'Bloodgood' not allowed
APRICOT	NOT APPROVED	MAGNOLIA-CUCUMBER	
ARBOR VITAE	Parks only	MAGNOLIA-SAUCCER	Scale resistant varieties only
ASH-BLUE	NOT APPROVED	MAGNOLIA-SHRUB	Star Magnolia or similar Magnolia pruned to tree form
ASH-GREEN	NOT APPROVED	MAPLE-AMUR	Parks only unless pruned to tree form
ASH-WHITE	NOT APPROVED	MAPLE-AUTUMN BLAZE	Or other similar Acer x freemannii
ASPEN	Improved varieties only	MAPLE-BLACK	
BALDCYPRESS	Prefer 'Shawnee Brave'	MAPLE-HEDGE	
BEECH-AMERICAN		MAPLE-JAPANESE	Small growing space only
BEECH-SPP	Prefer 'Tricolor' or 'Riversii'	MAPLE-MIYABEI	Prefer 'State Street'
BIRCH-RIVER	Prefer Single stem only	MAPLE-NORWAY	NOT APPROVED
BIRCH-SPP	Sweet Birch, Yellow Birch, or other new introductions	MAPLE-PAPERBARK	
BIRCH-WHITE	Bronze Birch Borer resistant only, prefer 'Whitespire'	MAPLE-RED	Improved varieties only
BLACK LOCUST	Improved varieties only, prefer 'Purple Robe'	MAPLE-SILVER	NOT APPROVED
BLACKGUM		MAPLE-SUGAR	Prefer 'Green Mountain'
BOXELDER	NOT APPROVED	MOUNTAIN ASH	Improved varieties only
BUCKEYE-OHIO		MOUNTAIN ASH-EUROPEAN	Improved varieties only
BUCKEYE-RED	Prefer 'Ft. McNair' or Bottlebush	MULBERRY-SPP	NOT APPROVED
BUCKEYE-YELLOW		OAK-BURR	
BUCKTHORN	NOT APPROVED	OAK-CHESTNUT	
BURNING BUSH	NOT APPROVED	OAK-CHINKQUAPIN	
CAROLINA SILVERBELL	Protected sites only	OAK-ENGLISH	
CATALPA		OAK-PIN	
CHERRY-BLACK	NOT APPROVED	OAK-RED	
CHERRY-PURPLE LEAF		OAK-SWAMP WHITE	
CHERRY-SPP	Ornamental, Black Knot resistant varieties only	OAK-WHITE	
COTTONWOOD	NOT APPROVED	OTHER	Open for new introductions
DAWN REDWOOD		PAGODATREE	
DOGWOOD-SPP	Hardy varieties only	PEACH	Parks only
DOUGLAS FIR	Parks only	PEAR-CALLERY	NOT APPROVED
EASTERN REDCEDAR	Parks only	PEAR-EDIBLE	Parks Only
ELM-AMERICAN	NOT APPROVED	PERSIAN IRONWOOD	Medium growing space only
ELM-HYBRID	Hardy varieties only	PERSIMMON	American variety preferred (Diospyros virginiana)
ELM-RED	NOT APPROVED	PINE-AUSTRIAN	Parks Only
ELM-SIBERIAN	NOT APPROVED	PINE-SCOTCH	Parks only
ELM-SPP	New cultivar introductions	PINE-WHITE	Parks only
EUONYMUS	Eastern Wahoo ONLY no non-native varieties	PLUM-SPP	Parks Only
FIR-SPP	Parks only	PUSSYWILLOW	Parks only
FRINGETREE		ROSE OF SHARON	
GINKGO	Male only	SASSAFRAS	
GOLDEN RAINTREE		SERVICEBERRY-SPP	Prefer 'Autumn Brilliance'
HACKBERRY		SEVENTH SON FLOWER	
HARDY RUBBER TREE		SHRUB-SPP	Parks only, open for new introductions
HAWTHORN-SPP	Thornless varieties only	SMOKETREE	American variety preferred, small growing space only
HICKORY-BITTERNUT		SPRUCE-BLUE	Parks only
HICKORY-SHAGBARK		SPRUCE-NORWAY	Parks only
HONEYLOCUST	Prefer 'shademaster' or 'inermis'	SPRUCE-SPP	Parks only
HONEYSUCKLE	NOT APPROVED	SUMAC	Parks only
HORNBEAM-EUROPEAN		SWEETGUM	Prefer 'Happidaze'
HORSECHESTNUT		SYCAMORE	In natural areas only, London Planetree preferred
HYDRANGEA-PEGGEE		TULIPTREE	
IRONWOOD		VIBURNUM	Tree form only
JUNIPER-COMMON	Parks Only	WALNUT-BLACK	NOT APPROVED
KATSURA		WILLOW-SPP	NOT APPROVED
KENTUCKY COFFEETREE	Fruitless varieties only	YELLOWWOOD	
LARCH		YEW	Parks Only
		ZELKOVA	Prefer 'Green Vase'

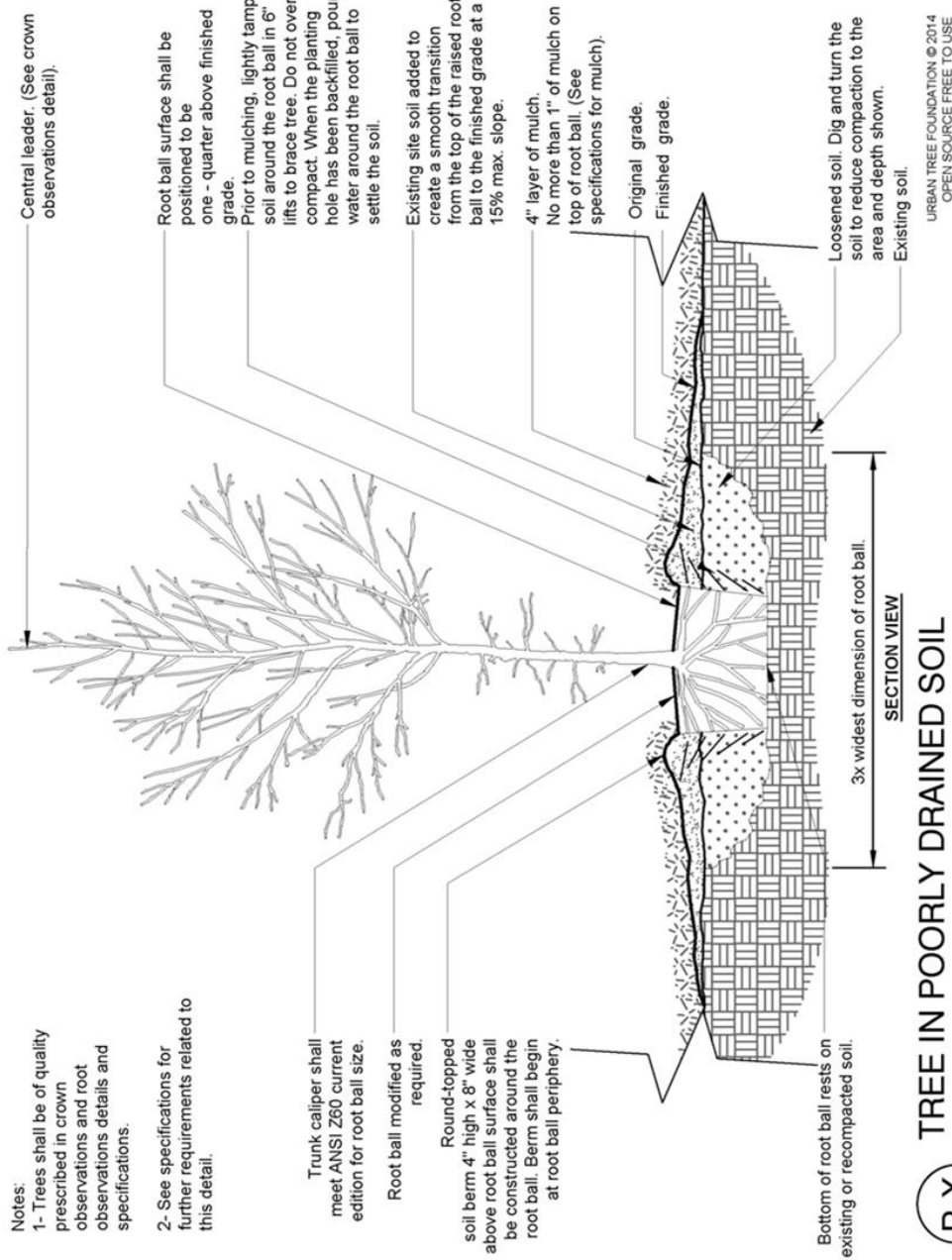
Appendix C: Species Substitutions

Species	Planting Time	Acceptable Substitutes
Alder, Black/Speckled	Spring	River Birch, Planetree
Amur Maackia	Spring	Yellowwood, Shingle Oak
Baldcypress	Spring	Larch, Dawn Redwood
Beech, European	Spring	Red Oak, Buckeye
Birch, River (Multi Stem)	Spring	Alder, Swamp White Oak
Birch, White	Spring	River Birch, Alder
Black Locust (Purple Robe)	Any	Honeylocust, Kentucky Coffeetree
Blackgum	Spring	Sweetgum, Dogwood
Buckeye, Ohio (Autumn Splendor)	Any	Horsechestnut, Catalpa
Buckeye, Red	Spring	Dogwood, Hawthorn
Buckeye, Yellow	Spring	Planetree, Sweetgum
Catalpa	Any	Kentucky Coffeetree, Tuliptree
Cherry, Sargent	Spring	Red Buckeye, Tree Lilac
Chestnut, Chinese	Spring	Turkish Hazelnut, Persimmon
Crabapple (Larger)	Any	Tree Lilac, Hawthorn
Dawn Redwood	Spring	Baldcypress, Larch
Dogwood, Cornelian	Spring	Tree Lilac, Hawthorn
Dogwood, Pagoda	Spring	Sargent Cherry, Smoketree
Douglas Fir	Spring	Concolor Fir, Spruce
Elm, Hybrid (Larger)	Any	Hackberry, Hardy Rubbertree
Fir, Concolor	Spring	Douglas Fir, Spruce
Ginkgo (Standard)	Any	Tuliptree, Catalpa
Golden Raintree	Spring	Katsura, Magnolia
Hackberry, Common	Any	Hybrid Elm, Hardy Rubbertree
Hardy Rubber Tree	Any	Tuliptree, Zelkova
Hawthorn, 'Inermis'	Any	Crab Apple, Dogwood
Hawthorn, Winterking	Any	Tree Lilac, Smoketree
Hazelnut, Turkish	Spring	Persimmon, Catalpa
Hickory, Bitternut	Spring	Oak spp, Beech spp
Hickory, Shagbark	Spring	Oak spp, Beech spp
Hornbeam, American	Spring	Ironwood, Hawthorn
Hornbeam, European (Columnar)	Spring	English Oak (columnar)
Horsechestnut (Baumani)	Any	Buckeye, Catalpa
Ironwood	Spring	American Hornbeam, Hawthorn
Katsura	Spring	Magnolia, Seventh Son Flower
Kentucky Coffeetree	Any	Honeylocust, Black Locust
Larch	Spring	Baldcypress, Dawn Redwood
Lilac, Japanese Ivory Silk	Any	Hawthorn, Sargent Cherry
Linden, Greenspire	Any	Kentucky Coffeetree, Hybrid Elm
Linden, Redmond	Any	Catalpa, Hackberry
Locust, Skyline	Any	Kentucky Coffeetree, Black locust
London Planetree	Spring	Sweetgum, Blackgum
Magnolia, Cucumber	Spring	Yellow Buckeye, Catalpa
Magnolia, Saucer	Spring	Persian Ironwood, Katsura
Magnolia, Star	Spring	Sargent Cherry, Smoketree
Maple, Autumn Blaze	Any	Black Maple, Shantung Maple
Maple, Black	Any	Shantung Maple, Autumn Blaze
Maple, Paperbark	Spring	Triflorum Maple, Tree Lilac
Maple, Shantung	Any	Sugar Maple, Miyabei Maple
Maple, Sugar	Any	Autumn Blaze, Shantung Maple
Maple, Triflorum	Spring	Paperbark Maple, Tree Lilac
Mountain Ash	Spring	Black Locust, Hawthorn
Oak, Burr	Spring	Shingle Oak, Swamp White Oak
Oak, English (Columnar)	Any	European Hornbeam
Oak, English (Standard)	Any	White Oak, Burr Oak
Oak, Red	Spring	Black Oak, Chinquapin Oak
Oak, Shingle	Spring	Chinquapin Oak, English Oak
Oak, Swamp White	Spring	London Planetree, Burr Oak
Oak, White	Spring	Burr Oak, English Oak
Oak, Chinquapin	Spring	Shingle Oak, Red Oak
Persian Ironwood	Spring	Seventh Son Flower, Katsura
Persimmon	Spring	Turkish Hazelnut, Zelkova
Pine, Limber	Spring	Spruce, Concolor Fir
Pine, Red	Spring	Douglas Fir, Eastern Redcedar
Poplar, Hybrid	Any	London Planetree, Baldcypress
Redbud	Any	Serviceberry, Hawthorn
Redcedar, Eastern	Spring	Spruce, Douglas Fir
Serviceberry	Any	Redbud, Tree Lilac
Seventh Son Flower	Spring	Persian Ironwood, Katsura
Smoketree	Spring	Magnolia, Seventh Son Flower
Sourwood	Spring	Blackgum, Sweetgum
Spruce, Black Hills	Spring	Eastern Redcedar, Concolor Fir
Spruce, Blue	Spring	Eastern Redcedar, Douglas Fir
Spruce, Norway	Spring	Eastern Redcedar, Concolor Fir
Spruce, Serbian	Spring	Eastern Redcedar, Douglas Fir
Sweetgum	Spring	Yellow Buckeye, Larch
Tuliptree	Any	Zelkova, Ginkgo
Yellowwood	Spring	Amur Maackia, Shingle Oak
Zelkova	Spring	Tuliptree, Ginkgo

Appendix D: Balled and Burlapped Planting Detail

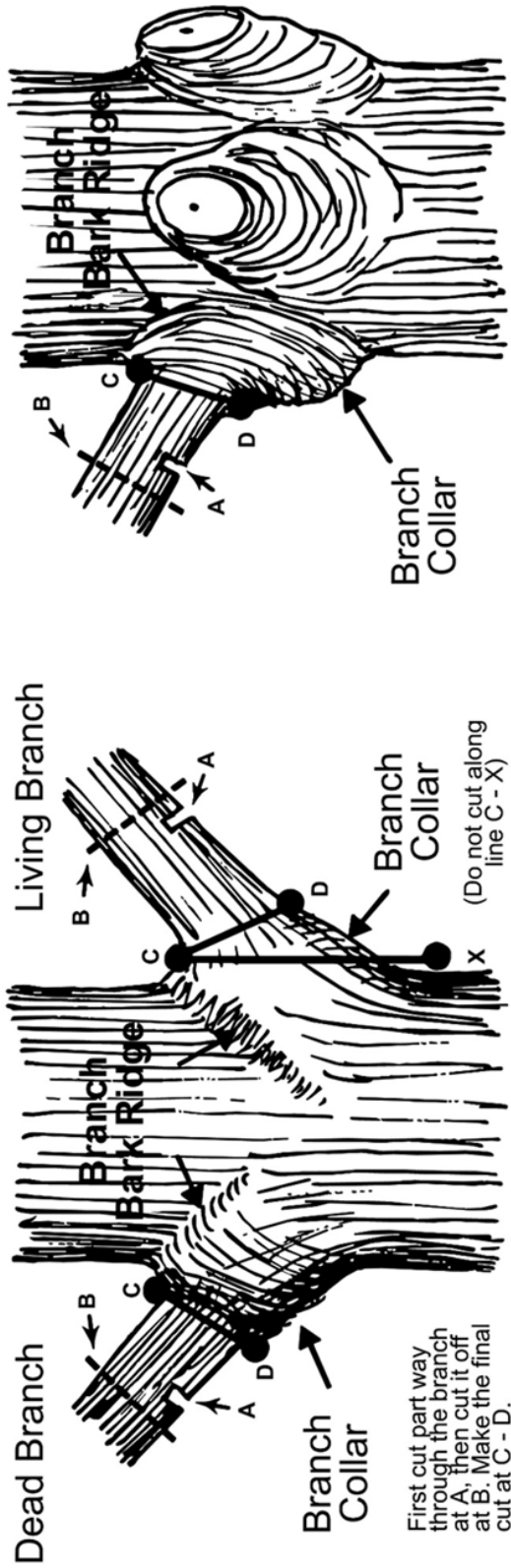


Appendix E: Containerized Planting Detail



Appendix F: Tree Pruning Detail

Proper Pruning Principles

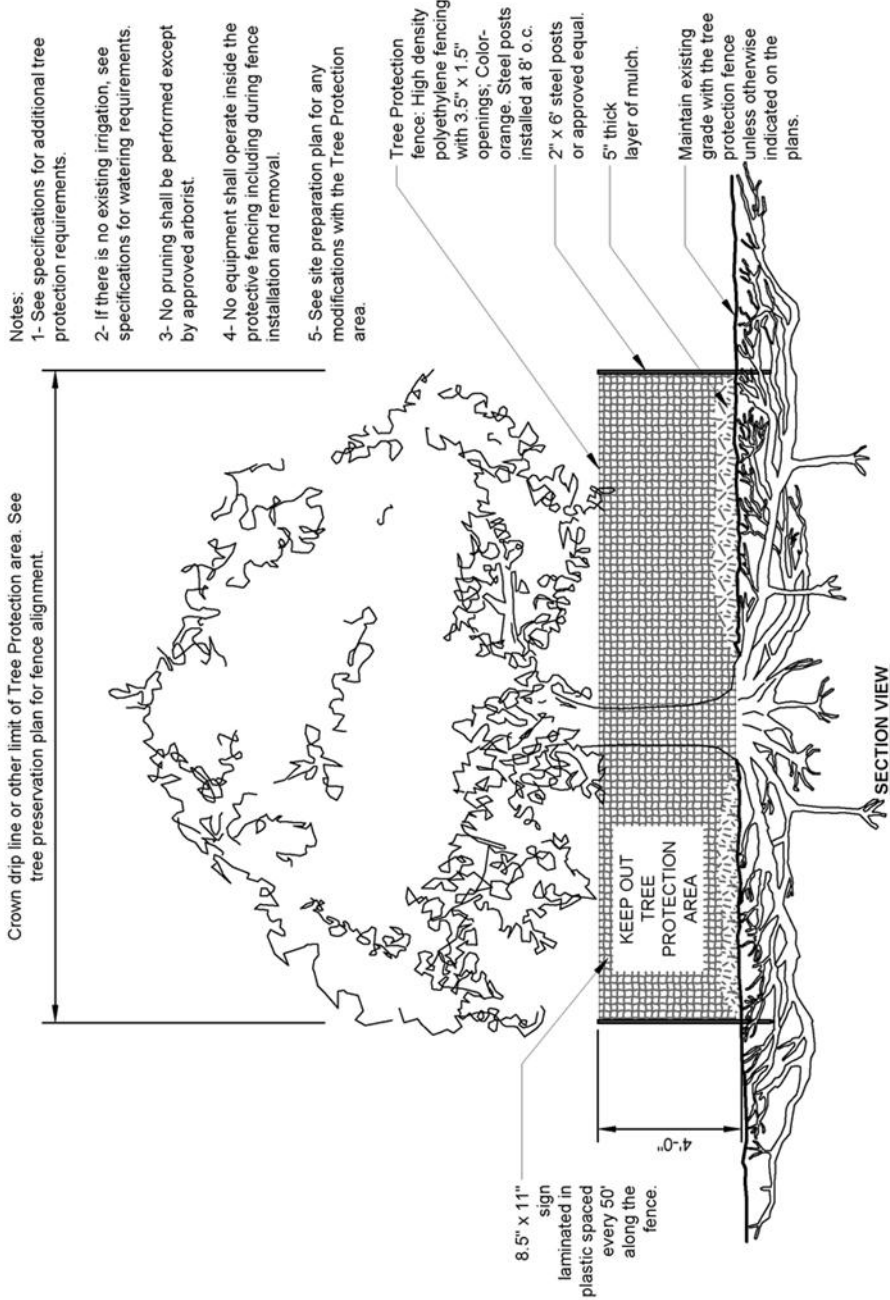


Conifers

Hardwoods



Appendix G: Tree Protection Detail



S-X TREE PROTECTION

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Appendix H: Sample Tree Risk Policy and Procedures, ISA Tree Risk Assessment Form (TRAQ Level 2-Basic)

SAMPLE Tree Risk Management Policies and Procedures

Tree Risk Management Policy

It is the intent of (municipality) to minimize risks posed from trees to people and property on its streets, right of ways, properties and facilities. Therefore, potential risks from trees owned and managed by (municipality) will be periodically identified by conducting tree risk assessments as defined by current professional standards and best management practices. The purpose of the assessments is to ensure that the (municipality) has, at the time of the assessments, made reasonable efforts to identify potential elevated risk and high-risk trees that are in their care.

The urban forest of (municipality) provides environmental, aesthetic and societal benefits to the community. The (municipality), in its role as property manager, is responsible for balancing the many benefits of the urban forest against the potential risks that trees may pose to people and property. To properly protect the (municipality) and its residents from potential risk, this policy has been created defining the intent to manage these risks.

Potential risks identified in the risk assessments will be prioritized, and risk mitigation options will be identified for the (municipality) to create and implement a management plan to mitigate those risks. (municipality) will make reasonable risk mitigation decisions based on the risk levels found, level of acceptable risk, budget constraints, and other factors that affect work priorities.

Tree Risk Management Procedures

To manage potential risk in their tree population, (municipality) will implement the Tree Risk Management Policy by utilizing the following Tree Risk Management Procedures:

Identification of Potential Tree Risk

1. The (Director of ---) will periodically have a Level 1 Limited Visual Tree Risk Assessment conducted, as defined in the International Society of Arboriculture's (ISA) *Best Management Practices: Tree Risk Assessment* and *ANSI A300 Part 9: Risk Assessment*, on all trees greater than 10 inches diameter breast height (dbh) within maintained municipal right of ways and municipal owned properties. Trees or parts of trees in unmaintained areas that could fall onto streets, buildings, structures, parking lots, drives, maintained municipal areas and trail systems will also be a part of the assessment. Dead or broken limbs under 3" in diameter will not be a part of the assessment.
2. The Level 1 Assessment should be conducted:
 - a. During the periodic (municipality)-wide tree inventory that details the species, size, and condition of all trees on (municipality) owned land, including a basic level of risk posed by each tree. The trees listed as being in elevated risk categories during the inventory will be audited by qualified (municipality) staff and/or a forestry consultant who should inspect these trees and identify trees potentially posing an unacceptable level of risk. Such trees

identified should either be scheduled for a more detailed risk assessment (Level 2 or 3), or be mitigated, either by pruning, cabling, bracing, removal, or other treatment.

- b. When ISA Tree Risk Assessment Qualified (TRAQ) arborists are inspecting (municipality)'s urban forest to identify those trees having an imminent or a probable likelihood for structural failure, i.e. trees or limbs breaking and falling.
 - c. In the aftermath of extreme weather events. Every tree, no matter how healthy, can fail from high wind velocity, excessive loads from snow or ice, and other factors such as lightning strikes and soil saturation. Typical weather for northern Illinois can cause tree failures or tree part failures for trees which have preexisting defects. Extreme weather events can cause the failure of healthy trees with no defects.
 - d. Upon notification of a concern about a potentially high-risk tree from a resident, a business, or from staff, (municipality) will have qualified staff and/or the urban forestry consultant perform a Level 1 limited visual inspection within (14) business days of the notification. If a Level 2 or Level 3 Risk Assessment is required based on that inspection, it should be performed within an additional (14) business days.
3. (municipality) staff may, in the course of their duties, inspect for possible tree defects and report any trees of concern to their supervisor.
 4. The purpose of the Level 1 Assessment and/or tree inventory is to ensure that (municipality) has, at the time of the assessment, made reasonable efforts to identify potential elevated risk and high-risk trees that are in their care.
 5. Trees found with significant defects will be GPS or otherwise located with a brief description of the defect(s) found.
 6. Trees will be considered for a higher level of assessment where there is a strong desire to keep the tree due to its high ecological quality, historical importance, or location value, but more data is required to determine the severity of the defect. These will be GPS located with species, size, description of defect(s) and an ISA Level 2 Basic Assessment or Level 3 Advanced Assessment recommendation. These trees will be considered for these more detailed levels of inspection that will use specialized tools and equipment to adequately assess the severity of risk.
 7. If conducted, each Level 2 or 3 Assessment will follow (ISA) *Best Management Practices: Tree Risk Assessment* and *ANSI A300 Part 9: Risk Assessment* protocols, creating a written report (ISA Form below) producing a *Risk Rating* for the individual tree. This rating is derived using the following ISA BMP *Risk Rating Matrices*:

Likelihood of Tree Failure Impacting Target

Likelihood of Failure	Likelihood of Impacting Target			
	Very Low	Low	Medium	High
Imminent	Unlikely	Somewhat Likely	Likely	Very Likely
Probable	Unlikely	Unlikely	Somewhat Likely	Likely
Possible	Unlikely	Unlikely	Unlikely	Somewhat Likely
Improbable	Unlikely	Unlikely	Unlikely	Unlikely

Risk Rating Matrix

Likelihood of Failure and Impact	Consequences			
	Negligible	Minor	Significant	Severe
Very Likely	Low	Moderate	High	Extreme
Likely	Low	Moderate	High	High
Somewhat Likely	Low	Low	Moderate	Moderate
Unlikely	Low	Low	Low	Low

8. A Level 2 Tree Risk Assessment Inspection will:
 - a) Determine targets and target zone.
 - b) Thoroughly inspect the tree visually from ground level.
 - c) Review site history, conditions and species failure profile.
 - d) Assess potential tree loads.
 - e) Assess general tree health.
 - f) Record observations of site conditions, defects, and outward signs of possible internal defects and response growth.

9. A Level 3 Advanced Assessment Inspection will utilize one or more specialized techniques:
 - a) Aerial inspection using drones, climbers, or lifts.
 - b) Decay testing using specialized equipment (sonic tomograph/resistance drill).
 - c) Detailed target analysis of property values and occupation rates.
 - d) Detailed site evaluation.
 - e) Tree health assessment.
 - f) Root and root collar inspection and analysis.
 - g) Wind load testing/analysis.
 - h) Measurement of changes in trunk lean.

Mitigation of Potential Tree Risk

Based on the Level 1, 2 and 3 Assessment findings, (municipality) will then create prioritized risk mitigation options that may be utilized to reduce or eliminate those risks.

1. Level 1 Limited Visual Assessment
 - a. If a Level 1 Assessment finds a tree with an *imminent* risk of failure and there is potential for injury to staff or the public, the (municipality) will restrict access to the target zone of the tree or tree part and *act as soon as possible* (one to two days) to mitigate or eliminate the risk through pruning, removal, or other means.
 - b. Other potential elevated levels of tree risk found in the Level 1 Assessment may require pruning, cabling, bracing, cabling, removal, or other means *as soon as practical* (when work schedule or pruning allows) after the assessment.

2. Level 2 Basic Assessments and Level 3 Advanced Assessments
 - a. If Level 2 or Level 3 Assessments find any trees with an “Extreme” Risk Rating, the (municipality) will restrict access to the target zone of the tree or tree part and act *as soon as possible* to mitigate the risk through pruning, removal or other means.
 - b. If the Level 2 and 3 Assessments find any trees with a “High” Risk Rating, the (municipality) will implement risk mitigation measures through pruning, cabling, bracing, removal, or other means *as soon as practical* after the assessment.
 - c. “Moderate” Risk Rated trees may be mitigated and/or retained and monitored. Mitigation measures may be scheduled *as budgets and time allow*. These trees may be monitored over months or even years.
 - d. “Low” Risk Rated trees may not require any mitigation and should be retained (if desired) and monitored.
3. Prioritized Risk Mitigation Plan
 - a. All trees determined to need risk mitigating actions should be documented in writing by (municipality) staff and/or the urban forestry consultant. This documentation shall include the date the assessment was performed, the species, size, and condition of the tree, and a brief narrative detailing which parts of the tree are likely to fail, the likelihood of failure, the likelihood of impacting a target, the consequences of tree or tree part failure, and the overall tree risk rating, per the ISA’s TRAQ system of risk assessment.
 - b. The Director of ---, in consultation with other (municipality) staff, the Board of Commissioners, and/or a forestry consultant, will determine appropriate mitigation measures (such as removal, pruning, structural support, site modification, etc.) and will create a prioritized risk mitigation plan. Implementation of the plan will be based on the risk levels found, level of acceptable risk, budget constraints, and other factors that affect work priorities.

ISA Basic Tree Risk Assessment Form

Client _____ Date _____ Time _____
 Address /Tree location _____ Tree no. _____ Sheet _____ of _____
 Tree species _____ dbh _____ Height _____ Crown spread dia. _____
 Assessor(s) _____ Time frame _____ Tools used _____

Target Assessment

Target number	Target description	Target zone			Occupancy rate 1 – rare 2 – occasional 3 – frequent 4 – constant	Practical to move target?	Restriction practical?
		Target within drip line	Target within 1 x Ht.	Target within 1.5 x Ht.			
1							
2							
3							
4							

Site Factors

History of failures _____ Topography Flat Slope _____ % Aspect _____
 Site changes None Grade change Site clearing Changed soil hydrology Root cuts Describe _____
 Soil conditions Limited volume Saturated Shallow Compacted Pavement over roots _____ % Describe _____
 Prevailing wind direction _____ Common weather Strong winds Ice Snow Heavy rain Describe _____

Tree Health and Species Profile

Vigor Low Normal High Foliage None (seasonal) None (dead) Normal _____ % Chlorotic _____ % Necrotic _____ %
 Pests _____ Abiotic _____
 Species failure profile Branches Trunk Roots Describe _____

Load Factors

Wind exposure Protected Partial Full Wind funneling _____ Relative crown size Small Medium Large
 Crown density Sparse Normal Dense Interior branches Few Normal Dense Vines/Mistletoe/Moss _____
 Recent or planned change in load factors _____

Tree Defects and Conditions Affecting the Likelihood of Failure

— Crown and Branches —

Unbalanced crown LCR _____ % Cracks _____ Lightning damage
 Dead twigs/branches _____ % overall Max. dia. _____ Codominant _____ Included bark
 Broken/Hangers Number _____ Max. dia. _____ Weak attachments _____ Cavity/Nest hole _____ % circ.
 Over-extended branches Previous branch failures _____ Similar branches present
Pruning history
 Crown cleaned Thinned Raised Dead/Missing bark Cankers/Galls/Burls Sapwood damage/decay
 Reduced Topped Lion-tailed Conks Heartwood decay _____
 Flush cuts Other _____ Response growth _____
 Main concern(s) _____

Load on defect N/A Minor Moderate Significant _____
 Likelihood of failure Improbable Possible Probable Imminent _____

— Trunk —

Dead/Missing bark Abnormal bark texture/color
 Codominant stems Included bark Cracks
 Sapwood damage/decay Cankers/Galls/Burls Sap ooze
 Lightning damage Heartwood decay Conks/Mushrooms
 Cavity/Nest hole _____ % circ. Depth _____ Poor taper
 Lean _____ ° Corrected? _____
 Response growth _____
 Main concern(s) _____

Load on defect N/A Minor Moderate Significant
 Likelihood of failure Improbable Possible Probable Imminent

— Roots and Root Collar —

Collar buried/Not visible Depth _____ Stem girdling
 Dead Decay Conks/Mushrooms
 Ooze Cavity _____ % circ.
 Cracks Cut/Damaged roots Distance from trunk _____
 Root plate lifting Soil weakness

Response growth _____
 Main concern(s) _____

Load on defect N/A Minor Moderate Significant
 Likelihood of failure Improbable Possible Probable Imminent

Risk Categorization																			
Condition number	Tree part	Conditions of concern	Part size	Fall distance	Target number	Target protection	Likelihood								Consequences				Risk rating of part (from Matrix 2)
							Failure				Impact				Failure & Impact (from Matrix 1)				
							Improbable	Possible	Probable	Imminent	Very low	Low	Medium	High	Unlikely	Somewhat	Likely	Very likely	
1																			
2																			
3																			
4																			

Matrix 1. Likelihood matrix.

Likelihood of Failure	Likelihood of Impacting Target			
	Very low	Low	Medium	High
Imminent	Unlikely	Somewhat likely	Likely	Very likely
Probable	Unlikely	Unlikely	Somewhat likely	Likely
Possible	Unlikely	Unlikely	Unlikely	Somewhat likely
Improbable	Unlikely	Unlikely	Unlikely	Unlikely

Matrix 2. Risk rating matrix.

Likelihood of Failure & Impact	Consequences of Failure			
	Negligible	Minor	Significant	Severe
Very likely	Low	Moderate	High	Extreme
Likely	Low	Moderate	High	High
Somewhat likely	Low	Low	Moderate	Moderate
Unlikely	Low	Low	Low	Low



Notes, explanations, descriptions _____

Mitigation options _____ Residual risk _____
 _____ Residual risk _____
 _____ Residual risk _____
 _____ Residual risk _____

Overall tree risk rating Low Moderate High Extreme Work priority 1 2 3 4

Overall residual risk Low Moderate High Extreme Recommended inspection interval _____

Data Final Preliminary Advanced assessment needed No Yes-Type/Reason _____

Inspection limitations None Visibility Access Vines Root collar buried Describe _____

This datasheet was produced by the International Society of Arboriculture (ISA) and is intended for use by Tree Risk Assessment Qualified (TRAQ) arborists – 2013

Appendix I: ANSI Z133.1 Standards – Applies to All Sections

All the ANSI Z133.1 safety standards shall apply to all tree care operations outlined in the Urban Forestry Management Plan. Listed below is a basic overview of the standard, and it is not verbatim. A full text of this manual will be made available to all City employees and contractors involved with tree care operations.

1. All contractors conducting forestry related work for the City shall provide proof of insurance that meets the City's requirements.
2. All tools and equipment utilized during tree care operations, including those not specifically mentioned below, shall be inspected and maintained by qualified personnel in accordance with the manufacturer's care instructions.
3. All staff shall be trained in the proper use, inspection, and maintenance of said equipment.
4. Certified arborists or arborist trainees shall conduct job briefings daily prior to tree care operations of any kind and the information shall be communicated to all workers.
5. All activities performed on any job site for any activity outlined in this Urban Forestry Management Plan shall comply with all applicable OSHA guidelines and standards.
6. Traffic and pedestrian control shall be established around the job site prior to the beginning of tree care operations.
7. Emergency contact information and a safety kit conforming to the ANSI Z308.1 standards shall be made available to all workers. All employees shall have basic instruction on the use of CPR and First Aid.
8. Personal Protective Equipment (PPE) shall be required when there is a reasonable probability of injury or illness on the job site. Such a determination will be made by the Certified Arborist or Arborist Trainee prior to the beginning of tree care operations each day, and PPE shall be made available. PPE shall be well-maintained in accordance with the manufacturer's requirements.
9. Head protection shall conform to ANSI Z89.1, face and eye protection shall conform to ANSI Z87.1, respiratory protection shall comply with ANSI Z88.2, and leg protection shall always be worn when using a chainsaw.
10. Flammable liquids shall be kept a minimum of ten feet from open sources of flame or high heat and shall be stored in approved containers.
11. All City staff and contractors working near electrical hazards shall be qualified to do so and shall be educated in the full ANSI standards for Electrical Hazards and Line Clearance.
12. Vehicles and mobile equipment shall be inspected and maintained by qualified personnel in accordance with the manufacturer's requirements and shall be equipped with all standard safety devices, decals, and instructions, and shall be operated within all federal, state, and local motor vehicle codes and ordinances.

- 13.** Aerial devices shall be inspected and maintained by qualified personnel in accordance with the manufacturer's requirements, and shall be equipped with all standard safety devices, decals, and instructions.
- 14.** Aerial devices shall be stabilized by wheel chocks, outriggers, or stabilizers as necessary for the device, and shall never be used to lift, hoist, or lower logs or equipment unless specifically designed to do so.
- 15.** Aerial devices shall be equipped with fall protection devices and permanent load ratings, both in accordance with ANSI/SIA 92.2 or 92.5, as applicable to the specific aerial device.
- 16.** No aerial device shall be allowed to make contact with electrical conductors, and minimum safe approach distances shall be maintained in accordance with the ANSIZ133.1 Standard.
- 17.** All brush chippers shall be inspected and maintained by qualified personnel in accordance with the manufacturer's requirements, and shall be equipped with all standard safety devices, decals, and instructions.
- 18.** Sprayers and related plant health care equipment shall be inspected and maintained by qualified personnel in accordance with the manufacturer's requirements, and shall be equipped with all standard safety devices, decals, and instructions
- 19.** Sprayer tanks or other similar enclosed spaces shall not be entered unless performed through a confined-space entry plan in accordance with OSHA 1910.46 Requirements, including air-quality testing, training, and PPE.
- 20.** Chain saws and other similar portable power tools shall not be operated unless the manufacturer's safety devices are in proper working order. Such safety devices shall not be removed or modified.
- 21.** A visual hazard assessment, including a root collar inspection, shall be performed by a certified arborist or arborist trainee prior to climbing, entering, or performing work in or on any tree, and a second crew member shall be within visual or voice communication at all times during arboricultural operations that are in excess of 12 feet from the ground surface.
- 22.** All ropes, saddles, carabiners, and other similar climbing equipment shall be: a) approved for use in the tree care industry by the manufacturer, b) have a minimum breaking strength or load capacity of 5,000 lbs., c) be inspected before each use, d) Equipment shall be removed from service when it shows signs of excessive wear or deterioration.
- 23.** All pruning, removal, and rigging operations shall have a designated drop zone where limbs, trunks, and tools can be dropped from aloft without impacting pedestrians or passersby. A visual or verbal communication system between the employee aloft and the employee(s) on the ground shall be established to determine when the employee aloft will safely drop tree parts or tools.
- 24.** Any tree parts which cannot be safely dropped or controlled from aloft shall have a separate rigging line tied to them to help control their fall. The tree shall be inspected for structural stability prior to the establishment of a rigging system in the tree. When trees appear to have defects that could jeopardize the ability to safely use a rigging system to drop or control a limb, an alternate plan shall be implemented.

- 25.** All equipment utilized in rigging shall meet the load ratings for the limb being rigged, and a qualified employee, trained in proper rigging procedure shall determine the rigging procedure and equipment to be utilized. Any equipment which has been damaged or overloaded shall be removed from service.
- 26.** When felling (removing) a tree, a crew leader shall make the determination of what equipment is necessary, and how many crew members are to be directly involved in drop zone operations. A well-established escape route shall be planned for involved workers prior to the beginning of felling operations. Any non-involved workers shall be beyond twice the height of the trunk or tree being removed during felling operations.
- 27.** Notches shall be used on all trees and trunks greater than five inches in diameter during felling operations and should conform to the standards set forth in the ANSIZ133.1 Standard.
- 28.** Loose clothing, ropes, lanyards, and saddles shall not be worn during any tree care activity where the risk of entanglement with tools or machinery is possible, particularly with brush chippers.

Appendix J: Tree Planting Standards (ANSI/ISA BMP)

ANSI Z60.1

1. All root ball and container sizes for all balled and burlapped stock shall conform to the Z60.1 standards for width and depth, such that they encompass enough of the fibrous root system as necessary for the full recovery of the plant upon installation.
2. All bare root stock shall conform to ANSI Z60.1 standards for minimum root spread.
3. All containerized stock shall conform to ANSI Z60.1 standards for plant and container size, as specified by the City, and shall be healthy, vigorous, well-rooted and established in the container in which it is growing. The root system shall reach the sides of the container but shall not have excessive growth encircling the inside of the container.
4. All collected plants (those grown on unmanaged land) shall be so designated and shall be considered to be nursery-grown stock when they have been successfully reestablished in a nursery row and grown under regular nursery cultural practices for a minimum of two growing seasons.
5. The trunk or stem of the plant shall be in the center of the ball or container, with a 10% overall variance in location.
6. The use of digging machines in both the packaging and installation of trees is considered an acceptable nursery practice.

ANSI A300 – Part 6

1. Planting sites and work sites shall be inspected for hazards by the City prior to the beginning of work each day. If portions of the work site are outside of the original scope of work, the controlling authority shall be notified immediately.
2. Location of utilities, obstructions, and other such hazards above and below ground shall be taken into account prior to planting and transplanting operations. These include, but are not limited to, gas, electric, sewer, communication, drainage, and signage.
3. The following shall be taken into consideration prior to transport and planting: Requirements of individual trees, compass orientation of field-grown trees, site feasibility assessments, soil assessment, and drainage assessment.
4. Tools for planting and transplanting shall be properly labelled or purchased for their intended use, and be maintained in accordance with the manufacturer's recommendations
5. The system used to move and store the plant shall minimize desiccation and other damage to the crown, trunk or rootball, and the health and vigor of the plant shall be maintained during these periods.
6. The hole to be dug for all new plantings shall be a minimum of 150% larger than the rootball or container diameter, as deep as the root flare of the tree to be planted, and shall have sides from which soil has been loosened in order to aid in root penetration.

7. For balled and burlapped trees, all rootball supporting materials shall be removed from the upper third of the rootball and removed from the planting hole prior to final backfilling.
8. Prior to planting, container root balls shall be managed by approved methods such as, shaving the root ball, slicing the root ball, and redirecting or removing encircling roots.
9. Backfill shall comprise of either the same soil created when the hole was excavated, or a similarly amended mixture to meet a specific objective and shall be applied in a layered fashion to reduce future settling and prevent air pockets.
10. Mulch shall be applied at a depth of two to four inches, near - but not touching - the trunk of the tree, and extending to the perimeter of the planting.
11. Support systems such as guy-wires or stakes shall not be installed except where needed.

ISA BMP Manual – Tree Planting

1. Timing of planting shall be determined based on the species, and the best professional opinion of the employees or contractors working for the City of Kewanee.
2. All employees and contractors employed by or working for the City of Kewanee shall be familiar with the following types of planting types, and when it is appropriate to use each:
 - A. **Bare-Root:** Field-grown, and dug without soil during the dormant season
 - B. **Ball and Burlap:** Field grown and packaged with a soil ball, using burlap, twine, and a retaining basket of some kind
 - C. **Tree Spade:** Transplanted using a mechanical tree spade to hold the soil ball during transport
 - D. **In-Ground Fabric Bag:** Field grown with the root mass contained in a semi-permeable fabric bag
 - E. **Container Grown:** Grown above ground in containers of various shapes, sizes, and materials
3. Trees packaged with root balls must have their first structural root within two inches of the soil surface. Trees with deeper structural roots will not perform well when transplanted and should be avoided when selecting nursery stock.
4. Trees with root balls shall be handled by the ball, not the stem, to ensure no damage occurs to the root-soil interface or to the stem itself.
5. Trees with leaves shall be transported with a fabric tarp to minimize desiccation and have had their root balls wetted prior to transport.
6. Sites shall be tested for drainage, nutrient levels, and pH prior to planting (or prior to species selection, if possible).
7. Container stock shall be removed from its container, and any encircling roots pruned off prior to planting, and the root ball shaved as necessary.

- 8.** For balled and burlapped trees, encircling roots shall be mitigated prior to planting, wrappings shall be left on until the tree is in the hole; wrapping shall then be removed from the third to fourth of the wire basket and burlap from the top of the ball.
- 9.** As soil is added, wet and tamp each layer down to ensure good moisture and reduction of air bubbles.
- 10.** Do not prune trees at time of planting, unless to remove dead, dying, diseased, or cracked branches, as it may take away from root development to have the tree attempt to heal these above-ground wounds.
- 11.** The use of trunk wrap may be considered in areas with harsh winters, specifically on trees with thin bark, such as London Planetree and certain Maple species.

Appendix K: Tree Pruning Standards (ANSI/ISA BMP)

ANSI A300 - Part 1

1. A designated Arborist or Arborist Trainee shall visually inspect each tree before beginning work. If any condition is observed above and beyond the original scope of work, said condition shall be reported to the controlling authority before any work begins.
2. Pruning cuts which remove a branch at its point of origin shall be made close to the trunk or parent branch without cutting into the branch-bark collar or leaving a stub.
3. Pruning cuts made to reduce the length of a limb or parent stem shall be made at a slight angle relative to the remaining stem and not damage the remaining stem. If pruning to a lateral branch, the lateral should be large enough to assume the terminal role.
4. Final cuts shall be made such that the result is a flat surface, with the adjacent bark firmly attached.
5. Not more than 25% of the foliage shall be removed during an annual growing season, depending on the tree species, size, age, and condition. If more frequent pruning due to utilities, vistas, or health considerations is necessary, removal of the tree should be considered as an alternative to pruning.

ISA BMP Manual

1. All employees or contractors directly involved with the pruning of trees shall be familiar with the following pruning types and how they are to be used in conjunction with one another:
 1. **Pruning to Clean:** Selective removal of dead, diseased, detached, cracked, and broken branches
 2. **Pruning to Thin:** Selective removal of small live branches to reduce crown density
 3. **Pruning to Raise:** Selective removal of branches to provide vertical clearance
 4. **Pruning to Reduce:** Selective removal of branches and stems to decrease the height or spread of a tree or shrub
 5. **Structural Pruning:** Selective removal of live branches and stems to influence the orientation, spacing, growth rate, strength of attachment, and ultimate size of branches and stems
 6. **Pruning to Restore:** Selective removal of branches, sprouts, and stubs from trees and shrubs which have been topped, severely headed, vandalized, lion-tailed, storm damaged, or otherwise damaged
2. Every effort shall be made to time pruning of individual tree species to be done in accordance with best management practices for the tree species in question. All pruning work shall be done so at the discretion of the City of Kewanee and its approved contractors.

Appendix L: Tree Protection (ANSI/ISA BMP)

ANSI A300 – Part 5

1. Tree management plans and specifications for tree management shall be written and administered by a certified arborist qualified in the management of trees and shrubs during site planning, development, and construction. Such activities may include, but are not limited to: demolition, grading, building construction, walkway or roadway construction, excavation, trenching and boring, or other such activity which has the potential to negatively impact trees.
2. The management of trees and shrubs shall be incorporated into the following phases of the site development process:
 - A. Planning
 - B. Design
 - C. Pre-Construction
 - D. Construction
 - E. Landscape
 - F. Post-Construction
3. During the Planning phase, an assessment of tree and shrub resources on the site shall be performed by a certified arborist. The assessment shall identify the species, condition, and size of each tree and shall be incorporated into the site design. Trees to be retained or protected shall appear on site design maps. Trees on neighboring properties that could also be impacted should be considered.
4. During the design phase, a tree management report shall be developed for trees to be conserved on the site, and shall be included in the construction plans and specifications, which may include, but are not limited to:
 - A. Trees to be retained
 - B. Tree and Root Protection Zones (TPZ/RPZ)
 - C. Tree Protection Zone barriers
 - D. Tree Protection plans
 - E. Soil erosion control
 - F. Soil compaction controls
 - G. Staging and storage areas
 - H. Other relevant on-site activities

5. Grading and demolition plans shall include all trees to be retained and removed, as well as the tree protection plans for working around trees to be retained. Plans shall also include equipment routes for avoiding the TPZ. Consequences for non-compliance shall be specified.
6. During the pre-construction phase, all tree protection plans shall be effectively communicated to all parties involved with the site development, and tree protection zone barriers shall be in place prior to the beginning of any construction activities.
7. The TPZ shall be delineated around all trees to be protected during construction, and shall be based on the size, species, and condition of the tree and its root system. Six to 18 times the diameter of the tree is generally considered to be acceptable. Deviations from this diameter may be made at the discretion of a certified arborist. Activities which could damage tree roots or compact soil should be avoided in the TPZ
8. Fencing or other visible barriers to the TPZ shall be installed prior to site clearing, grading, and demolition, and maintained throughout the construction and landscaping phase. When this is not feasible, alternate methods may be considered.
9. During the construction phase, compliance with tree protection plans shall be monitored by a certified arborist, and any damage to tree barriers or trees, or non-compliance shall be reported to the project manager or owner, or other controlling authority.
10. When removing vegetation or pavement during demolition, equipment used adjacent to the TPZ shall be specified to avoid damage to the tree and the surrounding soil, and soil protection measures shall be in place prior to vehicle or heavy traffic in or near the TPZ.
11. Storage or disposal of construction materials or hazardous materials shall not occur in the TPZ.
12. Fill within the TPZ shall not be permitted without mitigation to allow for proper air and water availability to existing roots. If fill cannot be avoided in the TPZ, compaction of fill shall be avoided, and consideration shall be given to a permanent well installation to protect the tree and its roots.
13. During the landscape, irrigation, and lighting phase, levels of compliance shall be documented and reported by a certified arborist. Non-compliance shall be reported to the project manager.
14. During the post-construction phase, a remedial and long-term maintenance plan shall be specified for existing and new landscaping, to ensure success of preservation efforts and newly planted landscaping.
15. Pruning shall be considered to reduce wind sail when necessary. It should not be considered to compensate for root loss.
16. Mulch shall be applied to as much of the tree protection zone as possible, in order to create a favorable soil environment for root recovery after construction activities.

ISA BMP Manual

1. A cost-benefit analysis shall be conducted during the planning phase. In some cases, money may be better invested in tree planting post-construction.

2. The species and age of tree shall be evaluated by a certified arborist, so that trees in good condition with desirable characteristics are preserved, but those in poor condition or with undesirable characteristics are not.
3. A tree inventory and tree management report shall be conducted during the planning phase, and a certified arborist shall work closely with developers to ensure best management practices are being met for both parties.
4. Efforts shall be made to retain groups of trees, such that there is a wind and solar buffer around the highest quality trees if possible.
5. The Critical Root Zone (CRZ) is the area around the tree trunk where roots essential for tree health and stability are located. A Tree Protection Zone (TPZ) is an arborist-defined area around the tree which should include the CRZ, as well as additional area to ensure future stability and growth. The TPZ is subject to the professional opinion of the certified arborist.
6. An attempt shall also be made to preserve native soil for landscape planting as native soil with horizons is preferred over fill or black dirt.
7. If a sufficient TPZ cannot be established, a 6-12" layer of hardwood mulch, 3/4-inch plywood mat over a four-inch layer of hardwood mulch, or other such measures shall be temporarily installed over the CRZ to prevent root and soil compaction.
8. Trunk protection shall be installed on trees very close to construction activities, and should consist of 2x4 or 2x6 planks, strapped snugly to the tree trunk with wire or other strapping, preferably with a closed-cell foam between the trunk and the planks.
9. When roots over one inch cannot be avoided, they shall be pruned, not left torn or crushed. Acceptable methods of pruning are:
 - A. Excavation using high pressure air tools, pressurized water, or hand tools, followed by selective root cutting
 - B. Cutting through the soil along a predetermined line with a tool designed to cut roots.
 - C. Mechanically excavating the soil and selectively pruning remaining roots.
10. Wells, tree islands, retaining walls, and other such structures or strategies may be considered as alternatives to any cut/fill work in the CRZ or TPZ.
11. Monitoring shall take place during construction and post-construction phases, and any non-compliance should be reported to the proper controlling authority right away, so that timely remediation or mitigation efforts may be undertaken.

Appendix M: Critical Risk Trees

The following table is of Critical Risk Trees found in the inventory that should be remediated immediately if they have not been taken care of already.

TREE ID	PARK NAME	ADDRESS	STREET	SITE	DBH	COMMON NAME	CONDITION	ARBORIST RECOMMENDATION	REC REASON 1	REC REASON 2	RISK LEVEL	COMMENTS
4603	CHAUTAQUA PARK	<Null>	<Null>	<Null>	55	MULBERRY-SPP	BELOW AVG (ANY)	REMOVE-PRIORITY	WOUNDS-TRUNK	WOUNDS-CROWN	CRITICAL	14" trunk split open
4304	FRANCIS PARK	<Null>	<Null>	<Null>	55	HACKBERRY-COMMON	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	ROT-HEARTWOOD	CRITICAL	<Null>
4164	FRANCIS PARK	<Null>	<Null>	<Null>	49	OAK-BURR	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	DECAY COLUMN	CRITICAL	marked with "x"
4145	FRANCIS PARK	<Null>	<Null>	<Null>	47	OSAGE ORANGE	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	<Null>	CRITICAL	<Null>
3559	MCKINLEY PARK	<Null>	<Null>	<Null>	44	SYCAMORE	BELOW AVG (ANY)	PRUNE-PRIORITY	HANGER	<Null>	CRITICAL	6" diameter branch in top of tree, hung up
697	<Null>	616	S GROVE ST	F1	41	LINDEN-AMERICAN	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	STORM DAMAGE	CRITICAL	<Null>
3591	KEWANEE CEMETERY	<Null>	<Null>	<Null>	40	MAPLE-NORWAY	BELOW AVG (ANY)	REMOVE-PRIORITY	DECAY COLUMN	STORM DAMAGE	CRITICAL	<Null>
3644	LIBERTY PARK	<Null>	<Null>	<Null>	39	MAPLE-NORWAY	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	DECAY COLUMN	CRITICAL	<Null>
2496	BAKER PARK & GOLF COURSE	<Null>	<Null>	<Null>	38	HONEYLOCUST	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	ROT-HEARTWOOD	CRITICAL	<Null>
333	<Null>	139	W MCCLURE ST	F1	37	BLACK LOCUST	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	WOUNDS-TRUNK	CRITICAL	<Null>
5031	PLEASANT VIEW CEMETERY	<Null>	<Null>	<Null>	37	MAPLE-NORWAY	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	DECAY COLUMN	CRITICAL	<Null>
4154	FRANCIS PARK	<Null>	<Null>	<Null>	36	OAK-BURR	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	INCLUDED BARK	CRITICAL	marked with "x"
1991	<Null>	626	W 4TH ST	F1	35	MAPLE-SUGAR	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	STORM DAMAGE	CRITICAL	hardscape damage
3563	ST MARY'S CEMETERY	<Null>	<Null>	<Null>	34	EASTERN REDCEDAR	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	ROT-HEARTWOOD	CRITICAL	<Null>
4997	PLEASANT VIEW CEMETERY	<Null>	<Null>	<Null>	33	MAPLE-NORWAY	BELOW AVG (ANY)	PRUNE-PRIORITY	WOUNDS-CROWN	STORM DAMAGE	CRITICAL	large splitting branch
4609	WETHERSFIELD CEMETERY	<Null>	<Null>	<Null>	33	ARBOR VITAE	BELOW AVG (ANY)	REMOVE-PRIORITY	WOUNDS-TRUNK	POOR FORM	CRITICAL	memorial clearance
2565	BAKER PARK & GOLF COURSE	<Null>	<Null>	<Null>	30	BLACK LOCUST	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	WOUNDS-TRUNK	CRITICAL	<Null>
931	<Null>	503	W CENTRAL BLVD	L1	26	MAPLE-SUGAR	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	<Null>	CRITICAL	<Null>
3516	VETERANS PARK	<Null>	<Null>	<Null>	25	CHERRY-BLACK	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	<Null>	CRITICAL	<Null>
5045	PLEASANT VIEW CEMETERY	<Null>	<Null>	<Null>	24	MAPLE-NORWAY	BELOW AVG (ANY)	REMOVE-PRIORITY	DECAY COLUMN	WOUNDS-TRUNK	CRITICAL	<Null>
436	<Null>	236	W CHURCH ST	F1	22	MAPLE-SUGAR	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	WOUNDS-TRUNK	CRITICAL	<Null>
1146	<Null>	1024	W PROSPECT ST	F1	20	LINDEN-AMERICAN	BELOW AVG (ANY)	PRUNE-PRIORITY	HANGER	STORM DAMAGE	CRITICAL	consider removal
4642	WETHERSFIELD CEMETERY	<Null>	<Null>	<Null>	20	EASTERN REDCEDAR	BELOW AVG (ANY)	REMOVE-PRIORITY	WOUNDS-TRUNK	DECAY COLUMN	CRITICAL	<Null>
3030	<Null>	546	DWIGHT ST	F2	19	MAPLE-FREEMAN	BELOW AVG (ANY)	PRUNE-PRIORITY	WEAK TRUNK UNION	INCLUDED BARK	CRITICAL	<Null>
2517	BAKER PARK & GOLF COURSE	<Null>	<Null>	<Null>	17	MAPLE-SUGAR	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	ROOTS-COMPACTED	CRITICAL	<Null>
3949	BAKER PARK & GOLF COURSE	<Null>	<Null>	<Null>	46	ELM-SIBERIAN	VERY POOR / DEAD (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	WOUNDS-CROWN	CRITICAL	<Null>
1842	<Null>	1321	JUNE ST	F3	39	CHERRY-BLACK	VERY POOR / DEAD (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	BASAL ROT	CRITICAL	<Null>
3818	BAKER PARK & GOLF COURSE	<Null>	<Null>	<Null>	18	KENTUCKY COFFEETREE	VERY POOR / DEAD (ANY)	REMOVE-PRIORITY	WOUNDS-CROWN	WEAK TRUNK UNION	CRITICAL	<Null>

TOWN OF CICERO URBAN FORESTRY MANAGEMENT PLAN



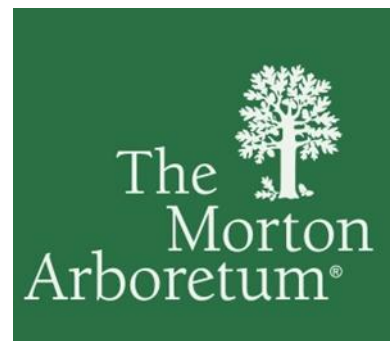
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SECTION 1: INTRODUCTION

Purpose of the Plan

The purpose of this Urban Forestry Management Plan is to outline goals, budgets, and arboricultural best management practices for the management of the urban forest for the Town of Cicero. Implementing this plan will increase canopy cover and maximize the benefits trees provide while minimizing costs. This plan creates a program to manage the urban forest for the greatest public good in a manner that is both financially and programmatically sustainable, while maintaining flexibility for future adaptive management.

Benefits of the Urban Forest

The trees in the Town of Cicero are an asset that should be preserved, protected and cared for as a part of the Town's critical infrastructure. The preservation, protection and enhancement of the urban forest ensures that trees are properly planted and maintained within the Town so that trees can enhance the quality of life for its residents. Municipal trees provide collective benefits that extend through the entire Town of Cicero and surrounding communities. Benefits from the urban forest include:

Energy Savings: When temperatures are warm, trees create cooler temperatures in the immediate environment by intercepting sunlight (creating shade) and from the transportational cooling of water being released from foliage into the atmosphere. These cooling outcomes reduce a community's urban heat island effect and cause air conditioners to work less, reducing the amount of energy used. When temperatures are cold, winter winds can cause homes to lose heat; trees can act as windbreaks, causing heating systems to use less natural gas and electricity.

Carbon Dioxide (CO₂): The amount of CO₂ which is put into the atmosphere each year has a direct correlation with global climate change. Trees uptake CO₂ and act as carbon sinks, removing it from the atmosphere, putting carbon into long-term storage in woody tissues, helping to mitigate the greenhouse gas effect.

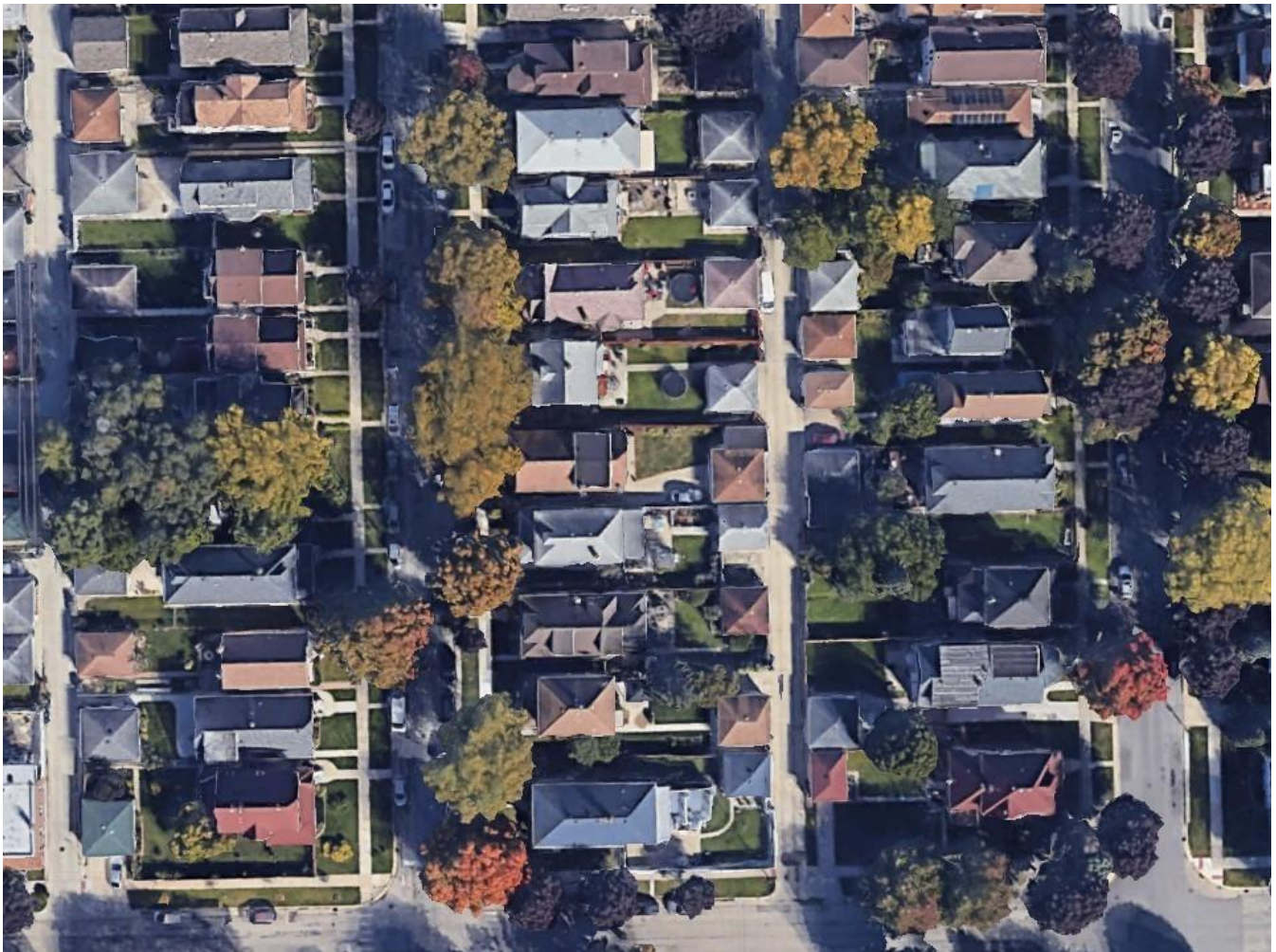
Air Quality: Industrial processes and vehicle emissions put pollutants into our air. Trees absorb these compounds with their leaves and other tissues, removing them from the atmosphere. Reductions in pollutants result in overall better health, reducing the cost of healthcare to society, and improving quality of life for residents.

Stormwater: The cost of delivering fresh water to homes, as well as removing and treating wastewater and stormwater is considerable. Trees take water from the soil and put it back into the atmosphere through the process of transpiration. More trees mean less flooding, and less strain on stormwater infrastructure. Tree canopies slow rainfall's effects on flooding by intercepting it with leaves and branches, delaying how quickly rainfall can become floodwater.

Aesthetic/Economic: Up to 15% of the value of a property can be attributed to its trees and other landscaping. Tree lined streets are much more appealing to homeowners, customers, and businesses, resulting in increased property values, improving commercial district buyer traffic and increased revenues.

Quality of Life: Areas with trees have lower crime rates, have higher levels of community interaction, improve mental and physical health and healing for residents, provide important habitat for birds and other wildlife, and generally protect and enhance the quality of life for residents.

The implementation of an effective urban forestry management plan leads to a tree population that maximizes benefits by increasing the number of trees in the population, improving tree health and increasing how long they live, all while minimizing costs, resulting in a healthy, well-maintained, vibrant tree population.



SECTION 2: THE CURRENT CONDITION OF THE URBAN FOREST

Current Condition of the Town’s Urban Forest

In January of 2025, certified arborists from Great Lakes Urban Forestry began data collection for a comprehensive inventory of the publicly managed trees within the municipal boundaries of the Town of Cicero, IL. The Town’s tree inventory project is the basis for this Urban Forestry Management Plan, detailing how this tree population will be managed to maximize the benefits for the Town of Cicero, its residents and its patrons, with a focus that begins in 2025 and projects out to 2035. This inventory data resulted in a total of 12,913 managed trees consisting of 114 species; however, the population’s diversity is extremely unbalanced with Maples, which make up 61% of the total number of trees. The charts and statistics in this portion of the Management Plan illustrate that the tree population in the Town is in below average condition and is generally younger to middle-aged, with few trees in the larger age categories. This plan will equip the Town of Cicero to address short-term concerns, long-term management considerations, and overall planning objectives.

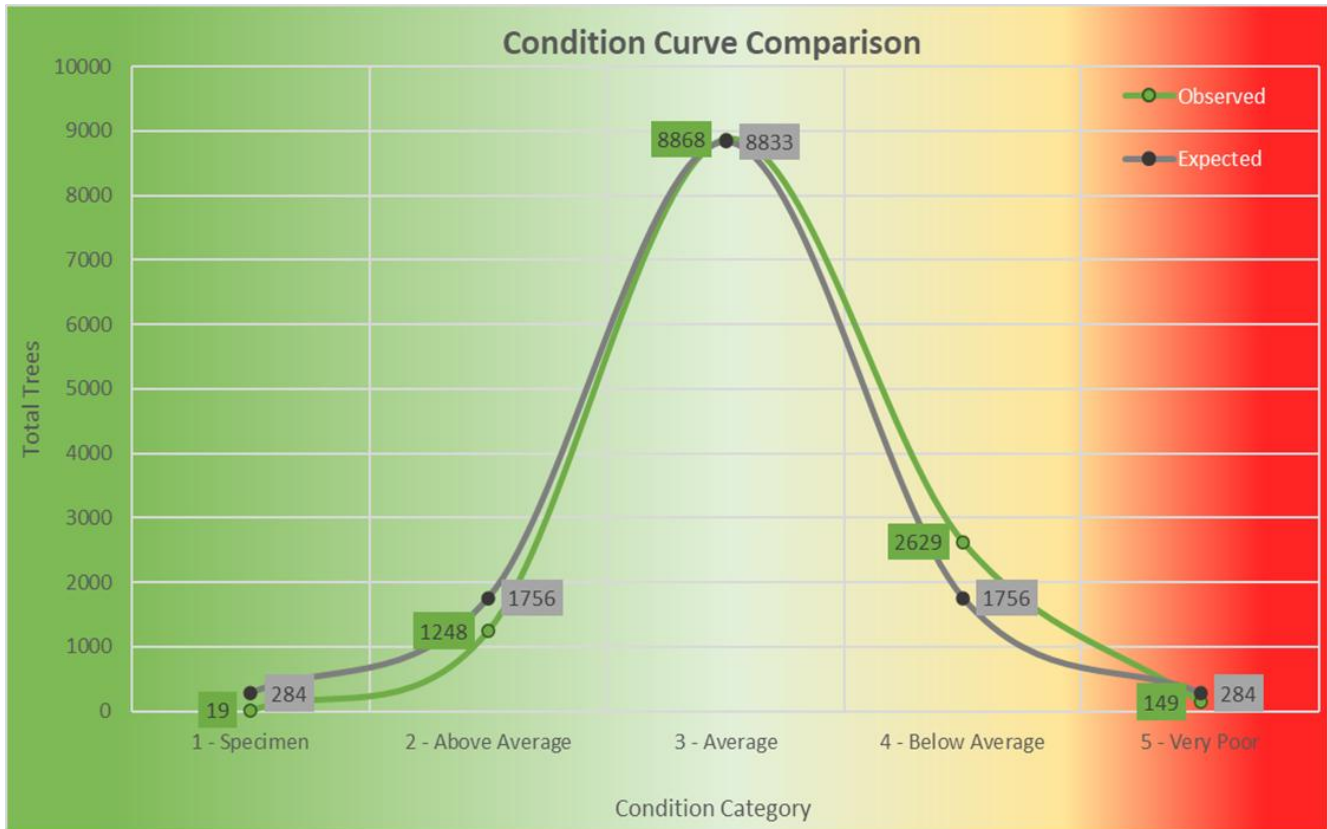
The following executive summary gives an overview of the findings of the 2025 inventory and an analysis of those findings.

Statistics – Managed Trees

CICERO TREE INVENTORY STATISTICS	
Number of Trees Inventoried	12,913
Number of Stumps Inventoried	119
Number of Planting Spaces Inventoried	5,984
Total Number of Species	114
Total Diameter Inches	183,308"
Average Tree Diameter	14.20"
Average Tree Condition	3.13 (Below Average)

Condition Curve

Condition 1	Specimen – Tree has no observable defects, wounds, diseases, and has textbook perfect form for the species. In addition, since young trees tend to be trouble free and homogenous, a Condition 1 tree must by definition be a minimum of 16” DBH. These are legacy trees, and as such are rare.
Condition 2	Above Average – Tree may have a small amount of deadwood, or a very limited number of minor defects. The overall form of the tree must be good, and consistent for the species in question. These trees should also be a minimum of 8” DBH. Often the difference between Condition 2 and 3 is form or growth habit.
Condition 3	Average – Tree has moderate but acceptable amounts of deadwood, wounds, or other defects, but is generally healthy. A wide variety of forms is acceptable for this group, which is meant to define the middle ground around which better or worse trees can be defined and identified.
Condition 4	Below Average – Tree has defects, deadwood, wounds, disease, etc. that have the potential to cause a need for removal. Very poor form or architecture can put an otherwise healthy tree in this category as well, due to the potential for tree or root failure.
Condition 5	Very Poor/ Dead – Tree must be removed. Physical or health defects are too far gone for the tree to be reasonably saved. Like Condition 1 trees, these are relatively rare, as generally trees that are getting to this level are removed before reach this stage.



This curve represents the distribution of trees in each of the categories enumerated above. As stated in the collection parameters section, deviations from the expected normal standard distribution can serve as a useful tool in analyzing the overall health of a tree population, and for this reason, we have included a theoretical curve representing a normal distribution so that comparisons can readily be made. The green line with green labels represents what we observed in the field, and the grey line with grey labels is the predicted normal distribution. The condition curve for the Cicero inventory indicates a tree population that is in overall below average condition.

The Condition 1, or specimen, trees were lower than would be predicted by the standard distribution alone, but we always expect that the specimen trees will come in lower than their statistical norm because of their rarity. A Condition 1 tree, by definition, must be at least 16” DBH (and generally much larger), have textbook perfect architecture for the species, and have no observable defects. About 40% of Cicero’s tree population meet the DBH threshold to qualify for this condition, however their structure, vigor, and/or defects prevent them from receiving this condition rating. As younger trees that are currently planted proper sites with adequate growing space grow and properly pruned and maintained, they should develop with good structure and may mature to become Condition 2 and eventually Condition 1 trees.

The Condition 5, or very poor, trees are lower than the expected norm, a positive sign of the timely removal of dead and declining trees. It is recommended that Condition 5 trees continue to be prioritized and removed in a timely manner.

The Condition 2, or above average, trees are significantly lower than what statistical analysis would predict. Similar to the Condition 1 category, Condition 2 trees need to have good structure that is consistent with the species in question and also be a minimum of 8" DBH. Nearly 75% of the inventoried trees measure 8" DBH or larger and qualify for the Condition 2 rating however only 13% of those trees were rated as Condition 2 due to the trees' structure, vigor, and/or defects. Looking toward the future, Cicero has an opportunity to increase the number of trees in the Condition 2 category. In general, if trees are properly planted, mulched, watered, and established, and site selection for the trees is well matched to the species, followed with cyclical pruning and maintenance, trees will often mature with good form and without significant defects. These trees can eventually become Condition 2 trees.

The Condition 4, or below average, trees are significantly higher than what would be statistically expected. Focusing on reducing the number of declining trees will not only help improve the overall condition of the population, but will also help improve overall diversity as underutilized species are planted in their place. Species diversity is further explained below. Cicero can use the data from this inventory to locate Condition 4 trees and prioritize them for maintenance or removal.

The trees in the Condition 3, or average, category are almost exactly what the statistical analysis would predict. In the next few years, as the below average trees receive pruning maintenance or are removed, we would expect this condition curve to shift more toward the average and above average categories.

Age-Class Diversity

Age-class diversity is an important quality of a healthy, vibrant urban forest. Young, intermediate and mature trees allow for regeneration, replacement and vigor in the overall forest community. A mixture of tree species, locations, and ages will lead to greater diversity, insulating a tree population against pest and pathogen outbreaks. Urban forest plantings can often create even-aged tree stands, so that all trees are approximately the same size and age. However, once these trees begin to decline, many will require removal and replanting simultaneously. This can leave areas without shade and aesthetics for long time periods.

A sustainable strategy is to plant trees over a longer timeframe. With this strategy, trees will grow to maturity in different stages and decline at different times. When declining trees are removed, there will still be a variety of age classes and tree sizes. This also reduces the pressure to plant trees in an area immediately after tree removal, helping to manage costs. Mixed age-class plantings ensure that mature trees are always present in a population and new plantings can be strategically planned.

An additional benefit of mixed-age plantings is the ability to plant shade-loving trees as well as sun-loving trees. When an area is newly planted with trees of the same age, all the trees are essentially in full sun. This reduces the ability to plant shade-loving trees. With mixed-age stands, shade-tolerant trees may be planted underneath the canopy of larger, mature trees.



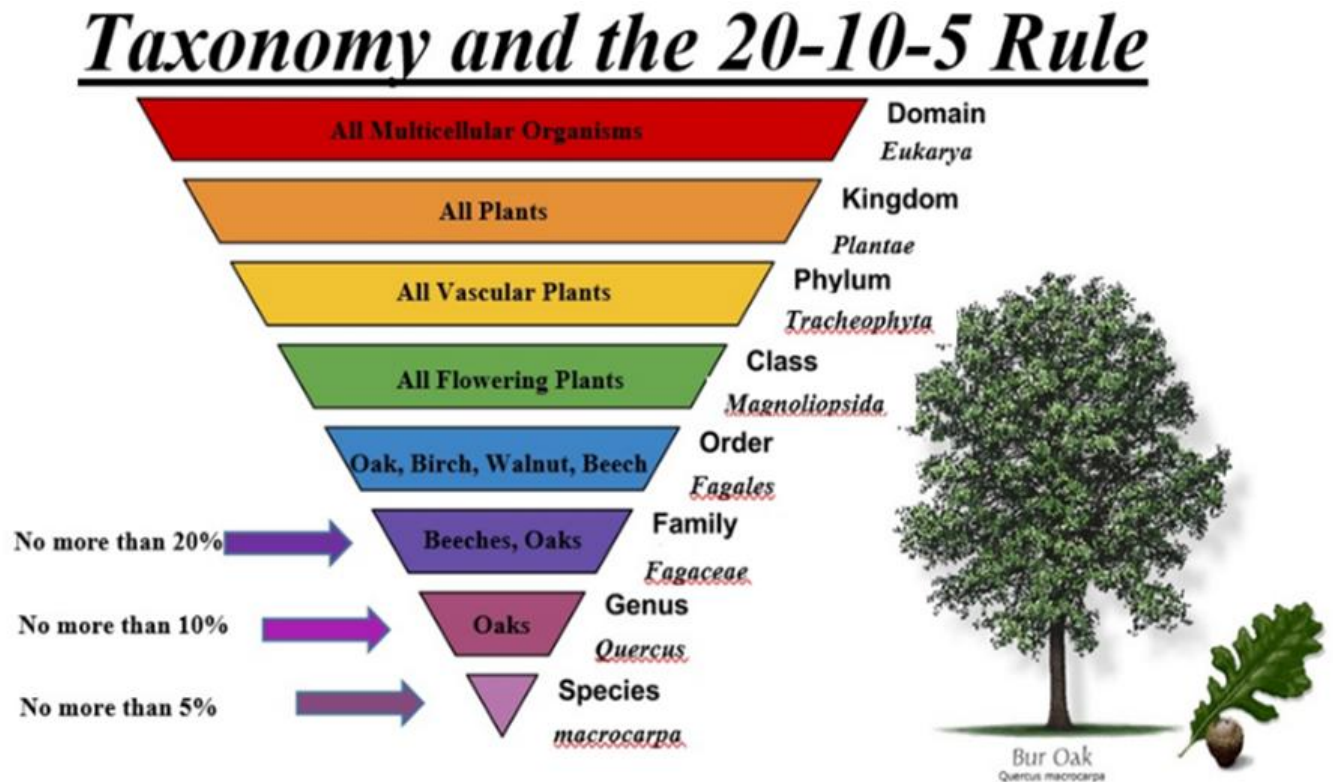
This age class analysis chart illustrates a somewhat typical trend in the overall age spread of a tree population seen in a municipal setting. We often see many trees being younger to middle aged and a relatively lower number of trees in the older age categories. As shown above, 23% of the total population has a DBH of 6" or less, which is an indication of a commitment to tree planting in recent years. It is assumed that most trees grow on average approximately $\frac{1}{2}$ " per year, although that figure varies significantly depending on the species in question, so we consider these trees (0-6" DBH) to be less than 15 years old. About 39% of Cicero's trees have a DBH of 7-12" which are estimated to be 15-25 years old. The 13-18" DBH category also make up approximately 24% of the population and are considered to be approximately 25-35 years old. The 19-24" DBH category which are generally mature trees over 35-45 years old represent another 15% of the total tree population.

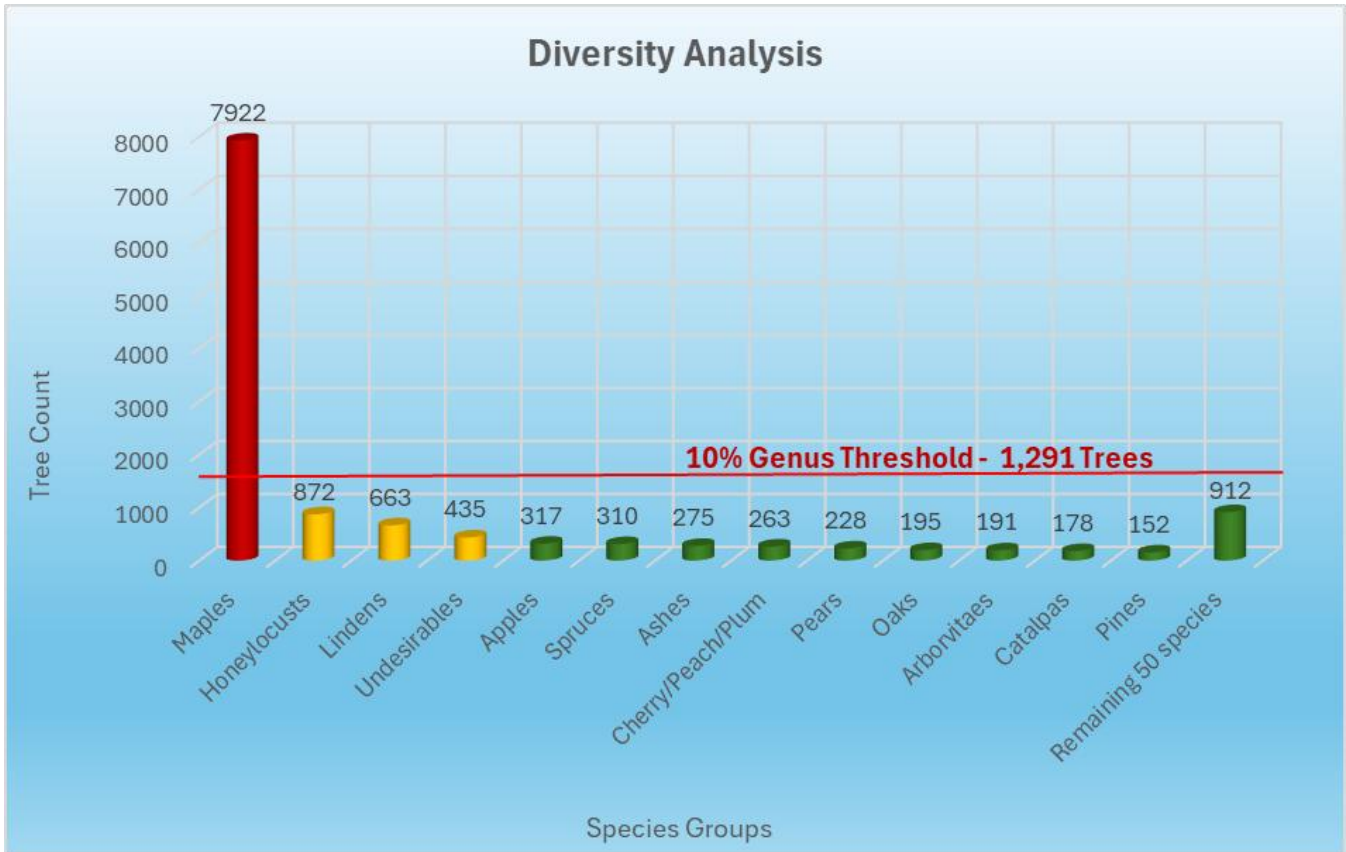
Trees measuring over 24" DBH make up approximately 13% of the total tree population. The 1,836 trees in the 25"+ DBH categories are considered to be about 45-50+ years old. It is typical for the number of trees in the 30"+ categories to be lower due to the natural senescence and ensuing decline of trees in urban settings. An equal number of trees in each age classification is, within reason, desirable and indicative of a consistent focus on tree planting and tree maintenance and shows that the right trees are being planted in the correct locations. A positive aspect of this chart is the commitment that is shown to new plantings within the last 25 years, as evidenced by the number of trees in the 1-12" ranges. Over time, as Cicero continues proper tree selection, planting and regular maintenance, the tree age classes will come to a more balanced level.

Taxonomic (Species) Diversity

Taxonomy is the method by which scientists classify plants, animals, and other life forms into distinct categories. A species is unique. There is only one type in that category, such as Burr Oak (*Quercus macrocarpa*), which refers to only one specific type of tree. A genus, however, is a group that may contain multiple species. All Oak trees, for instance, are in the genus *Quercus*. The further down the taxonomic ladder you go, the more similar things become.

The “20-10-5” rule has been adopted as a Best Management Practice in Urban Forestry. This rule simply states that a tree population should ideally have no more than 20% of any single family, no more than 10% of any single genus, and no more than 5% of any single species. Lessons from the Emerald Ash Borer and Dutch Elm Disease blights have taught that, when a pest or pathogen that attacks specific tree genera is introduced into a region where those genera are overrepresented, tree populations can take a devastating hit. Included are 10% genus threshold and 5% species threshold lines on the following diversity analysis graph, illustrating the desired composition of the inventoried tree population.





The tree population of the Town of Cicero has quite good overall diversity with 114 different species present. However, as shown above, the 7,922 trees in the Maple genus account for over 61% of the tree population, six times the recommended number for a population of this size. Although it is quite common for Maples to be the highest represented genus in urban settings because they are an adaptable and hardy shade tree, the issue is that if a pest or pathogen that attacks the Maple genus were introduced into our region (as we saw with EAB), Cicero could lose almost two thirds of its street tree population. Going forward with the help of this Urban Forestry Management Plan, Cicero will focus on reducing the number of poor condition and over-mature Maple trees.

The 435 trees in the undesirable category are species such as Mulberry, Boxelder, Cottonwood, Willow, Black Cherry, Siberian Elm, Poplar, and Black Locust. These trees are notorious for being fast growing and weak-wooded trees that develop a variety of structural defects as they mature. For safety, aesthetic, and ecological reasons, it is recommended that the Town continue to work toward the goal of gradually reducing the number of undesirable trees in its population and replanting them with a diverse set of tree species, further increasing the overall diversity and tree population stability.

Proper planning will help Cicero protect the investment in each new tree and create a future tree population that is more resilient and diverse. The Town of Cicero should have a targeted approach when it comes to choosing new species to plant and should focus on planting a wide variety of tree species and genera.

TOWN OF CICERO URBAN FORESTRY MANAGEMENT PLAN

The table below is an itemized list of all tree species present in the Town’s tree population, along with average DBH, and average condition for each species. The average condition ratings can be used as a guide as to what species are growing well.

SPECIES	COUNT	% OF TOTAL	AVG DBH	AVG COND
MAPLE-NORWAY	4444	34.41%	12.38	3.09
MAPLE-SILVER	1439	11.14%	24.62	3.21
MAPLE-RED	915	7.09%	7.34	3.11
HONEYLOCUST	872	6.75%	18.10	3.19
MAPLE-SUGAR	582	4.51%	16.29	3.02
MAPLE-AUTUMN BLAZE	464	3.59%	5.51	3.07
LINDEN-LITTLELEAF	333	2.58%	17.20	3.02
LINDEN-AMERICAN	326	2.52%	21.78	2.94
APPLE-CRAB SPP	282	2.18%	8.96	3.20
SPRUCE-BLUE	227	1.76%	11.27	3.07
PEAR-CALLERY	205	1.59%	10.24	3.16
ARBOR VITAE	191	1.48%	4.83	3.05
CATALPA	178	1.38%	26.07	3.17
ELM-SIBERIAN	150	1.16%	25.43	3.61
CHERRY-SPP	143	1.11%	6.16	3.13
ASH-GREEN	131	1.01%	13.74	3.83
ASH-WHITE	129	1.00%	14.01	3.71
PINE-AUSTRIAN	96	0.74%	11.51	3.15
PEACH	93	0.72%	3.42	3.17
AILANTHUS	92	0.71%	23.40	3.24
MULBERRY-SPP	85	0.66%	15.73	3.52
HACKBERRY	83	0.64%	10.01	2.98
SYCAMORE	77	0.60%	29.52	2.66
EASTERN REDCEDAR	72	0.56%	7.03	3.10
ELM-HYBRID	70	0.54%	7.73	2.97
AMERICAN REDBUD	68	0.53%	6.28	3.10
HORSECHESTNUT	56	0.43%	19.80	3.30
OAK-RED	51	0.39%	16.67	2.78
SPRUCE-WHITE	49	0.38%	8.00	3.04
BUCKEYE-OHIO	47	0.36%	12.32	3.02
OAK-PIN	47	0.36%	25.00	2.81
OAK-SWAMP WHITE	45	0.35%	8.04	2.96
PINE-WHITE	43	0.33%	12.12	2.95
LONDON PLANETREE	42	0.33%	16.52	2.79
ELM-AMERICAN	40	0.31%	33.15	3.35
KENTUCKY COFFEETREE	38	0.29%	5.66	3.05
MAGNOLIA-SPP	37	0.29%	6.43	3.14
APPLE-EDIBLE	35	0.27%	9.66	3.03

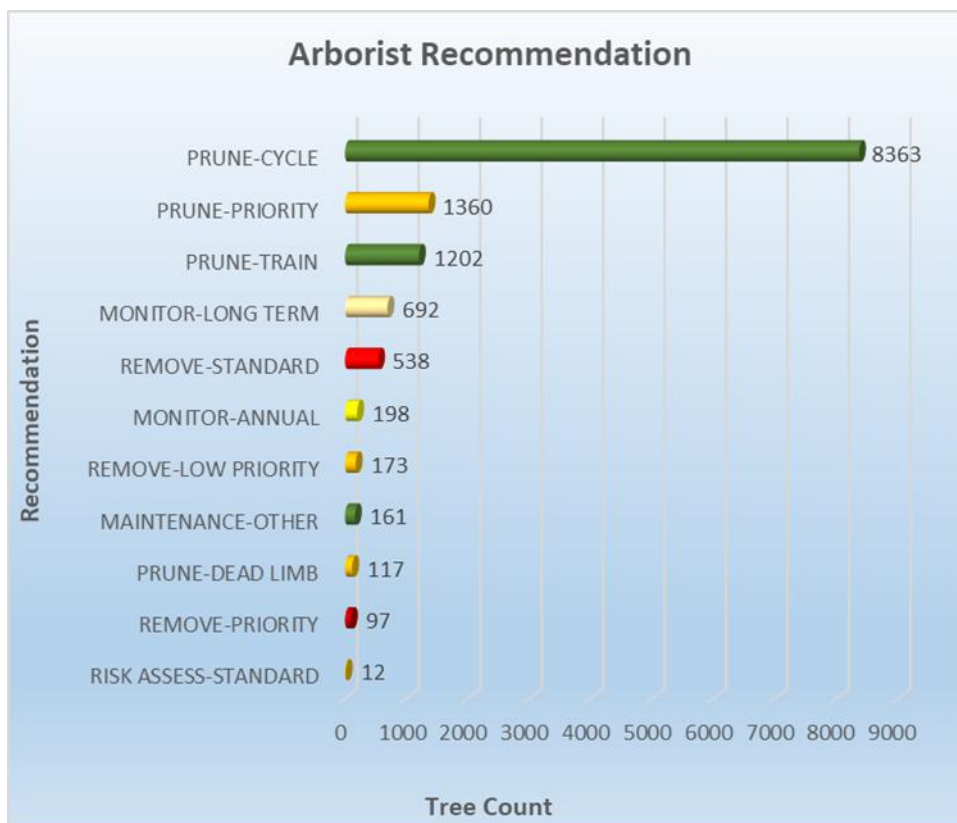
TOWN OF CICERO URBAN FORESTRY MANAGEMENT PLAN

OAK-BURR	35	0.27%	9.63	2.86
COTTONWOOD	27	0.21%	23.00	3.30
MAPLE-JAPANESE	27	0.21%	3.11	3.04
BOXELDER	26	0.20%	19.58	3.92
GINKGO	26	0.20%	17.35	3.27
BIRCH-RIVER	25	0.19%	12.96	2.72
SPRUCE-SPP	24	0.19%	5.67	3.17
PEAR-EDIBLE	23	0.18%	6.35	3.13
PLUM-SPP	23	0.18%	6.09	3.30
LILAC-TREE	20	0.15%	6.95	3.00
WALNUT-BLACK	18	0.14%	18.22	3.06
HAWTHORN-SPP	17	0.13%	10.47	2.94
MAPLE-MIYABEI	17	0.13%	8.06	2.94
WILLOW-SPP	17	0.13%	6.71	3.29
BLACK LOCUST	15	0.12%	24.87	3.33
MAGNOLIA-SAUCER	15	0.12%	12.53	2.80
MAPLE-BLACK	14	0.11%	6.50	2.86
SERVICEBERRY-SPP	14	0.11%	8.57	3.14
ASH-EUROPEAN	12	0.09%	18.75	3.67
LILAC-SHRUB	12	0.09%	9.58	3.00
BIRCH-WHITE	11	0.09%	9.45	2.91
DOGWOOD-CORNELIAN	11	0.09%	7.91	3.09
HORNBEAM-AMERICAN	10	0.08%	5.60	3.10
MAPLE-AMUR	10	0.08%	9.60	2.90
SPRUCE-NORWAY	10	0.08%	12.70	2.90
TULIPTREE	10	0.08%	14.50	3.10
DOGWOOD-SPP	9	0.07%	3.89	3.22
JUNIPER-COMMON	9	0.07%	6.00	3.11
BUCKTHORN	8	0.06%	9.63	3.63
WILLOW-WEeping	8	0.06%	17.63	3.25
BIRCH-GRAY	7	0.05%	11.00	3.14
DOUGLAS FIR	7	0.05%	8.71	3.00
OAK-CHINQUAPIN	7	0.05%	3.14	3.00
PINE-SCOTCH	7	0.05%	16.00	2.71
ROSE OF SHARON	7	0.05%	3.29	3.14
BALDCYPRESS	6	0.05%	19.33	2.83
SWEETGUM	6	0.05%	20.83	3.00
YEW	6	0.05%	4.50	3.17
MAPLE-HEDGE	5	0.04%	4.40	2.80
OAK-SHINGLE	5	0.04%	2.60	3.00
SMOKETREE	5	0.04%	8.80	3.00
APRICOT	4	0.03%	2.75	3.25
LINDEN-SILVER	4	0.03%	21.50	2.50

TOWN OF CICERO URBAN FORESTRY MANAGEMENT PLAN

ASH-BLACK	3	0.02%	26.33	4.00
ELM-RED	3	0.02%	13.33	3.33
IRONWOOD	3	0.02%	12.33	3.00
MAPLE-SPP	3	0.02%	2.00	5.00
OAK-WHITE	3	0.02%	9.33	3.00
PINE-LIMBER	3	0.02%	11.67	4.33
ALDER-SPP	2	0.02%	20.50	2.00
ASPEN	2	0.02%	6.00	3.00
BUCKEYE-BOTTLEBRUSH	2	0.02%	27.00	3.50
ELM-CHINESE	2	0.02%	6.50	2.50
FIR-SPP	2	0.02%	4.00	3.00
HICKORY-PECAN	2	0.02%	10.00	2.00
HICKORY-SHAGBARK	2	0.02%	9.50	3.50
HONEYSUCKLE	2	0.02%	6.50	3.50
MAGNOLIA-STAR	2	0.02%	1.50	3.00
MAPLE-PAPERBARK	2	0.02%	4.00	3.00
RUSSIAN OLIVE	2	0.02%	12.50	3.00
WALNUT-WHITE	2	0.02%	10.50	3.00
BEECH-SPP	1	0.01%	1.00	3.00
CHESTNUT-CHINESE	1	0.01%	17.00	4.00
DAWN REDWOOD	1	0.01%	31.00	2.00
HICKORY-MOCKERNUT	1	0.01%	21.00	4.00
HOLLY	1	0.01%	5.00	3.00
MAGNOLIA-CUCUMBER	1	0.01%	7.00	3.00
OAK-ENGLISH	1	0.01%	6.00	3.00
OAK-SAWTOOTH	1	0.01%	22.00	2.00
OSAGE ORANGE	1	0.01%	44.00	4.00
PINE-JACK	1	0.01%	17.00	2.00
PINE-MUGO	1	0.01%	14.00	3.00
PINE-RED	1	0.01%	12.00	3.00
POPLAR-SPP	1	0.01%	16.00	4.00
POPLAR-WHITE	1	0.01%	25.00	3.00
PRINCESS TREE	1	0.01%	28.00	4.00

Arborist Recommendations



In terms of Arborist Recommendations of maintenance needs in the Cicero tree population, the statistics displayed above show an encouraging trend overall. The majority of trees (65%) only require cyclical pruning on a regular basis, which is an overall desirable trait in a tree population. A cyclical pruning program will ensure that each public tree in Cicero will be pruned on a regular basis. Proper pruning will help to improve the overall condition of the tree population. However, 808 trees are recommended for removal. The 97 trees in the Priority Removal category should be prioritized over other removals. The 538 trees designated as Standard Removals should be prioritized and removed in a timely manner. The 173 trees in the Low Priority category should be removed as time and budget allow. The remaining categories, other than removals discussed above, were used to indicate trees in need of maintenance which should be prioritized over those in the Cyclical Prune category and will be discussed briefly below.

The 1,477 trees in the Prune-Priority and Prune-Dead Limb groups are trees which are simply overgrown, or have parts which need to be removed promptly, and should have pruning prioritized over the trees in the cyclical prune set. Generally, we consider this to be a “within 1-3 years” level of pruning.

The 890 trees in the two Monitor categories can be viewed as being in a transitional phase. For the most part, the tree has an indiscernible defect or shows signs of developing issues or general

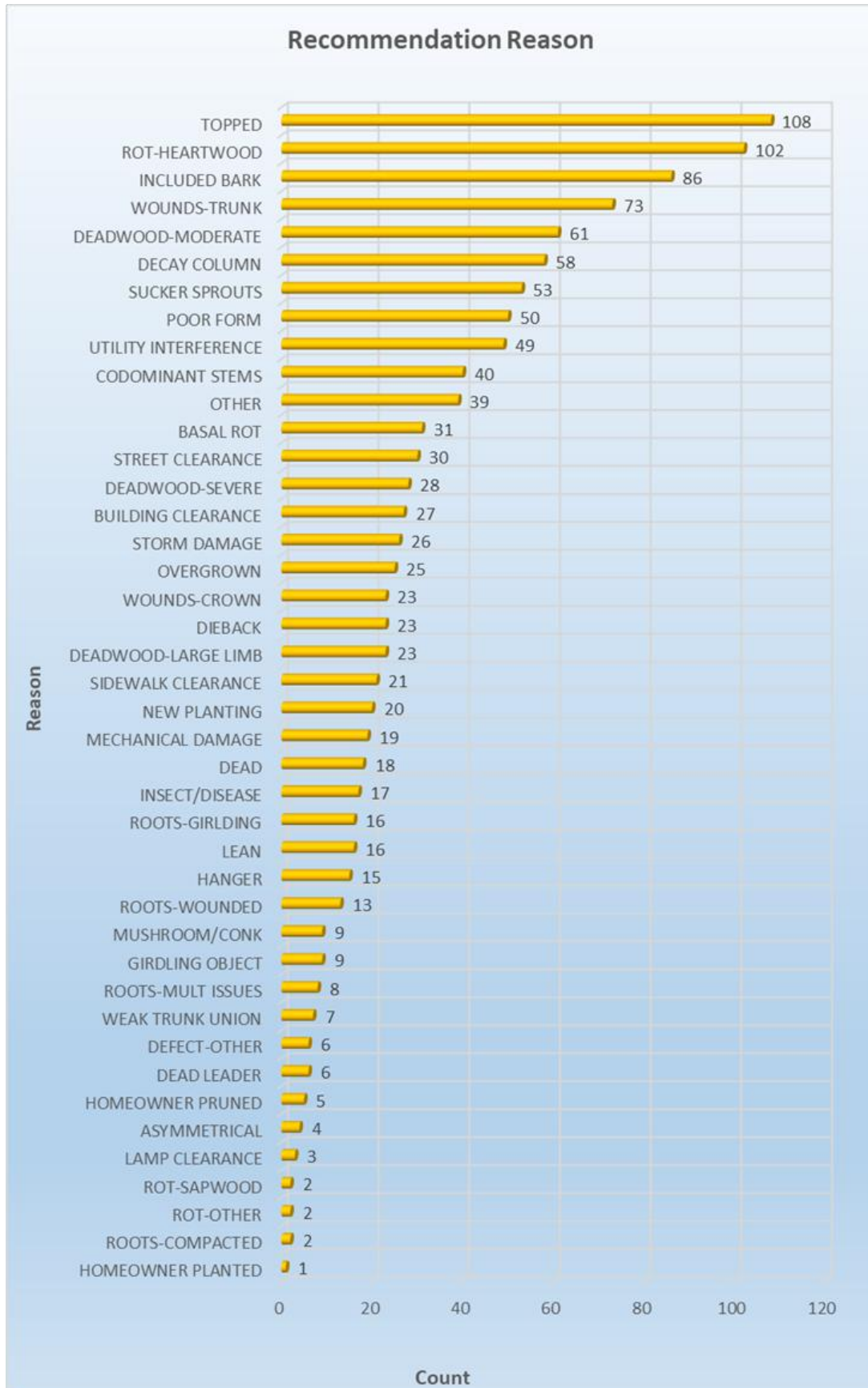
decline which must be observed. These trees should be reassessed periodically, and their maintenance status updated.

The 1,202 trees categorized as Prune-Train are generally trees smaller than 8" DBH that have structural issues or are overgrown and require selective pruning to establish better architecture in the future. Establishment pruning, or the pruning of young trees to establish proper branching habit and structure, is one of the least expensive yet most effective maintenance items that can be performed on a young tree.

The 161 trees in the Maintenance-Other category typically need some other form of maintenance not covered in the rest of the categories, mostly the removal of girdling objects, anchor staking, or the need for root collar excavation. A description of the maintenance needed should be found in the recommendation reasons or comments fields.

There were 12 trees which received Risk Assessment recommendations, these may have developed defects and require more in-depth inspection and analysis to determine Cicero's risk tolerance threshold and the need for mitigation efforts. It is recommended that a Level 2 Basic Risk Assessment be performed on these trees (per TRAQ or ANSI A300 Pt 9 Standards), or equivalent (ISA Tree Risk BMP methodology, Matheny and Clark, etc).

The arborist recommendation reasons on the following chart summarize the field observations into the main factors that justify the arborist recommendation, the condition, and the risk rating of each tree. Some trees may have more than two factors, but the two most prominent issues that directly pertained to the maintenance recommendation or condition were noted. Cicero can use this inventory data to query specific defects and prioritize mitigation actions. This chart illustrates an interesting overview of the health, defects, and maintenance needs of the Town of Cicero's tree population.



Risk Level Summary

These were rapid assessments, and not full risk assessments, and as such, are meant to indicate a need for further study, and do not represent a legal description of these trees' risk levels. These assessments are not legally binding and are not intended to be utilized as evidence in a court of law. They serve primarily for internal record keeping, and a means of locating trees which require more detailed study before making a final decision as to management strategy. Since the risk level field is part of the data collection parameters for the Town of Cicero inventory, it is recommended that Cicero develop and implement a tree risk assessment policy so that consistency and accountability are successfully achieved.



As illustrated in the chart above, the majority of Cicero trees were found to have no observable risk level. However, 1,057 trees were found to have some degree of risk. There were 11 trees that fell into the Critical Risk category, these should be examined by Cicero staff and receive immediate mitigation actions (see list in Appendix O). Trees that fall into the Substantial risk level category should receive a Level 2 Risk Assessment and/or mitigating action. Any tree found to pose an Elevated risk level should be monitored and/or inspected by Cicero and a threshold of risk tolerance be established. Some Elevated risk level trees may also be considered for a Level 2 Risk Assessment and/or mitigating action.

Section 3: GOALS, OBJECTIVES, STRATEGIES

Goals, objectives and strategies are at the heart of this urban forest management plan and are crucial for effective strategic planning. Data collected from a comprehensive inventory has been analyzed; strengths and areas needing improvement in the management of the urban forest have been identified. These identified areas have been formalized into the following goals, objectives and strategies, giving a blueprint for the Town to follow for the next ten years and beyond. Although these goals, objectives and strategies are very specific, these are not written in stone and should be revisited periodically to determine effectiveness and to revise and course correct as needed.

This blueprint has been organized in the following manner:

- Goals are broad primary outcomes that are clear, concise statements of direction.
- Objectives are measurable steps presented that will lead to achieving the goals.
- Strategies are clear, defined actions and approaches that are designed for the successful execution of objectives.

Timeframes are essential for plan effectiveness. Short-term objective timeframes are one to three years. Long-term objectives are three to ten or more years. The action plan following the goals section defines specific steps and provides suggested timelines and budgets needed for implementation.

Goal #1: Increase Urban Tree Canopy Through Planting

Increase the stocking density on Town of Cicero property from the current level of 64% to 80%.

- Short-term Objective: Implement proper planting and establishment practices for all new trees through proper selection, planting, and post planting care, allowing trees to become well-established, creating more canopy cover.
 - Strategy: Determine the right tree in the right place for all planting plans.
 - Strategy: Utilize detailed plant material and planting specifications for contractors to follow, coupled with inspections for adherence to specifications by Town representatives before, during, and after planting.
 - Strategy: Acquire equipment and hire part-time staff for regular summer tree watering for the first two years after planting.
 - Strategy: Train in-house staff to conduct establishment pruning on all new plantings in the third year after planting. Begin pruning.
- Long-term Objective: Increase managed tree count to 15,000 trees (80% of capacity).
 - Strategy: After the 808 recommended removals are complete, the tree population count will be 12,105 trees. Cicero plants 150 trees each year; increase that number to 300 trees per year to build up the number and types of trees during the 10-year timeframe of this plan and bring the inventory up to 15,000 trees.

Goal #2: Increase Urban Tree Canopy Through Proper Tree Care

Increase total canopy cover provided by the public tree population through improving tree health, size and vigor.

- Short-term Objective: Implement consultant's recommended priority and standard tree removals and priority pruning.
 - Strategy: Conduct recommended priority removals in the second year of the management plan implementation.
 - Strategy: Conduct recommended standard removals beginning in the third year of the management plan implementation.
 - Strategy: Conduct recommended low-priority removals in the fifth year of the management plan implementation.
 - Strategy: Conduct priority pruning on all Town of Cicero managed trees, complete by the end of year three of the plan.
- Long-term Objective: Create a cycle pruning program.
 - Strategy: By year three, after the recommended priority tree removal and priority pruning is complete, begin a cyclical pruning program. This program will ensure that all trees on Town property are pruned every six years, increasing tree health and vigor while reducing costs associated with storm damage and tree failure.
- Long-term Objective: Reduce the number of low-quality undesirable trees in the inventory.
 - Strategy: Low-quality undesirable trees identified in the inventory will be removed as they decline and/or pose higher levels of risk, where appropriate.
- Long-term Objective: Maintain an accurate, up to date tree inventory.
 - Strategy: Use ESRI software to maintain the inventory data on a GIS platform and keep planting and removal data up to date using computers and/or tablets.
 - Strategy: The inventory should be updated periodically (ideally every five years) by a forestry consultant to keep the information current on a town-wide scale.

Goal #3: Implement Best Management Practices in Tree Care Operations

- Short-term Objective: Follow all referenced tree care related ANSI standards and ISA Best Management Practices.
 - Strategy: Standards will be made available to all staff and contractors that are performing tree care operations.
 - Strategy: Conduct regular annual training on tree care operation BMPs for all in-house tree care staff. This training will also be given to new employees assigned to the forestry department. These may be in-house or seminars.
 - Strategy: Require and monitor adherence to tree protection standards by all contractors and staff for all construction projects.

Goal #4: Increase Species Diversity

Increase species diversity to protect the urban forest from catastrophic losses due to invasive insect and disease pests and changes to climate.

- Long-term Objective: Decrease the Maple species percentage in the population from 61% to 50%.
 - Strategy: Create a list of underutilized and unused species to draw from for planting planning.
 - Strategy: Eliminate the planting of Maples for the first three years of the plan.
 - Strategy: After year five, incorporate a limited number of Maples in planting plans, not to exceed 2% of the total planted per year. Revisit this after year 10 by analyzing current inventory data.
 - Strategy: Review the acceptable and unacceptable species planting list periodically to ensure that it is maintained in accordance with the latest information on successful species, climate change, and insect and disease management.

Goal #5: Decrease Potential Risk from Tree and Tree Part Failure

- Short-term Objective: Mitigate or conduct higher levels of risk assessment on trees with potential risk identified in the 2025 inventory.
 - Strategy: Cicero staff inspect and mitigate trees identified with critical risk issues as soon as possible.
 - Strategy: Cicero staff inspect the 12 trees recommended for Level 2 Risk Assessments and determine course of action: remove or conduct risk assessment.
 - Strategy: Cicero staff inspect trees with substantial risk issues and mitigate or conduct higher level risk assessments by the end of Year 2.
 - Strategy: Cicero staff inspect trees with elevated risk issues and mitigate or conduct higher level risk assessments by the end of Year 4.
- Long-term Objective: Create, adopt and implement a tree risk policy and procedures.
 - Strategy: Create and adopt a tree risk policy that states the intent of the Town of Cicero to make reasonable efforts to identify potential elevated risk and high-risk trees that are in their care.
 - Strategy: Create, adopt and implement procedures that identify potential tree risk and allow staff to make reasonable risk mitigation decisions based on the risk levels found, level of acceptable risk, budget constraints, and other factors that affect work priorities.

Goal #6: Create and Follow Equipment and Personnel Budget Plan

- Long-term Objective: Create forestry capital equipment procurement and replacement plan.
 - Strategy: Inventory capital forestry equipment and create 10-year replacement and procurement plan for capital expenditures.
- Long-term Objective: Investigate and budget for forestry personnel.
 - Strategy: Track in-house and contracted hours spent on implementing the forestry management plan for plan years 1-4. Create a 10-year plan for additional personnel needed to implement the management plan for the urban forest.

Goal #7: Increase Public Awareness

- Long-term Objective: Increase public awareness of trees and their benefits to the community and to the environment, and for benefits to residents' mental and emotional health.
 - Strategy: Public Meetings. Hold three public meetings to educate residents on the Town's Urban Forestry Management Plan project and on the benefits and the care of trees, for a total of six hours. Presentations will be both in English and Spanish.



SECTION 4: ACTION ITEMS, SCHEDULES AND BUDGETS

ACTION ITEMS AND SCHEDULE

ACTION ITEM	DESCRIPTION	COMPLETION TIMELINE	LONG-TERM GOAL BENCHMARKS
Year 1- FY 2025,2026			
Goal #1 Objective: Planting and establishment practices. Strategy: Right tree/right place in plans	Create parameters for defining the right tree/right place for plans	2/1/2026	
Goal #1 Objective: Planting and establishment. Strategy: Specifications and inspections	Work with consultant and UFMP to formalize planting specifications for all contractors and staff	3/1/2026	
Goal #1 Objective: Proper planting and establishment practices. Strategy: Tree watering	Acquire watering equipment, hire and train staff	5/30/2026	
Goal #3 Objective: Follow ANSI Standards and ISA BMPs. Strategy: Provide to Staff and contractors	Provide Tree Care ANSI Standards and BMPs to staff and contractors	2/1/2026	
Goal #4 Objective: Increase species diversity to 82 species. Strategy: Create list	Create a list of underutilized and unused species to draw from for planting planning.	12/1/2026	
Goal#5 Objective: Mitigate identified risk. Strategy: Mitigate Critical Risk	Inspect and mitigate 11 Critical risk trees	9/1/2025	
Goal #5:Objective:Mitigate identified risk. Strategy: 12 trees recommended for Level 2 Risk Assessments	Staff inspect 12 trees recommended for Level 2 Assessments and determine course of action for each: remove or contract TRAQ arborist to conduct risk assessment.	5/1/2026	

TOWN OF CICERO URBAN FORESTRY MANAGEMENT PLAN

Goal #7: Public Awareness. Objective: Increase public awareness. Strategy: Public Meetings.	Forestry consultant to present a program at three public meetings to educate residents on the Town's Urban Forestry Management Plan project and on the benefits and the care of trees, for a total of six hours. Presentations will be both in English and Spanish.	12/15/2026	
Year 2- FY 2027			
Goal#1 Objective: Increase tree count to 15,000. Strategy: Plant 300 trees/year. Goal #4 Objective: Decrease percentage of Maples . Strategy: No Maples in planting plans until after year 5	Create planting plan using right tree/right place, no Maples planted until 2030, create RFP for 300 new trees, plant, inspect for adherence to planting and establishment specs	6/1/2027, ongoing	300 trees budgeted and planted annually
Goal #2 Objective: Tree removals and priority pruning, Strategy: Conduct Priority Removals. Goal #5 Objective: Mitigate identified risk. Strategy: Mitigate Substantial Risk	Create RFP for 90 priority removals, In-house staff remove 7 trees.	6/30/2027	
Goal #2 Objective: Tree removals and priority pruning, Strategy: Conduct 1/2 of Priority Pruning. Goal #5 Objective: Mitigate identified risk. Strategy: Mitigate Substantial Risk	Create RFP for 740 trees for priority pruning.	12/15/2027	
Goal #3 Objective: Follow ANSI Standards and ISA BMPs. Strategy: BMP training	Staff training on tree care BMPs- twice yearly, in-house and seminars	begin May 2027-ongoing	
Goal #3 Objective: Follow ANSI Standards and ISA BMPs. Strategy: Adhere to tree construction protection standards	Adherence to tree protection standards by all contractors and park staff for all construction projects will be required and monitored.	5/1/2027	Documented inspections by staff or consulting arborist for all construction projects
Goal#5 Objective: Mitigate identified risk. Strategy: Mitigate Elevated Risk	Inspect 146 trees designated with Monitor recommendation and with Elevated risk status	11/1/2027	

TOWN OF CICERO URBAN FORESTRY MANAGEMENT PLAN

Year 3- FY 2028			
Goal #1 Objective: Planting and establishment. Strategy: Establishment pruning	Train in-house staff to conduct establishment pruning on all new plantings in the third year after planting. Begin pruning.	Begin November 2028-ongoing	
Goal #2 Objective: Tree removals and priority pruning. Strategy: Conduct second 1/2 of Priority Pruning	Create RFP for 740 trees for priority pruning.	12/15/2028	
Goal #2 Objective: Tree removals and priority pruning. Strategy: Conduct Standard Removals	Schedule 1/3 Standard removals (113 contracted, 53 in-house trees), remove trees.	12/15/2028	
Year 4- FY 2029			
Goal #2 Objective: Tree removals and priority pruning. Strategy: Conduct Standard Removals	Schedule 1/3 Standard removals (113 contracted, 53 in-house trees), remove trees.	12/15/2029	
Goal #2 Objective: Create Cycle pruning program. Strategy: Implement 6-year cycle pruning schedule	RFP to cycle prune 1/6 of inventory, 1,068 trees over 12", per year	Begin January 2029, ongoing	Cycle pruning budgeted and contracted annually
Goal #2 Objective: Maintain an inventory. Strategy: Utilize ESRI software to keep removals and plantings up to date	Staff maintain inventory planting and removal data up to date using computers and/or tablets on the GIS platform .	1/30/2029, ongoing	Removals and plantings lists match updated inventory
Goal #4 Objective: Decrease percentage of Maples . Strategy: Begin utilizing Maples in planting plans	Begin to incorporate a limited number of Maples in planting plans, not to exceed 2% of the total planted per year. Revisit this after year 10 by analyzing last inventory data.	3/1/2029 and ongoing	Use latest inventory update data to determine decrease in % of Maples in the population
Goal #4 Objective: Increase species diversity. Strategy: Review acceptable/unacceptable planting list	Review the acceptable and unacceptable species planting list periodically to ensure that it is maintained in accordance with the latest information on specific trees.	1/31/2029	List created and utilized for planning. Revisit in year 10.
Year 5-FY 2030			
Goal #2 Objective: Maintain an inventory. Strategy: Update tree inventory.	Contract forestry consultant to update the tree inventory and repeat every five years	11/30/2030	Inventory completed by the end of FY 2030

TOWN OF CICERO URBAN FORESTRY MANAGEMENT PLAN

Goal #2 Objective: Tree removals and priority pruning. Strategy: Conduct Standard Removals	Schedule 1/3 Standard removals (113 contracted, 53 in-house trees), remove trees.	12/15/2030	
Goal #2 Objective: Tree removals and priority pruning. Strategy: Conduct Low Priority Removals	Low Priority removals: create RFP for 66 trees over 12", in-house staff remove 107 small trees	11/30/2030	
Goal #6 Objective: Create plan for replacing forestry capital equipment. Strategy: Create 10-year plan	Create 10-year capital expenditure plan for replacing existing and procuring new forestry equipment.	8/1/2030	Schedule created and used for 2031 and onward budgets
Goal #6 Objective: Investigate and budget for forestry personnel. Strategy: Create 10-year plan	Track in-house and contracted hours spent on implementing the forestry management plan for plan years 1-4. Create a 10-year plan for additional personnel needed to implement the management plan for the urban forest.	8/1/2030	Schedule created and used for 2031 and onward budgets
Year 6-FY 2031			
Goal #2 Objective: Tree removals and priority pruning. Strategy: Conduct Low Priority Removals	Low Priority removals: create RFP for 66 trees over 12", in-house staff remove 107 small trees	11/30/2031	
Years 7-10-FY 2032-2035			
Goal #5 Objective: Tree Risk policy and procedures. Strategy: Create and adopt a tree risk policy	Create and adopt a tree risk policy that states the intent of the Town of Cicero to make reasonable efforts to identify potential elevated risk and high-risk trees that are in their care.	6/1/2031	Policy adopted into Town Risk Management Plan
Goal #5 Objective: Tree Risk policy and procedures. Strategy: Create and adopt tree risk procedures	Create, adopt and implement procedures that identify potential tree risk and allow staff to make reasonable risk mitigation decisions based on the risk levels found, level of acceptable risk, budget constraints, and other factors that affect work priorities.	6/1/2031	Procedures adopted into procedure manual and implemented by staff

PROJECTED BUDGET

The following budget projections are conservative figures based on current industry rates for the services listed. The budget begins with \$66,350 in fiscal year 2025/26 and from there increases as priority pruning and removals identified in the 2025 inventory are finished up in FY 2029/30, followed by regular ongoing maintenance expenses projected to be \$399,950 in 2035.

REMOVALS	Fiscal Year	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31-2035
	Trees Removed	10	90	113	113	113	125/year
	Diameter inches	320	2,297"	2,192"	2,192"	2,192"	2,500"/year
	Notes	Critical Risk Removals	All Priority Removals over 12"	1/3 of Standard Removals over 12"	1/3 of Standard Removals over 12"	1/3 of Standard Removals over 12"	Low priority removals, declining trees
	Cost 2025	\$3,200	\$91,880	\$87,680	\$87,680	\$87,680	\$100,000
	Cost CPI	\$3,200	\$91,880	\$87,680	\$87,680	\$87,680	\$103,000

PRUNING	Fiscal Year	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31-2035
	Trees Pruned	1	740	740	1,068	1,068	1,068/year
	Notes	Critical Risk Prune	1/2 Priority Pruning	1/2 Priority Pruning	Annual cycle prune	Annual cycle prune	Annual cycle prune
	Cost 2025	\$150	\$82,880	\$82,880	\$120,000	\$120,000	\$120,000
	Cost CPI	\$150	\$82,880	\$82,880	\$120,000	\$120,000	\$123,600

PLANTING	Fiscal Year	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31-2035
	Trees Planted	150	300	300	300	300	300/year
	Notes		Annual planting	Annual planting	Annual planting	Annual planting	Annual planting
	Cost 2025	\$60,000	\$120,000	\$120,000	\$120,000	\$120,000	\$120,000
	Cost CPI	\$60,000	\$120,000	\$120,000	\$120,000	\$120,000	\$123,600

MISC FORESTRY EXPENSES	Fiscal Year	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31-2035
	Notes	Training, Risk Mgmt.	Training, Risk Mgmt.	Training, Risk Mgmt.	Training, Risk Mgmt.	Training, Risk Mgmt.	Training, Risk Mgmt.
	Cost 2025	\$3,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Cost CPI	\$3,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,150

TOTALS	Fiscal Year	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31-2035
	Cost 2025	\$66,350	\$299,760	\$295,560	\$332,680	\$332,680	\$345,000
	Cost CPI	\$66,350	\$299,760	\$295,560	\$332,680	\$332,680	\$355,350

SECTION 5: TREE MAINTENANCE ACTIVITIES

TREE REMOVALS

Reasons for Tree Removal

Removal of trees in public spaces is an unavoidable reality of managing large tree populations. When the trunk, branches or roots fail, a standing tree can cause personal injury or property damage, and even small dead trees can be an eyesore. Old trees can hold great sentimental value, and many people become attached to them. However, there are times when their presence creates a public hazard, and it is at those times that action must be taken to ensure public safety. It is also important to remember that the removal of a tree today is the promise of a new tree for tomorrow!

Removal of trees on Town property shall always be at the discretion of Cicero staff and/or the forestry consultant. Trees will never be removed without a sound reason from staff or forestry consultant. Neighboring residents and concerned patrons may request a tree to be removed for reasons not detailed below, and these requests will be reviewed by Town staff, the Board of Trustees, or the forestry consultant.

Trees with a greater need for removal based on public safety will always hold a higher priority. Under no circumstances will The Town of Cicero be responsible for trees which are not on its property, except for pruning potentially hazardous limbs overhanging its property.

Dead or Dying

If a tree is biologically dead or nearly dead, it will require removal. Trees which are standing dead, have approximately 50% dead crown or greater, or have less than approximately 40% structurally sound wood in the cross-section of the trunk, shall be removed as expediently as practical. These determinations shall be at the discretion of Cicero staff or the forestry consultant.

Diseased or Infested

Diseases are caused by viral, fungal, or bacterial pathogens. Infestations are caused by insects or other small animals. Dutch Elm Disease and Oak Wilt, for example, are fungal diseases that kill Elm and Oak trees when they are infected. Emerald Ash Borer is an insect which kills Ash trees by infesting them. The prompt removal of diseased or infested trees limits the exposure of other nearby trees. The removal of one tree may save dozens of others. Trees deemed to be diseased or infested by Cicero staff or the forestry consultant shall be removed as expediently as possible in order to slow the spread of such insects and diseases.

High or Extreme Risk

Tree risk is the potential of a tree or tree part to impact a nearby person or piece of property and cause property damage or personal injury. This topic is of great interest in arboriculture today, and the insurance industry is becoming increasingly involved in the process of assessing and managing the risk posed by trees. Litigation involving trees is a perennial concern for public

entities. All trees in the inventory were assessed for a basic level of risk, and 1,057 trees were found to have some level of elevated risk.

If a tree is deemed to be a high or extreme risk the entire tree may need to be removed as a means of reducing its residual risk to zero. However, risk can often be mitigated by removing a portion of the tree or other corrective measures. Town staff, the forestry consultant or another TRAQ (Tree Risk Assessment Qualified) risk assessor may assess the tree and prepare a tree risk assessment report to determine risk mitigation options. If such risk can best be safely mitigated by tree removal, as opposed to pruning or other measures, then timely removal is critical because of potential exposure of the public or property to potential harm.

Emergency / Storm Damage Removals

A tree shall be removed if it has been severely damaged and/or compromised by lightning, wind, or other such weather event. "Storm-damaged" shall be generally defined as a tree which has lost 33% or more of its crown, has a large crack or other wound in the trunk, has a lean of greater than ten degrees from vertical resulting directly from strong winds, has sustained a lightning strike, or other such issues directly related to storm events. Town staff or the forestry consultant shall determine the need for removal of a tree in these cases. However, in emergency situations such as a tree impacting a person, vehicle, power lines, or other such emergency, Cicero may perform any actions necessary to abate public hazards so long as they are in compliance with all relevant arboricultural standards and practices.

Damage from Construction or Vehicle Strike

Town staff or the forestry consultant shall assess trees that have been impacted by a vehicle strike or piece of construction equipment. If the tree has suffered physical damage or extreme root compaction and is likely to decline and become high risk, it will be scheduled for removal to maintain public safety. That decision will be based on the best professional judgement of the forestry consultant or staff.

Interference with Utility or Signage

A tree shall be removed if it is interfering with the function or visibility of official traffic control devices or has impacted above or belowground utilities in a manner that cannot be mitigated by pruning or other measures. In these cases, it is likely that no new tree will be planted on these sites.

Overplanted and Underperforming

No healthy tree shall be removed for the sole reason of having been overplanted. As a result of this plan, Cicero will be enhancing diversity in the urban forest, with the goal of building a diverse urban forest. Overplanted species listed as being in poor condition will be reviewed to assess further decline or recovery. Those trees in noticeable decline shall be removed at the discretion of staff and/or the forestry consultant. This will be used as a preventative measure so that these trees do not continue to decline to a point where they become hazardous and not used as a reason to remove an otherwise healthy tree.

Implementing the Removal Plan

The first step towards attaining Town of Cicero's forestry goals will be to remove trees which are diseased, dying, or present a hazard. At present, there are 808 trees which have been identified in the inventory for removal. Of these, 97 are listed as Priority Removal, 538 are listed as Standard Removals, and 173 are listed as Low Priority Removals based on the tree inventory data. A short-term objective of this Urban Forestry Management Plan is to have all identified trees marked as Removals during the inventory to be removed within four calendar years of this plan's adoption. Trees 12" and under are assumed to be small enough for Town staff to perform the removals; trees 13" and larger will be contracted.

By percentage, removals represent approximately 6% of the total population, which is a reasonable expectation. Typically, municipal inventories reveal between 3-5% of the tree population requiring some form of removal. The 97 Priority Removals are scheduled to be removed in the first year of the plan, 90 are over 12" to be removed by a qualified contractor. Of the 538 Standard Removals, 340 are over 12" to be removed by professional arborists; these are scheduled over years two, three and four. There are 173 Low Priority removals, 66 are over 12" to be removed by contractors, the remainder can be removed in-house.

After this initial four-year period to address the removals identified in the inventory, it is anticipated that the background rate of tree removal will be approximately 125 trees per year. From 2030 forward, re-evaluation of the tree population on an annual or semiannual basis by staff or the forestry consultant will specify which trees require removal. These numbers are meant to be placeholders for budget calculations and diversity standards. This does not require that 125 trees be removed each year, this is simply a projection based on the existing inventory data.

For purposes of projection, costs have been estimated using a rate of \$40/diameter inch for tree removal and stump grinding, which is a conservative estimate based on current market pricing. Rates could certainly be found lower than this in a competitive bid process or using in-house labor. As is the case with all cost projections for this Plan, no cost increase is assumed for the first four years, and a 3% annual cost increase is assumed thereafter. This is also a conservative estimate based on the Consumer Price Index, and actual costs are likely to be lower than projected.

Town of Cicero Tree Removal Basic Requirements and Standards

All the following requirements and standards shall be met during tree removal activities as a matter of local policy. For a more detailed view of the specific ANSI and ISA standards, see Appendix I.

Safe Removal of a Tree to an Appropriate Flush Cut

Tree removal can be dangerous but is very safe when performed by professionals. Therefore, all tree removal activities on Town of Cicero property should be performed under the guidance

of a certified arborist or other experienced tree worker. This may be the supervision of staff or the forestry consultant alongside a contractor. Proper removal of a tree involves safe removal and lowering of all portions of the tree according to all relevant ANSI standards and Best Management Practices.

Stump Grinding

Within a reasonable amount of time following the removal, stumps and surface roots should be removed using an approved stump grinding machine, such that the stump is ground to a minimum depth of 6 inches, and no surface roots are visible. If the site is to be planted with a new tree, that depth should be increased to 12 inches below the soil surface. This will ensure that a new tree may be successfully planted, and that no re-sprouting will occur from the old stump. The depths to which the stump must be ground may be altered by the Town depending on needs for specific circumstances or contracts. Until the planting space is fully restored, the stump hole should be filled and compacted to ground level using the debris resulting from the stump removal.

Planting Site Restoration

Once the tree has been safely removed and the stump has been ground out, the open planting space should be fully restored if a tree is not scheduled to be planted in or adjacent to the same spot. Site restoration consists of removing the stump chips from the hole, filling it with a quality mineral topsoil, tamping down to match the surrounding grade, spreading grass seed over the top of the topsoil, and securing turf blanket over the topsoil. This will ensure that grass grows to restore the aesthetics and function of the old site and prevents tripping hazards from the removal scar.

Town of Cicero Internal Policies

- All personnel directly involved with the process of chainsaw operation, climbing, bucket truck operation, and rigging limbs shall be provided with sufficient training and experience to perform such duties while employed by Town of Cicero, whether in-house grounds maintenance, or a contractor employed by the Town.
- Only qualified utility arborists may perform tree removal operations within ten feet of an electric utility line.
- The Town will not remove healthy trees to meet diversity goals, unless the tree poses a risk to people or property.
- The Town shall not perform or assist, programmatically or financially, with the removal of trees on private property. Public tree ownership is defined as having 51% or greater of its trunk diameter on Town property. Limbs overhanging Town property may be pruned back to the property line with adjacent properties.

TREE PRUNING

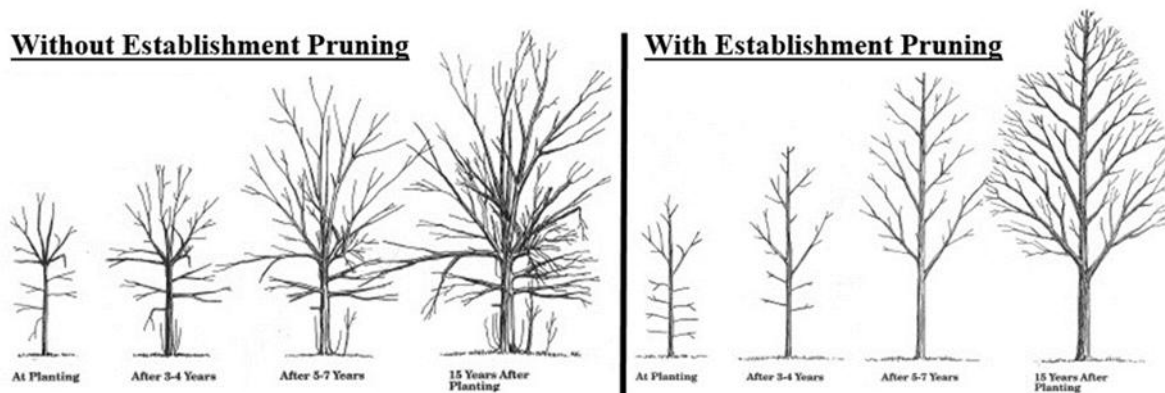
Tree pruning is one of the most cost-effective maintenance activities which can be performed to maintain a tree population for its greatest benefits and lowest risk. Pruning provides several important services for trees by reducing the risk of failure, providing clearance for utilities or other structures, reducing wind resistance and wind damage, maintaining overall tree health, and improving overall aesthetics.

Though tree pruning may seem expensive, the cost of maintaining trees is significantly less than the costs associated with trees damaging property or injuring residents or patrons. The benefits trees provide when healthy and well maintained can be prolonged and significantly increased. A cycle pruning program is the hallmark of an effective forestry program, and it is highly recommended that Cicero plan to increase budgets for this essential expense.

Reasons for Pruning

Establishment Pruning

Establishment pruning of newly planted trees is the single most cost-saving measure in tree care, as it establishes good form and branch structure for the life of the tree. Establishment pruning should be performed at a minimum of one time prior to the tree reaching six inches in diameter. Once established, the tree will only require periodic cycle pruning to maintain an appropriate form for the urban forest and to maintain health and keep the tree free of dead limbs.



Cycle Pruning

A Best Management Practice in urban forestry is that trees should be pruned on a cyclical basis as preventative maintenance. No tree should go more than seven years without proper pruning. Cycle pruning ensures that dead branches, storm damaged limbs, or unsightly growth are removed before becoming hazardous or bad for the health of the tree. Cyclical pruning also ensures the proper leaf to stem ratio, which provides structural support for the tree. It also ensures that pruning stays relatively inexpensive, as severe issues do not have time to develop. Cycle pruning is a maintenance activity that, if performed regularly, ends up needing to be performed less often.

Emergency / Storm Damage Pruning

Emergency pruning is nearly always necessary to mitigate severe risk after storm events, such as limbs which have fallen and are blocking traffic, have impacted a structure or playground, are interfering with a utility, or are hanging and in imminent danger of doing any of the above. Emergency and storm damage pruning should be conducted at the discretion of the Town, with the best interests of the public in mind. This is one of the few occasions on which the recommendations of this Plan may be temporarily suspended. When life and property are in imminent danger due to conditions associated with a downed tree or tree part, the Town may take whatever remedial action is practical and reasonable to mitigate such imminent risk.

Sanitation Pruning

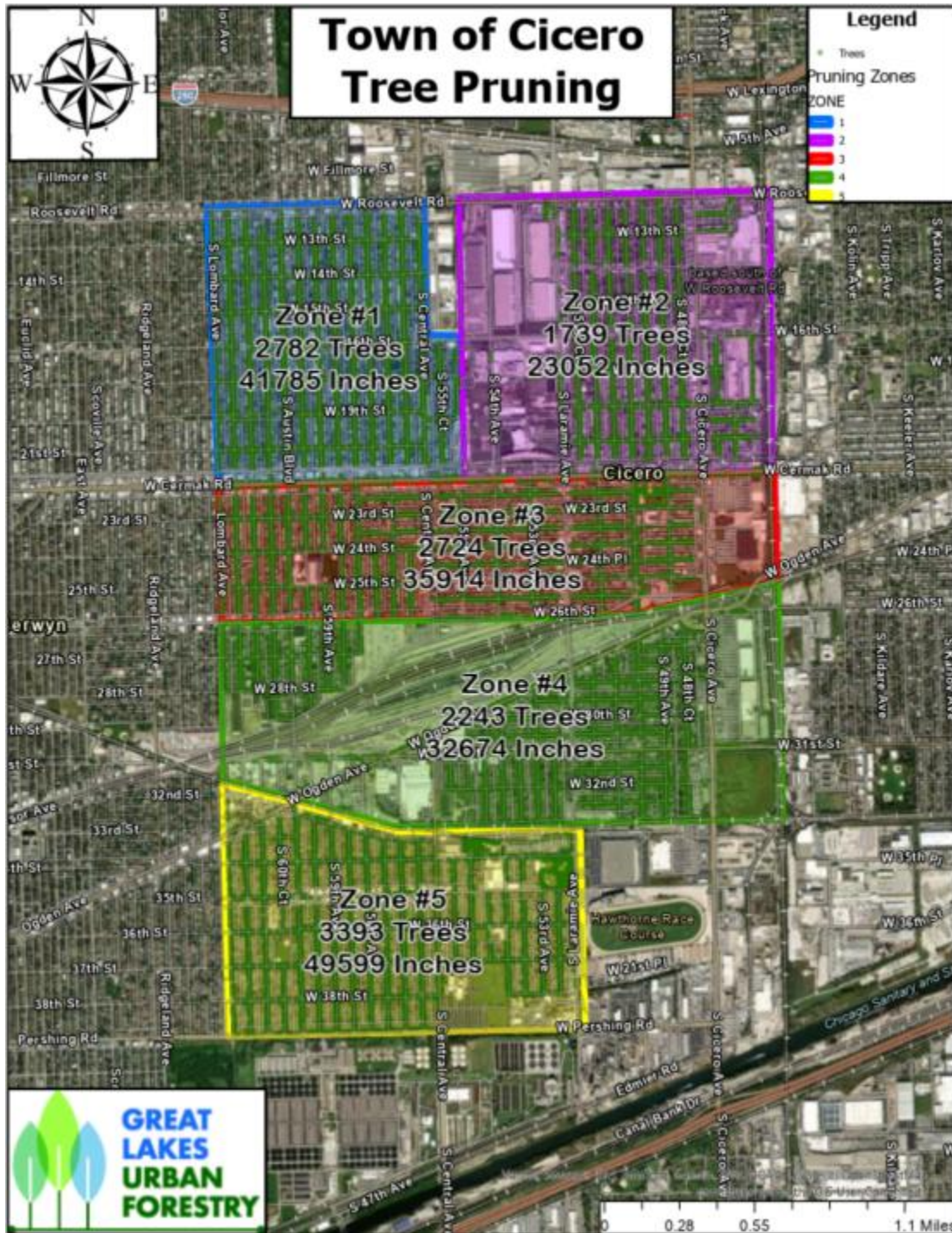
When a tree has been diagnosed as having been diseased or infested with a pest or disease, sanitation pruning may be employed to maintain the tree while removing the diseased or infested portions. This technique is only effective when the host tree is infected/infested with certain pests and pathogens, and only in a localized area of the tree. With more widespread cases of disease or insect infestation, removal may be the most cost-effective and safest option to avoid endangering other nearby trees, as these pests and diseases tend to spread, particularly when there are more of the same species nearby.

Removal of High-Risk Limbs

At times, a tree may not pose a high risk, but a single limb may have defects that make it hazardous. At these times, the removal of such limbs or parts may render the tree to be low risk again, without causing permanent damage to the tree.

Implementing the Pruning Plan

The most critical pruning needs of the Town of Cicero were prioritized. This priority list begins with trees identified as Priority Pruning and Dead Limb pruning. During the inventory, 1,477 such trees were identified, and the schedule of this plan is to prune these in the first and second years of the plan. The next priority to be completed in the fourth year of the plan is to begin establishment pruning of all newly planted trees by the third year after planting. This establishment pruning will be an annual in-house maintenance item. In the fourth year of the plan the annual cycle pruning by a contractor of an average of 1,282 trees per year can be implemented. This cycle covers the pruning of all trees over 12" DBH in the inventory over a five-year cycle apportioned according to the following map. This pruning cycle will begin in the fourth year of the plan.



Cycle Pruning Schedule

The tree data on this map shows all trees in each zone, not just those over 12". Since young trees 12" and less in diameter are easy to prune, it is assumed that Cicero staff can prune the half of the tree population that are less than 12"; the cost for this is not separated as an additional

budgetary expense except for the cost of staff training. If the Town chooses to contract this work out, \$40/tree can be used for budgeting the pruning of 6,600 trees. For medium (12"-24") and large (24"+) trees, average figures of \$75 and \$150 per tree (respectively) were used in the budget calculations, based on average cost in the industry. An average cost of \$112 has been used for each of the 1,282 trees over 12" per year to be pruned by a contractor. The budget also assumes that the tree removal recommendations are followed and the removed trees are not included in the pruning schedule. Consistent with other budget tables, a 3% annual CPI increase was added after the first 5 years.

Town of Cicero Internal Policies

- All full-time staff involved in tree care shall receive chainsaw training. All contractual work is done under supervision of a certified arborist.
- No pruning or maintenance activity on a tree that is within ten feet of a power transmission line shall be performed by a Town employee.
- No heading, pollarding or espalier pruning shall be conducted on Cicero-owned trees, and no wound dressings shall be used under any circumstances, without prior approval of Town of Cicero.
- The need for pruning and maintenance of individual trees shall be at the discretion of Town staff and/or the forestry consultant.
- No more than 25% of a tree's crown shall be removed during pruning operations to preserve the health of the tree. Any more than 25% of the crown being removed puts the tree in danger of severe dieback, and removal should be considered at that point.

Private Property Trees

Town of Cicero shall not be responsible for the pruning of trees located on private property. The Town reserves the right to prune portions of trees overhanging their property back to the adjacent property line, but is under no obligation to do so, and will perform such pruning at the discretion of Town staff and/or the Forestry Consultant.

TREE PLANTING

Whereas tree removal and pruning are necessary to promote public safety, planting of new trees must occur to increase diversity and canopy cover. This plan recommends planting 3,000 trees over the coming 10 years. These trees will be planted by Town staff or contractors. Costs have been estimated using containerized and/or balled and burlapped 2" trees; \$400 per tree (installed) has been used. This is a conservative estimate based on retail costs, and the Town will be likely be able to execute planting at a more favorable rate.



The Importance of the Right Tree in the Right Site

Urban forestry has an unfortunate history of not planning carefully for tree planting. Whatever was readily available, inexpensive, urban tolerant, and grew fast was seen as desirable, and often the planning of tree plantings was left to developers, nurseries or landscapers. With our history of invasive insects and diseases in the Midwest region and knowing these will only get worse in the future, it is more crucial than ever to have a process for planning tree plantings.

This process involves assessing each site to be planted in much the same way we would assess a tree, except that in this case, we look for factors such as available above and below ground growing space, how much light the site receives, amount of soil moisture present, and possibly other factors such as soil pH and texture. Once this information is collected, planting sites can be matched with trees which are well suited to those sites. Matching the right tree to the right site will result in trees which establish faster, grow more vigorously, live longer, and provide far greater benefits. Even a simpler version of this process is better than nothing.

Playing an active role in tree planting planning also allows for meeting diversity standards such as the taxonomic, spatial, and age class diversity principles outlined above, and attempts to get the tree population into compliance with the "20-10-5 Rule". Being targeted about species selection also allows the use of species that are slightly more difficult to find appropriate sites for. Species that are considered less urban tolerant can still be planted when the appropriate site is found.

The success of a tree depends on where and how it is planted. Town staff or the urban forestry consultant should assess planting sites before trees are purchased and installed each year, to

ensure the correct tree is being planted for the correct site. Each tree planted represents a decades-long commitment, and this planning helps to increase the benefits to the community from this commitment. A list of acceptable species to be planted appears in Appendix A.

Nursery Stock Procurement

Nursery stock quality is another aspect of planning which can help a tree establish, survive, and thrive to provide great benefits to the community. Town staff or the urban forestry consultant should inspect and select every tree which is to be planted on property to minimize the possibility of installing lower quality nursery stock. Specifications should be for material no smaller than 1.75" caliper, with good form for the species, planted as either balled and burlapped or minimum 5-gallon size containerized stock.

Currently, the nursery industry is recovering from a nursery stock shortage due to high demand to replace Ash trees lost to Emerald Ash Borer, which impacted the availability of some species. It is preferable to not accept substitutions in the requested species lists, as many nurseries may still attempt to substitute overplanted trees for some of the higher diversity species which may still be difficult to obtain. It is recommended to have an approved substitution prepared for each requested tree species. A list of species and acceptable substitutes has been included in Appendix B.

Tree Transport and Planting

Proper transport and planting procedures determine a tree's success after planting. Even healthy trees from the field, if improperly transported, may dry out during transport or suffer structural damage to root balls.

Trees planted too deeply will suffer from root compaction and trunk decay. Trees planted without properly dug holes may suffer from stunting. Trees planted without proper removal of packaging materials may develop girdling roots. Trees planted too high may have surface root desiccation. Trees improperly staked or with improper trunk protection may suffer from trunk wounds or girdling of the entire trunk. The standards and Best Management Practices for tree transport and planting are detailed in Appendix J. Trees may be planted by a local volunteer work force if the workers have been adequately trained by the forestry consultant or other local qualified organization prior to planting, and trees are of a smaller size such as containerized stock.

Tree Spacing and Visibility Requirements

Minimum tree spacing between large, medium, or small sized deciduous shade trees should be appropriate for the species and conform to any local standards. It is generally recommended this be no less than 40 feet between plantings, with some exceptions for smaller trees. This will allow trees to grow to their full potential without heavy competition for water and nutrients with neighboring trees, and without limited space for crown growth.

Watering

Watering of newly planted trees is essential to their establishment, growth, and survival, particularly for at least the first two years of their lives. Use of in-house labor and equipment, versus contracting out this work, is recommended to keep costs down.

Challenges of Urban Plantings

Urban planting sites are a difficult environment for a tree to thrive in, and based on long term data, it is expected that 5-10% of new plantings fail each planting cycle. The Town's contracts for tree planting should include a one to two-year replacement warranty for any new trees that fail to thrive in their new environment. Urban tree plantings can face an uphill battle in many ways, due to limited soil volume, salt runoff, airborne pollutants, and other factors. New planting mortality is to be expected, despite best efforts to prevent such an outcome, but the planning measures outlined above will help to mitigate annual new planting mortality.

Town of Cicero Internal Policies

- Planting sites shall be determined and monitored using the Town's tree inventory, in conjunction with staff and forestry consultant input.
- New planting sites should be 10 feet away from signage, driveways, intersections, and utility structures. If this distance cannot be maintained, the site should not be planted, even if a tree was removed from the same site.
- Choice of species for planting should be made according to the Town's taxonomic, spatial, and age-class diversity goals. A diverse and resilient urban forest minimizes exposure to financial, environmental, and health risks while maximizing aesthetics, environmental benefits, and ecosystem services to its residents and patrons.
- All planting stock shall be grown within 150 miles of the Town of Cicero.
- Acceptable nursery stock shall conform to the following standards:
 - Minimum of 1.75 inch caliper, measured at six inches from the trunk flare.
 - Root ball conforms to ANSI Z60.1 Standards for Nursery Stock.
 - Less than 10% deadwood in the crown.
 - Architecture consistent for the species, cultivar, or variety in question.
 - No included bark or other such narrow branch attachments, unless consistent with species or variety.
 - Free of pests or pathogens.
 - On the approved species list for Town of Cicero.
- Planting and digging of certain species shall only occur at certain times of year, in accordance with nursery industry best management practices and professional judgement. These times are subject to the professional opinions of both staff and its contractors.

- JULIE, or another similar utility locating service, shall be contacted, and all utilities located a minimum of three days before planting is scheduled to begin.
- A minimum of a one-year replacement guarantee shall be extended from approved nurseries and plantsmen for all new plantings rated to hardiness zone five or lower.

TREE RISK ASSESSMENTS

Trees provide ecosystem and aesthetic benefits, but all trees also pose some degree of risk. Determining the acceptable level of risk, along with effectively managing that risk, is a key priority for urban forestry operations. As a tree manager, the Town of Cicero must always assume some degree of risk. It is up to the Town to track that risk to ultimately decide how to take steps to mitigate trees which pose such risk in a manner which is responsible both economically as well as in the interest of public safety.

Levels of Risk Assessment – An Overview

These Risk Assessment Levels are based on the International Society of Arboriculture's (ISA) Tree Risk Assessment Qualification (TRAQ) protocols, as well as the ANSI A300 Part 9 (Tree Risk Assessment) Standards. The TRAQ forms can be found in Appendix H at the end of this report. All trees in Cicero were assessed for a basic level of risk during the inventory. These assessments were rapid assessments, and do not represent any formal level of TRAQ risk assessment and are not legally binding. They are intended to provide Cicero with data showing a need for a more detailed assessment of individual trees such as those listed below.

A Level 1 Assessment, also called a "limited visual assessment", is a basic analysis of obvious physical tree defects and condition. The assessor walks or drives by the tree, assesses it quickly for defects, evaluates the risk posed by the subject tree, and reports the results of the assessment to the tree owner. Often, prior to a recommendation, a more detailed Level 2 or Level 3 assessment will be required to gather additional data.

A Level 2 Assessment, also called a "basic assessment", is a report detailing the information collected during a detailed visual inspection of the tree and the surrounding site. Such an inspection requires a 360 degree walk around, and may include the use of simple tools, such as binoculars, magnifying lenses, mallets, probes, and trowels or shovels. The goal is to get a more complete picture of the tree in its environment, as well as previous histories of failures, and a root to branch evaluation of not only the tree but also potential "targets" which falling trees or tree parts may impact. Targets are structures, people, vehicles, or other things which may be damaged or injured by trees.

A Level 3 Assessment, also called an "advanced assessment", provides detailed information about specific tree parts, targets, and risk associated with each potential interaction. It requires specialized equipment such as bucket trucks, resistance drills, sonic tomographs, and other such equipment. This is the most detailed and time-intensive type of assessment, and is typically only performed when a decision to retain or remove a tree is very difficult, as would be the case

for a high quality tree near a potential target that has significant defects, the extent of which are not known, but must become known before making a decision.

Tree Risk Policy and Procedures

A sample Tree Risk Policy and Procedures is given in Appendix H.

Tree Risk Policy Outline

1. The Tree Risk Management Policy should state that the municipality:
 - a. Has responsibility for the care and maintenance of municipal trees.
 - b. Must balance the benefits of the urban forest against the potential risks that trees may pose people and property.
 - c. Intends to make reasonable efforts to identify and manage tree risk.
 - d. Will make risk mitigation decisions based on the risk levels found, level of acceptable risk, budget constraints, and other factors that affect work priorities.

2. The Policy Statement formalizes that the municipality will:
 - a. Identify trees owned and/or maintained by the municipality.
 - b. Assess potential risk from these trees.
 - c. Utilize current professional standards and BMPs for risk assessments.
 - d. Prioritize identified risk.
 - e. Identify risk mitigation options.
 - f. Create a risk mitigation plan.
 - g. Implement plan.

Tree Risk Management Procedures Outline

1. Define municipal/district-maintained trees
 - a. In an up-to-date comprehensive tree inventory, and/or
 - b. By ordinance defining who maintains ROW trees or
 - c. As all trees on defined owned/leased/managed property

2. Specify how risk will be identified
 - a. Identify the professional standards and BMPs that are to be used
 - i. *ANSI A300 Part 9: Risk Assessment*
 - ii. *International Society of Arboriculture's (ISA) Best Management Practices: Tree Risk Assessment*
 - iii. Other?
 - b. What Risk Assessment methodology will be utilized
 - i. Level 1 Limited Visual Tree Risk Assessment: a visual assessment from one or more sides of a tree looking for obvious defects. Used to quickly assess individual trees or populations of trees.
 - ii. Level 2 Basic Assessment: a detailed visual assessment of a tree and the surrounding site. Simple tools may be used. Used on individual trees.

- iii. Level 3 Advanced Assessment: a detailed assessment using specialized tools and techniques on individual trees.
- c. Who conducts Risk Assessments
 - i. Employees or contractors that hold an ISA Tree Risk Assessment Qualification (TRAQ) or have sufficient professional experience in lieu thereof can conduct Level 1 Assessments.
 - ii. Only TRAQ Arborists will conduct Level 2 and 3 Assessments.
- d. How will assessment findings be reported
 - i. Level 1, 2 and 3 Assessment findings will be formalized in written reports by the assessor and submitted to (City Manager, PW Director, etc.)
 - ii. Level 1 trees with defects will be GPS located with species, size, description of defect(s) and recommended maintenance.
 - iii. Levels 2 and 3 will follow ISA *Best Management Practices: Tree Risk Assessment* and *ANSI A300 Part 9: Risk Assessment* protocols, creating a written report using the ISA Form below, producing a *Risk Rating* for the individual tree. This rating is derived using the following ISA BMP Risk Rating Matrices:

Likelihood of Tree Failure Impacting Target

Likelihood of Failure	Likelihood of Impacting Target			
	Very Low	Low	Medium	High
Imminent	Unlikely	Somewhat Likely	Likely	Very Likely
Probable	Unlikely	Unlikely	Somewhat Likely	Likely
Possible	Unlikely	Unlikely	Unlikely	Somewhat Likely
Improbable	Unlikely	Unlikely	Unlikely	Unlikely

Risk Rating Matrix

Likelihood of Failure and Impact	Consequences			
	Negligible	Minor	Significant	Severe
Very Likely	Low	Moderate	High	Extreme
Likely	Low	Moderate	High	High
Somewhat Likely	Low	Low	Moderate	Moderate
Unlikely	Low	Low	Low	Low

1. Define how often assessments are conducted
 - a. Level 1 Assessments are used as a screening process to find higher risk trees and are conducted “periodically” or, may be defined more specifically, i.e., every year, every other year or every three or more years on all agency trees of a defined size (such as “all trees over 12” dbh”). Determine your standard. These assessments can also be a part of the agency’s tree inventory process.
 - b. Level 1 Assessments may need to be conducted after certain extreme weather events to identify broken and damaged trees and limbs. Define the timeframe of assessments from the end of the storm event.
 - c. Municipal/district staff will, in the course of their duties, note any possible tree defects and report any trees of concern to their supervisor. These will be reported to the (City Forester, Public Works Director, etc.) within (specified timeframe).
 - d. Level 2 and 3 Assessments will be conducted as needed on trees where there is a strong desire to keep the tree due to its high ecological quality, historical

importance, or location value, but more data is required to determine the severity of the defect.

- e. Level 1, 2 or 3 Assessments should be conducted within (specified timeframe) of a report from the public or a report from municipal/district staff of potential tree risk.

2. Specify how Risk will be mitigated

- a. Based on the Level 1, 2 and 3 Assessment findings, the (City Forester, Arborist, Public Works Director, etc.) will then create prioritized risk mitigation options that may be utilized to reduce or eliminate those risks. (May elaborate on agency's methods.)
- b. If a Level 1 Assessment finds a tree with an imminent risk of failure and there is potential for injury to staff or the public, the (specify staff) will restrict access to the target zone of the tree or tree part and take action **as soon as possible** to mitigate or eliminate the risk through pruning, removal or other means.
- c. Other potential elevated levels of tree risk found in the Level 1 Assessment may require pruning, cabling, bracing, removal or other means **as soon as practical** after the assessment.
- d. If the Level 2 and 3 Assessments find any trees with an "Extreme" Risk Rating, the (specify staff) will restrict access to the target zone of the tree or tree part and the (City Forester, Arborist, Public Works Director, etc.) will act **as soon as possible** to mitigate the risk through pruning, removal or other means.
- e. If the Level 2 and 3 Assessments find any trees with a "High" Risk Rating, the (City Forester, Arborist, Public Works Director, etc.) will implement risk mitigation measures through pruning, cabling, bracing, removal or other means **as soon as practical** after the assessment.
- f. "Moderate" Risk Rated trees may be mitigated and/or retained and monitored. Mitigation measures may be scheduled as budgets and time allow. These trees may be monitored over months or even years.
- g. "Low" Risk Rated trees may not require any mitigation and may be retained (if desired) and monitored.

GENERAL MAINTENANCE

Retaining a Consultant

The task of establishing or enhancing a robust urban forestry program can be difficult. There may be many new challenges and learning curves, contracts to renegotiate, bid documents to create, resident concerns to manage, and other responsibilities which may require the assistance of a professional. The forestry consultant may be involved in sourcing and interviewing contractors and vendors for tree pruning, removal, and planting operations, assisting in maintaining the tree inventory, training staff on tree health and risk assessments, assisting in explaining policies to residents and patrons, and preparing contract and bid specifications. The importance of this early relationship cannot be overstated, no matter how large or small the organization.

Chemical Applications

Trees, like people, sometimes contract pests and pathogens. Often these pests and pathogens can be controlled with a simple chemical application just as illnesses in humans can be controlled with medication. This practice is called plant health care. When financially practical, chemical control for common pests or pathogens may be utilized as a preventative or curative method and increase the aesthetics and benefits of the tree population.

The Town, at its discretion, may opt to perform chemical treatments if it is environmentally and economically responsible. At present, the Town currently uses a contractor to treat trees for various pests and pathogens when needed. Treatments performed by Cicero on its own trees must be performed by a certified arborist who holds a valid Pesticide Applicators license. Residents of Cicero may not perform chemical applications on any Town-owned trees under any circumstances.

Water Management

The importance of water in the establishment, growth, and survivorship of trees cannot be overstated. Most trees adapted to our climate zone (USDA Zone 5b) are also adapted to the amount of moisture we have in an average year. However, younger trees with less expansive root systems are susceptible to prolonged drought. Young trees need supplemental watering, which is an essential maintenance activity and can prevent newly planted tree mortality.

As we anticipate approximately 3000 additional trees being planted over the course of the next 10 years, this concept becomes very important. The watering program is to be performed by in-house staff, but an outside contractor can also be used. If contracted, a general rule would be to expect to pay somewhere on the order of \$50 to water a tree several times throughout the first two growing seasons after planting. Planting 3000 trees per year, there would be 600 trees requiring water at any given time, for a total cost of around \$30,000 each year, if contracted. Of course, these numbers can be highly variable.

Mulch

Proper application of mulch is a necessary and cost-effective maintenance activity. Mulch has many benefits, including reducing weed growth in the root zone, protecting the tree trunk and root flare from lawn maintenance equipment, allowing water to move into the soil, reducing evaporation and drought stress, and creating a naturally fertile soil environment. Turfgrass competes for water and nutrients, and mulch reduces this competition. Not all mulching is beneficial. The practice known as “volcano mulching” is the practice of piling mulch against the trunk more than 3” deep. This causes moisture build-up against the trunk, and can cause decay of the trunk tissue, and possibly death. Material such as crushed limestone, red volcanic rock, or rubber pellets can alter the soil chemistry in an undesirable way, and cause dieback or tree death.

All newly planted trees should have mulch applied appropriately. Ideally, Cicero should mulch all trees 12” DBH and smaller, but for now, mulch all newly planted trees, and preventing volcano mulching should be a primary concern.

Tree Preservation and Management During Construction

In many municipalities, ordinances exist to protect trees and shrubs from construction activities. The intent of these ordinances is to protect the benefits that those trees and shrubs provide to the community. Trees and shrubs may be privately owned but are also community resources that provide benefits such as aesthetics, storm water benefits, energy savings, carbon sequestration and increased property values. Therefore, tree and shrub protection and preservation during construction represents an investment in the community. Ensuring the protection and preservation of these trees while minimizing burdens to businesses, developers, and residents is essential to a healthy urban forest. Tree protection and preservation during periods of construction involves protecting trees from damage caused by construction activities. This damage includes physical and chemical damage to the trunk, branches, and roots. Damage may be caused by equipment such as vehicles, backhoes, skid steers, or other construction equipment. The effects of damage to the visible above ground portions of the tree can be obvious, as when branches are broken. But hidden effects such as root compaction or improper grading may not become evident for years until the tree begins to die back. The tree protection detail in Appendix G and the standards set forth in Appendix L are industry criteria with a proven record of success.

SUMMARY / CONCLUSION

By creating this Urban Forestry Management Plan, the Town of Cicero has taken an important step in investing in the urban forest's future by creating both short and long term goals that will serve as milestones to guide the Town in the management of their urban forest. These are goals that, as they are undertaken, will help strengthen the urban forestry program in Cicero, maximizing the benefits that trees provide to the community and minimizing cost and risk. The Town of Cicero thanks its residents, stakeholders, grant funding organizations and consultants that have made this endeavor possible. It has been a pleasure to work with all involved as the Town looks toward its future urban forestry endeavors.



APPENDIX A: Acceptable and Unacceptable Species

Species not appearing on this list can be approved or disallowed by consensus of the Director of Public Works or Cicero Board of Trustees from recommendations of Town staff and/or the Forestry Consultant.

NOT APPROVED	APPROVED SPECIES			
Any Size	Large Trees	Medium Trees	Small Trees	Evergreens
AILANTHUS	BALDCYPRESS	ALDER	AMERICAN REDBUD	ARBOR VITAE
AMUR CORKTREE	BEECH-AMERICAN	AMUR MAACKIA	APPLE-CRAB	DOUGLAS FIR
ASH-EUROPEAN	BEECH-EUROPEAN	BIRCH-RIVER	APPLE-EDIBLE	EASTERN REDCEDAR
ASH-GREEN	BUCKEYE-OHIO	BIRCH-WHITE	BUCKEYE-RED	FIR-CONCOLOR
ASH-WHITE	BUCKEYE-YELLOW	BLACKGUM	CHERRY-ORNAMENTAL	HEMLOCK-SPP
BOXELDER	CATALPA	ELM-CHINESE	DOGWOOD-SPP	JUNIPER-COMMON
BUCKTHORN	CHESTNUT-CHINESE	HARDY RUBBER TREE	HAWTHORN-COCKSPUR	PINE-AUSTRIAN
BURNING BUSH	DAWN REDWOOD	HAZELNUT-TURKISH	HAWTHORN-SPP	PINE-MUGO
CHERRY-BLACK/PIN	ELM-HYBRID	HORNBEAM-AMERICAN	HYDRANGEA-PEEGEE	PINE-WHITE
COTTONWOOD	GINKGO*	HORNBEAM-EUROPEAN	LILAC-SHRUB	SPRUCE-BLUE
ELM-AMERICAN	HACKBERRY	IRONWOOD	LILAC-TREE	SPRUCE-NORWAY
ELM-SIBERIAN	HICKORY-SPP	KATSURA	MAGNOLIA-SAUCCER	SPRUCE-SPP
HONEYSUCKLE	HONEYLOCUST	MAPLE-HEDGE	MAPLE-AMUR	YEW
MAPLE-NORWAY	HORSECHESTNUT	MAPLE-MIYABEI	MAPLE-JAPANESE	
MAPLE-SILVER	KENTUCKY COFFEETREE*	MAPLE-PAPERBARK	PEACH/NECTARINE	
MULBERRY-SPP	LARCH	MAPLE-SHANTUNG	PLUM-SPP	
PEAR-CALLERY	LINDEN-AMERICAN	MAPLE-TRIFLORUM	ROSE OF SHARON	
POPLAR-SPP	LINDEN-LITTLELEAF	OAK-CHINKQUAPIN	SERVICEBERRY-SPP	
POPLAR-WHITE	LONDON PLANETREE	OAK-ENGLISH	SMOKETREE	
PRINCESS TREE	MAGNOLIA-CUCUMBER	OAK-SHINGLE	WITCH HAZEL	
RUSSIAN OLIVE	MAPLE-SUGAR	PERSIAN IRONWOOD		
WALNUT-ANY	OAK-BLACK	YELLOWWOOD		
	OAK-BURR	GOLDEN RAIN TREE		
	OAK-PIN	MOUNTAIN ASH		
	OAK-RED	PEAR-EDIBLE		
	OAK-SWAMP WHITE	SASSAFRASS		
	OAK-WHITE	SEVENTH SON FLOWER		
	PAGODATREE			
	PERSIMMON			
	SWEETGUM			
	SYCAMORE			
	TULIPTREE			
	ZELKOVA			

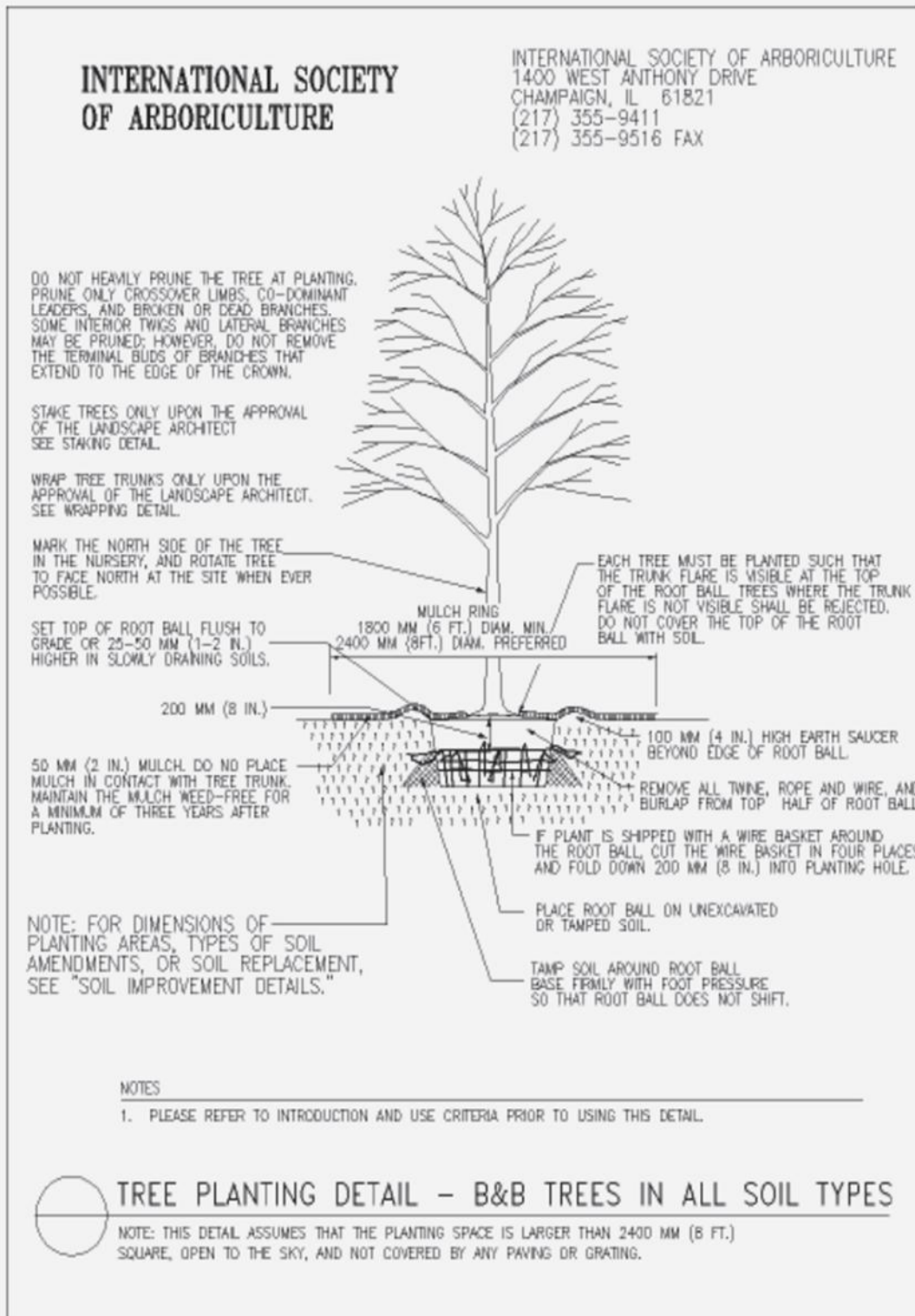
Appendix B: Additional Comments on Species

SPECIES	COMMENTS	SPECIES	COMMENTS
ALANTHUS	NOT APPROVED	LILAC-SHRUB	Parks Only
ALDER-SPP		LILAC-TREE	Improved varieties, tree form only
AMERICAN HORNBEAM		LINDEN-AMERICAN	
AMERICAN REDBUD		LINDEN-LITTLELEAF	
AMUR MAACKIA		LINDEN-SILVER	
APPLE-CRAB SPP	Apple Scab resistant varieties only	LINDEN-SPP	
APPLE-EDIBLE	Parks Only	LONDON PLANETREE	Prefer 'Exclamation!', 'Bloodgood' not allowed
APRICOT	NOT APPROVED	MAGNOLIA-CUCUMBER	
ARBOR VITAE	Parks only	MAGNOLIA-SAUCCER	Scale resistant varieties only
ASH-BLUE	NOT APPROVED	MAGNOLIA-SHRUB	Star Magnolia or similar Magnolia pruned to tree form
ASH-GREEN	NOT APPROVED	MAPLE-AMUR	Parks only unless pruned to tree form
ASH-WHITE	NOT APPROVED	MAPLE-AUTUMN BLAZE	Or other similar Acer x freemannii
ASPEN	Improved varieties only	MAPLE-BLACK	
BALDCYPRESS	Prefer 'Shawnee Brave'	MAPLE-HEDGE	
BEECH-AMERICAN		MAPLE-JAPANESE	Small growing space only
BEECH-SPP	Prefer 'Tricolor' or 'Riversii'	MAPLE-MIYABEI	Prefer 'State Street'
BIRCH-RIVER	Prefer Single stem only	MAPLE-NORWAY	NOT APPROVED
BIRCH-SPP	Sweet Birch, Yellow Birch, or other newintroductions	MAPLE-PAPERBARK	
BIRCH-WHITE	Bronze Birch Borer resistant only, prefer 'Whitespire'	MAPLE-RED	Improved varieties only
BLACK LOCUST	Improved varieties only, prefer 'Purple Robe'	MAPLE-SILVER	NOT APPROVED
BLACKGUM		MAPLE-SUGAR	Prefer 'Green Mountain'
BOXELDER	NOT APPROVED	MOUNTAIN ASH	Improved varieties only
BUCKEYE-OHIO		MOUNTAIN ASH-EUROPEAN	Improved varieties only
BUCKEYE-RED	Prefer 'Ft. McNair' or Bottlebush	MULBERRY-SPP	NOT APPROVED
BUCKEYE-YELLOW		OAK-BURR	
BUCKTHORN	NOT APPROVED	OAK-CHESTNUT	
BURNING BUSH	NOT APPROVED	OAK-CHINKQUAPIN	
CAROLINA SILVERBELL	Protected sites only	OAK-ENGLISH	
CATALPA		OAK-PIN	
CHERRY-BLACK	NOT APPROVED	OAK-RED	
CHERRY-PURPLE LEAF		OAK-SWAMP WHITE	
CHERRY-SPP	Ornamental, Black Knot resistant varieties only	OAK-WHITE	
COTTONWOOD	NOT APPROVED	OTHER	Open for new introductions
DAWN REDWOOD		PAGODATREE	
DOGWOOD-SPP	Hardy varieties only	PEACH	Parks only
DOUGLAS FIR	Parks only	PEAR-CALLERY	NOT APPROVED
EASTERN REDCEDAR	Parks only	PEAR-EDIBLE	Parks Only
ELM-AMERICAN	NOT APPROVED	PERSIAN IRONWOOD	Medium growing space only
ELM-HYBRID	Hardy varieties only	PERSIMMON	American variety preferred (Diospyros virginiana)
ELM-RED	NOT APPROVED	PINE-AUSTRIAN	Parks Only
ELM-SIBERIAN	NOT APPROVED	PINE-SCOTCH	Parks only
ELM-SPP	New cultivar introductions	PINE-WHITE	Parks only
EUONYMUS	Eastern Wahoo ONLY no non-native varieties	PLUM-SPP	Parks Only
FIR-SPP	Parks only	PUSSYWILLOW	Parks only
FRINGETREE		ROSE OF SHARON	
GINKGO	Male only	SASSAFRAS	
GOLDEN RAINTREE		SERVICEBERRY-SPP	Prefer 'Autumn Brilliance'
HACKBERRY		SEVENTH SON FLOWER	
HARDY RUBBER TREE		SHRUB-SPP	Parks only, open for new introductions
HAWTHORN-SPP	Thornless varieties only	SMOKETREE	American variety preferred, small growing space only
HICKORY-BITTERNUT		SPRUCE-BLUE	Parks only
HICKORY-SHAGBARK		SPRUCE-NORWAY	Parks only
HONEYLOCUST	Prefer 'shademaster' or 'inermis'	SPRUCE-SPP	Parks only
HONEYSUCKLE	NOT APPROVED	SUMAC	Parks only
HORNBEAM-EUROPEAN		SWEETGUM	Prefer 'Happidaze'
HORSECHESTNUT		SYCAMORE	In natural areas only, London Planetree preferred
HYDRANGEA-PEGGEE		TULIPTREE	
IRONWOOD		VIBURNUM	Tree form only
JUNIPER-COMMON	Parks Only	WALNUT-BLACK	NOT APPROVED
KATSURA		WILLOW-SPP	NOT APPROVED
KENTUCKY COFFEETREE	Fruitless varieties only	YELLOWWOOD	
LARCH		YEW	Parks Only
		ZELKOVA	Prefer 'Green Vase'

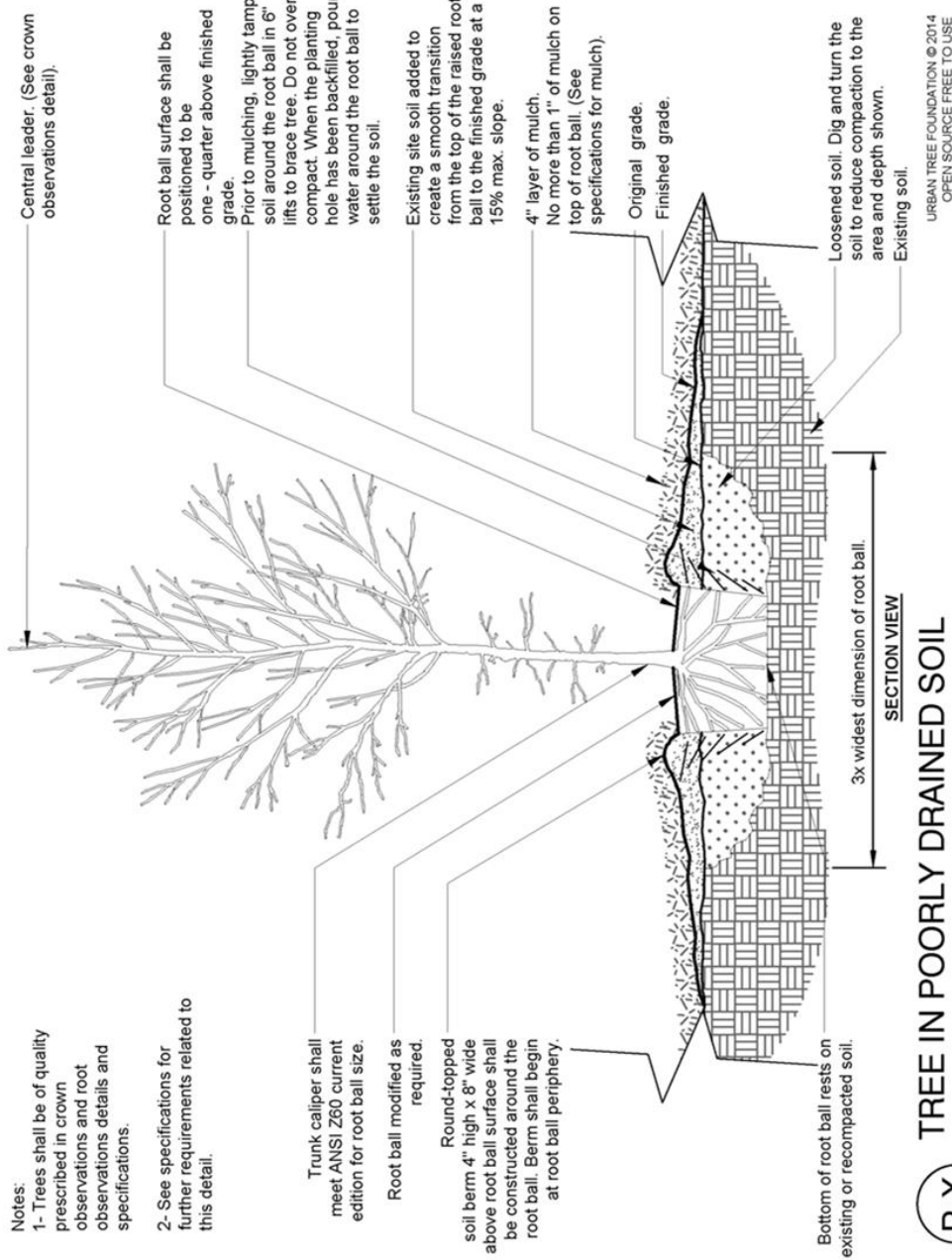
Appendix C: Species Substitutions

Species	Planting Time	Acceptable Substitutes
Alder, Black/Speckled	Spring	River Birch, Planetree
Amur Maackia	Spring	Yellowwood, Shingle Oak
Baldcypress	Spring	Larch, Dawn Redwood
Beech, European	Spring	Red Oak, Buckeye
Birch, River (Multi Stem)	Spring	Alder, Swamp White Oak
Birch, White	Spring	River Birch, Alder
Black Locust (Purple Robe)	Any	Honeylocust, Kentucky Coffeetree
Blackgum	Spring	Sweetgum, Dogwood
Buckeye, Ohio (Autumn Splendor)	Any	Horsechestnut, Catalpa
Buckeye, Red	Spring	Dogwood, Hawthorn
Buckeye, Yellow	Spring	Planetree, Sweetgum
Catalpa	Any	Kentucky Coffeetree, Tuliptree
Cherry, Sargent	Spring	Red Buckeye, Tree Lilac
Chestnut, Chinese	Spring	Turkish Hazelnut, Persimmon
Crabapple (Larger)	Any	Tree Lilac, Hawthorn
Dawn Redwood	Spring	Baldcypress, Larch
Dogwood, Cornelian	Spring	Tree Lilac, Hawthorn
Dogwood, Pagoda	Spring	Sargent Cherry, Smoketree
Douglas Fir	Spring	Concolor Fir, Spruce
Elm, Hybrid (Larger)	Any	Hackberry, Hardy Rubbertree
Fir, Concolor	Spring	Douglas Fir, Spruce
Ginkgo (Standard)	Any	Tuliptree, Catalpa
Golden Raintree	Spring	Katsura, Magnolia
Hackberry, Common	Any	Hybrid Elm, Hardy Rubbertree
Hardy Rubber Tree	Any	Tuliptree, Zelkova
Hawthorn, 'Inermis'	Any	Crab Apple, Dogwood
Hawthorn, Winterking	Any	Tree Lilac, Smoketree
Hazelnut, Turkish	Spring	Persimmon, Catalpa
Hickory, Bitternut	Spring	Oak spp, Beech spp
Hickory, Shagbark	Spring	Oak spp, Beech spp
Hornbeam, American	Spring	Ironwood, Hawthorn
Hornbeam, European (Columnar)	Spring	English Oak (columnar)
Horsechestnut (Baumani)	Any	Buckeye, Catalpa
Ironwood	Spring	American Hornbeam, Hawthorn
Katsura	Spring	Magnolia, Seventh Son Flower
Kentucky Coffeetree	Any	Honeylocust, Black Locust
Larch	Spring	Baldcypress, Dawn Redwood
Lilac, Japanese Ivory Silk	Any	Hawthorn, Sargent Cherry
Linden, Greenspire	Any	Kentucky Coffeetree, Hybrid Elm
Linden, Redmond	Any	Catalpa, Hackberry
Locust, Skyline	Any	Kentucky Coffeetree, Black locust
London Planetree	Spring	Sweetgum, Blackgum
Magnolia, Cucumber	Spring	Yellow Buckeye, Catalpa
Magnolia, Saucer	Spring	Persian Ironwood, Katsura
Magnolia, Star	Spring	Sargent Cherry, Smoketree
Maple, Autumn Blaze	Any	Black Maple, Shantung Maple
Maple, Black	Any	Shantung Maple, Autumn Blaze
Maple, Paperbark	Spring	Triflorum Maple, Tree Lilac
Maple, Shantung	Any	Sugar Maple, Miyabei Maple
Maple, Sugar	Any	Autumn Blaze, Shantung Maple
Maple, Triflorum	Spring	Paperbark Maple, Tree Lilac
Mountain Ash	Spring	Black Locust, Hawthorn
Oak, Burr	Spring	Shingle Oak, Swamp White Oak
Oak, English (Columnar)	Any	European Hornbeam
Oak, English (Standard)	Any	White Oak, Burr Oak
Oak, Red	Spring	Black Oak, Chinquapin Oak
Oak, Shingle	Spring	Chinquapin Oak, English Oak
Oak, Swamp White	Spring	London Planetree, Burr Oak
Oak, White	Spring	Burr Oak, English Oak
Oak, Chinquapin	Spring	Shingle Oak, Red Oak
Persian Ironwood	Spring	Seventh Son Flower, Katsura
Persimmon	Spring	Turkish Hazelnut, Zelkova
Pine, Limber	Spring	Spruce, Concolor Fir
Pine, Red	Spring	Douglas Fir, Eastern Redcedar
Poplar, Hybrid	Any	London Planetree, Baldcypress
Redbud	Any	Serviceberry, Hawthorn
Redcedar, Eastern	Spring	Spruce, Douglas Fir
Serviceberry	Any	Redbud, Tree Lilac
Seventh Son Flower	Spring	Persian Ironwood, Katsura
Smoketree	Spring	Magnolia, Seventh Son Flower
Sourwood	Spring	Blackgum, Sweetgum
Spruce, Black Hills	Spring	Eastern Redcedar, Concolor Fir
Spruce, Blue	Spring	Eastern Redcedar, Douglas Fir
Spruce, Norway	Spring	Eastern Redcedar, Concolor Fir
Spruce, Serbian	Spring	Eastern Redcedar, Douglas Fir
Sweetgum	Spring	Yellow Buckeye, Larch
Tuliptree	Any	Zelkova, Ginkgo
Yellowwood	Spring	Amur Maackia, Shingle Oak
Zelkova	Spring	Tuliptree, Ginkgo

Appendix D: Balled and Burlapped Planting Detail

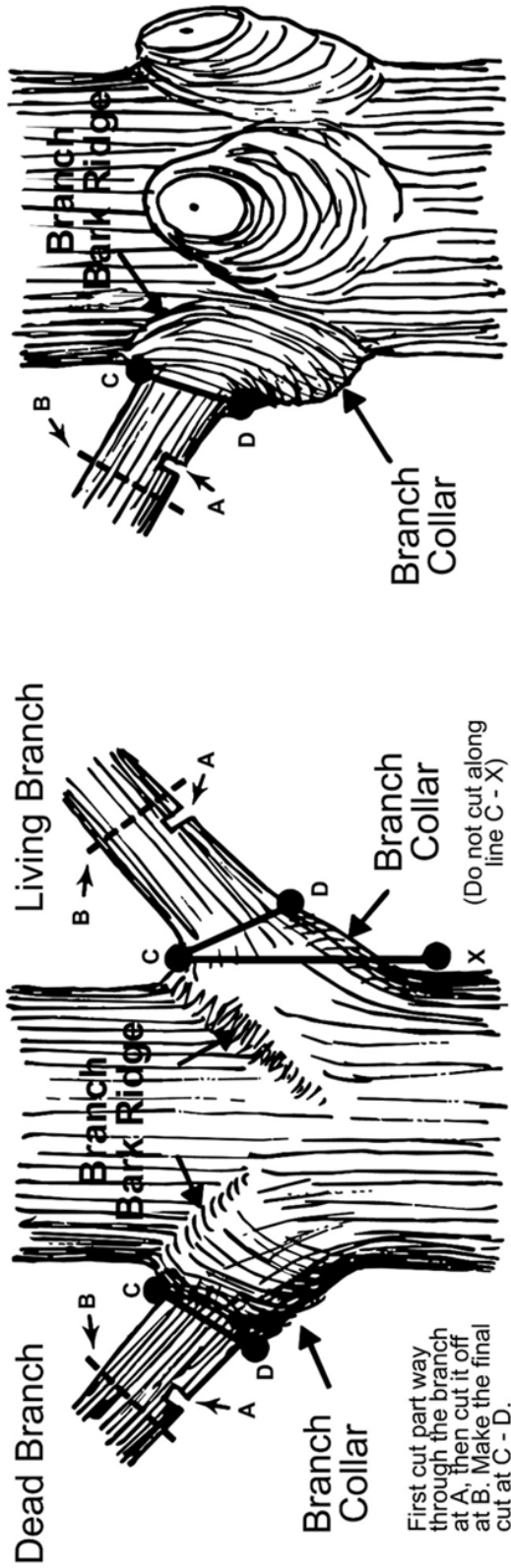


Appendix E: Containerized Planting Detail



Appendix F: Tree Pruning Detail

Proper Pruning Principles

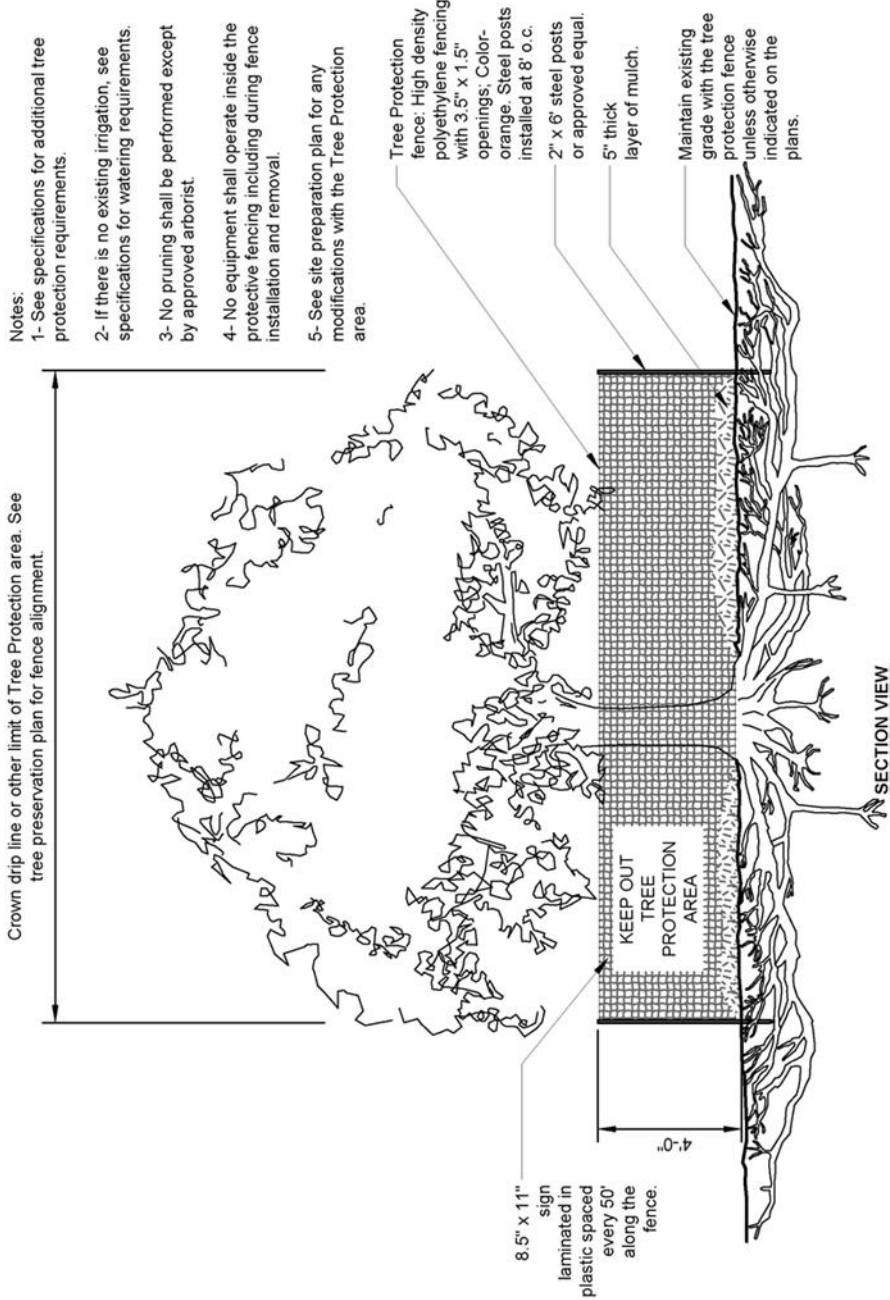


Hardwoods

Conifers



Appendix G: Tree Protection Detail



- Notes:
- 1- See specifications for additional tree protection requirements.
 - 2- If there is no existing irrigation, see specifications for watering requirements.
 - 3- No pruning shall be performed except by approved arborist.
 - 4- No equipment shall operate inside the protective fencing including during fence installation and removal.
 - 5- See site preparation plan for any modifications with the Tree Protection area.

S-X
TREE PROTECTION

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Appendix H: Sample Tree Risk Policy and Procedures, ISA Tree Risk Assessment Form (TRAQ Level 2-Basic)

SAMPLE Tree Risk Management Policies and Procedures

Tree Risk Management Policy

It is the intent of (municipality) to minimize risks posed from trees to people and property on its streets, right of ways, properties and facilities. Therefore, potential risks from trees owned and managed by (municipality) will be periodically identified by conducting tree risk assessments as defined by current professional standards and best management practices. The purpose of the assessments is to ensure that the (municipality) has, at the time of the assessments, made reasonable efforts to identify potential elevated risk and high-risk trees that are in their care.

The urban forest of (municipality) provides environmental, aesthetic and societal benefits to the community. The (municipality), in its role as property manager, is responsible for balancing the many benefits of the urban forest against the potential risks that trees may pose to people and property. To properly protect the (municipality) and its residents from potential risk, this policy has been created defining the intent to manage these risks.

Potential risks identified in the risk assessments will be prioritized, and risk mitigation options will be identified for the (municipality) to create and implement a management plan to mitigate those risks. (municipality) will make reasonable risk mitigation decisions based on the risk levels found, level of acceptable risk, budget constraints, and other factors that affect work priorities.

Tree Risk Management Procedures

To manage potential risk in their tree population, (municipality) will implement the Tree Risk Management Policy by utilizing the following Tree Risk Management Procedures:

Identification of Potential Tree Risk

1. The (Director of ---) will periodically have a Level 1 Limited Visual Tree Risk Assessment conducted, as defined in the International Society of Arboriculture's (ISA) *Best Management Practices: Tree Risk Assessment* and *ANSI A300 Part 9: Risk Assessment*, on all trees greater than 10 inches diameter breast height (dbh) within maintained municipal right of ways and municipal owned properties. Trees or parts of trees in unmaintained areas that could fall onto streets, buildings, structures, parking lots, drives, maintained municipal areas and trail systems will also be a part of the assessment. Dead or broken limbs under 3" in diameter will not be a part of the assessment.
2. The Level 1 Assessment should be conducted:
 - a. During the periodic (municipality)-wide tree inventory that details the species, size, and condition of all trees on (municipality) owned land, including a basic level of risk posed by each tree. The trees listed as being in elevated risk categories during the inventory will be audited by qualified (municipality) staff and/or a forestry consultant who should inspect these trees and identify trees potentially posing an unacceptable level of risk. Such trees

identified should either be scheduled for a more detailed risk assessment (Level 2 or 3), or be mitigated, either by pruning, cabling, bracing, removal, or other treatment.

- b. When ISA Tree Risk Assessment Qualified (TRAQ) arborists are inspecting (municipality)'s urban forest to identify those trees having an imminent or a probable likelihood for structural failure, i.e. trees or limbs breaking and falling.
 - c. In the aftermath of extreme weather events. Every tree, no matter how healthy, can fail from high wind velocity, excessive loads from snow or ice, and other factors such as lightning strikes and soil saturation. Typical weather for northern Illinois can cause tree failures or tree part failures for trees which have preexisting defects. Extreme weather events can cause the failure of healthy trees with no defects.
 - d. Upon notification of a concern about a potentially high-risk tree from a resident, a business, or from staff, (municipality) will have qualified staff and/or the urban forestry consultant perform a Level 1 limited visual inspection within (14) business days of the notification. If a Level 2 or Level 3 Risk Assessment is required based on that inspection, it should be performed within an additional (14) business days.
3. (municipality) staff may, in the course of their duties, inspect for possible tree defects and report any trees of concern to their supervisor.
 4. The purpose of the Level 1 Assessment and/or tree inventory is to ensure that (municipality) has, at the time of the assessment, made reasonable efforts to identify potential elevated risk and high-risk trees that are in their care.
 5. Trees found with significant defects will be GPS or otherwise located with a brief description of the defect(s) found.
 6. Trees will be considered for a higher level of assessment where there is a strong desire to keep the tree due to its high ecological quality, historical importance, or location value, but more data is required to determine the severity of the defect. These will be GPS located with species, size, description of defect(s) and an ISA Level 2 Basic Assessment or Level 3 Advanced Assessment recommendation. These trees will be considered for these more detailed levels of inspection that will use specialized tools and equipment to adequately assess the severity of risk.
 7. If conducted, each Level 2 or 3 Assessment will follow (ISA) *Best Management Practices: Tree Risk Assessment* and *ANSI A300 Part 9: Risk Assessment* protocols, creating a written report (ISA Form below) producing a *Risk Rating* for the individual tree. This rating is derived using the following ISA BMP *Risk Rating Matrices*:

Likelihood of Tree Failure Impacting Target

Likelihood of Failure	Likelihood of Impacting Target			
	Very Low	Low	Medium	High
Imminent	Unlikely	Somewhat Likely	Likely	Very Likely
Probable	Unlikely	Unlikely	Somewhat Likely	Likely
Possible	Unlikely	Unlikely	Unlikely	Somewhat Likely
Improbable	Unlikely	Unlikely	Unlikely	Unlikely

Risk Rating Matrix

Likelihood of Failure and Impact	Consequences			
	Negligible	Minor	Significant	Severe
Very Likely	Low	Moderate	High	Extreme
Likely	Low	Moderate	High	High
Somewhat Likely	Low	Low	Moderate	Moderate
Unlikely	Low	Low	Low	Low

8. A Level 2 Tree Risk Assessment Inspection will:
 - a) Determine targets and target zone.
 - b) Thoroughly inspect the tree visually from ground level.
 - c) Review site history, conditions and species failure profile.
 - d) Assess potential tree loads.
 - e) Assess general tree health.
 - f) Record observations of site conditions, defects, and outward signs of possible internal defects and response growth.

9. A Level 3 Advanced Assessment Inspection will utilize one or more specialized techniques:
 - a) Aerial inspection using drones, climbers, or lifts.
 - b) Decay testing using specialized equipment (sonic tomograph/resistance drill).
 - c) Detailed target analysis of property values and occupation rates.
 - d) Detailed site evaluation.
 - e) Tree health assessment.
 - f) Root and root collar inspection and analysis.
 - g) Wind load testing/analysis.
 - h) Measurement of changes in trunk lean.

Mitigation of Potential Tree Risk

Based on the Level 1, 2 and 3 Assessment findings, (municipality) will then create prioritized risk mitigation options that may be utilized to reduce or eliminate those risks.

1. Level 1 Limited Visual Assessment
 - a. If a Level 1 Assessment finds a tree with an *imminent* risk of failure and there is potential for injury to staff or the public, the (municipality) will restrict access to the target zone of the tree or tree part and *act as soon as possible* (one to two days) to mitigate or eliminate the risk through pruning, removal, or other means.
 - b. Other potential elevated levels of tree risk found in the Level 1 Assessment may require pruning, cabling, bracing, cabling, removal, or other means *as soon as practical* (when work schedule or pruning allows) after the assessment.

2. Level 2 Basic Assessments and Level 3 Advanced Assessments
 - a. If Level 2 or Level 3 Assessments find any trees with an “Extreme” Risk Rating, the (municipality) will restrict access to the target zone of the tree or tree part and act *as soon as possible* to mitigate the risk through pruning, removal or other means.
 - b. If the Level 2 and 3 Assessments find any trees with a “High” Risk Rating, the (municipality) will implement risk mitigation measures through pruning, cabling, bracing, removal, or other means *as soon as practical* after the assessment.
 - c. “Moderate” Risk Rated trees may be mitigated and/or retained and monitored. Mitigation measures may be scheduled *as budgets and time allow*. These trees may be monitored over months or even years.
 - d. “Low” Risk Rated trees may not require any mitigation and should be retained (if desired) and monitored.
3. Prioritized Risk Mitigation Plan
 - a. All trees determined to need risk mitigating actions should be documented in writing by (municipality) staff and/or the urban forestry consultant. This documentation shall include the date the assessment was performed, the species, size, and condition of the tree, and a brief narrative detailing which parts of the tree are likely to fail, the likelihood of failure, the likelihood of impacting a target, the consequences of tree or tree part failure, and the overall tree risk rating, per the ISA’s TRAQ system of risk assessment.
 - b. The Director of ---, in consultation with other (municipality) staff, the Board of Commissioners, and/or a forestry consultant, will determine appropriate mitigation measures (such as removal, pruning, structural support, site modification, etc.) and will create a prioritized risk mitigation plan. Implementation of the plan will be based on the risk levels found, level of acceptable risk, budget constraints, and other factors that affect work priorities.

ISA Basic Tree Risk Assessment Form

Client _____ Date _____ Time _____
 Address/Tree location _____ Tree no. _____ Sheet _____ of _____
 Tree species _____ dbh _____ Height _____ Crown spread dia. _____
 Assessor(s) _____ Time frame _____ Tools used _____

Target Assessment

Target number	Target description	Target zone			Occupancy rate 1 – rare 2 – occasional 3 – frequent 4 – constant	Practical to move target?	Restriction practical?
		Target within drip line	Target within 1 x Ht.	Target within 1.5 x Ht.			
1							
2							
3							
4							

Site Factors

History of failures _____ Topography Flat Slope _____ % Aspect _____
 Site changes None Grade change Site clearing Changed soil hydrology Root cuts Describe _____
 Soil conditions Limited volume Saturated Shallow Compacted Pavement over roots _____ % Describe _____
 Prevailing wind direction _____ Common weather Strong winds Ice Snow Heavy rain Describe _____

Tree Health and Species Profile

Vigor Low Normal High Foliage None (seasonal) None (dead) Normal _____ % Chlorotic _____ % Necrotic _____ %
 Pests _____ Abiotic _____
 Species failure profile Branches Trunk Roots Describe _____

Load Factors

Wind exposure Protected Partial Full Wind funneling _____ Relative crown size Small Medium Large
 Crown density Sparse Normal Dense Interior branches Few Normal Dense Vines/Mistletoe/Moss _____
 Recent or planned change in load factors _____

Tree Defects and Conditions Affecting the Likelihood of Failure

— Crown and Branches —

Unbalanced crown LCR _____ % Cracks _____ Lightning damage
 Dead twigs/branches _____ % overall Max. dia. _____ Codominant _____ Included bark
 Broken/Hangers Number _____ Max. dia. _____ Weak attachments _____ Cavity/Nest hole _____ % circ.
 Over-extended branches Previous branch failures _____ Similar branches present
Pruning history
 Crown cleaned Thinned Raised Dead/Missing bark Cankers/Galls/Burls Sapwood damage/decay
 Reduced Topped Lion-tailed Conks Heartwood decay _____
 Flush cuts Other _____ Response growth _____
 Main concern(s) _____

Load on defect N/A Minor Moderate Significant _____
 Likelihood of failure Improbable Possible Probable Imminent _____

— Trunk —

Dead/Missing bark Abnormal bark texture/color
 Codominant stems Included bark Cracks
 Sapwood damage/decay Cankers/Galls/Burls Sap ooze
 Lightning damage Heartwood decay Conks/Mushrooms
 Cavity/Nest hole _____ % circ. Depth _____ Poor taper
 Lean _____ ° Corrected? _____
 Response growth _____
 Main concern(s) _____

Load on defect N/A Minor Moderate Significant
 Likelihood of failure Improbable Possible Probable Imminent

— Roots and Root Collar —

Collar buried/Not visible Depth _____ Stem girdling
 Dead Decay Conks/Mushrooms
 Ooze Cavity _____ % circ.
 Cracks Cut/Damaged roots Distance from trunk _____
 Root plate lifting Soil weakness

Response growth _____
 Main concern(s) _____

Load on defect N/A Minor Moderate Significant
 Likelihood of failure Improbable Possible Probable Imminent

Risk Categorization																			
Condition number	Tree part	Conditions of concern	Part size	Fall distance	Target number	Target protection	Likelihood								Consequences				Risk rating of part (from Matrix 2)
							Failure				Impact				Failure & Impact (from Matrix 1)				
							Improbable	Possible	Probable	Imminent	Very low	Low	Medium	High	Unlikely	Somewhat	Likely	Very likely	
1																			
2																			
3																			
4																			

Matrix 1. Likelihood matrix.

Likelihood of Failure	Likelihood of Impacting Target			
	Very low	Low	Medium	High
Imminent	Unlikely	Somewhat likely	Likely	Very likely
Probable	Unlikely	Unlikely	Somewhat likely	Likely
Possible	Unlikely	Unlikely	Unlikely	Somewhat likely
Improbable	Unlikely	Unlikely	Unlikely	Unlikely

Matrix 2. Risk rating matrix.

Likelihood of Failure & Impact	Consequences of Failure			
	Negligible	Minor	Significant	Severe
Very likely	Low	Moderate	High	Extreme
Likely	Low	Moderate	High	High
Somewhat likely	Low	Low	Moderate	Moderate
Unlikely	Low	Low	Low	Low

Notes, explanations, descriptions _____

Mitigation options _____ Residual risk _____
 _____ Residual risk _____
 _____ Residual risk _____
 _____ Residual risk _____

Overall tree risk rating Low Moderate High Extreme Work priority 1 2 3 4
 Overall residual risk Low Moderate High Extreme Recommended inspection interval _____
 Data Final Preliminary Advanced assessment needed No Yes-Type/Reason _____
 Inspection limitations None Visibility Access Vines Root collar buried Describe _____

This datasheet was produced by the International Society of Arboriculture (ISA) and is intended for use by Tree Risk Assessment Qualified (TRAQ) arborists – 2013

Appendix I: ANSI Z133.1 Standards – Applies to All Sections

All the ANSI Z133.1 safety standards shall apply to all tree care operations outlined in the Urban Forestry Management Plan. Listed below is a basic overview of the standard, and it is not verbatim. A full text of this manual will be made available to all Town employees and contractors involved with tree care operations.

1. All contractors conducting forestry related work for the Town shall provide proof of insurance that meets the Town's requirements.
2. All tools and equipment utilized during tree care operations, including those not specifically mentioned below, shall be inspected and maintained by qualified personnel in accordance with the manufacturer's care instructions.
3. All staff shall be trained in the proper use, inspection, and maintenance of said equipment.
4. Certified arborists or arborist trainees shall conduct job briefings daily prior to tree care operations of any kind and the information shall be communicated to all workers.
5. All activities performed on any job site for any activity outlined in this Urban Forestry Management Plan shall comply with all applicable OSHA guidelines and standards.
6. Traffic and pedestrian control shall be established around the job site prior to the beginning of tree care operations.
7. Emergency contact information and a safety kit conforming to the ANSI Z308.1 standards shall be made available to all workers. All employees shall have basic instruction on the use of CPR and First Aid.
8. Personal Protective Equipment (PPE) shall be required when there is a reasonable probability of injury or illness on the job site. Such a determination will be made by the Certified Arborist or Arborist Trainee prior to the beginning of tree care operations each day, and PPE shall be made available. PPE shall be well-maintained in accordance with the manufacturer's requirements.
9. Head protection shall conform to ANSI Z89.1, face and eye protection shall conform to ANSI Z87.1, respiratory protection shall comply with ANSI Z88.2, and leg protection shall always be worn when using a chainsaw.
10. Flammable liquids shall be kept a minimum of ten feet from open sources of flame or high heat and shall be stored in approved containers.
11. All Town staff and contractors working near electrical hazards shall be qualified to do so and shall be educated in the full ANSI standards for Electrical Hazards and Line Clearance.
12. Vehicles and mobile equipment shall be inspected and maintained by qualified personnel in accordance with the manufacturer's requirements and shall be equipped with all standard safety devices, decals, and instructions, and shall be operated within all federal, state, and local motor vehicle codes and ordinances.

- 13.** Aerial devices shall be inspected and maintained by qualified personnel in accordance with the manufacturer's requirements, and shall be equipped with all standard safety devices, decals, and instructions.
- 14.** Aerial devices shall be stabilized by wheel chocks, outriggers, or stabilizers as necessary for the device, and shall never be used to lift, hoist, or lower logs or equipment unless specifically designed to do so.
- 15.** Aerial devices shall be equipped with fall protection devices and permanent load ratings, both in accordance with ANSI/SIA 92.2 or 92.5, as applicable to the specific aerial device.
- 16.** No aerial device shall be allowed to make contact with electrical conductors, and minimum safe approach distances shall be maintained in accordance with the ANSIZ133.1 Standard.
- 17.** All brush chippers shall be inspected and maintained by qualified personnel in accordance with the manufacturer's requirements, and shall be equipped with all standard safety devices, decals, and instructions.
- 18.** Sprayers and related plant health care equipment shall be inspected and maintained by qualified personnel in accordance with the manufacturer's requirements, and shall be equipped with all standard safety devices, decals, and instructions
- 19.** Sprayer tanks or other similar enclosed spaces shall not be entered unless performed through a confined-space entry plan in accordance with OSHA 1910.46 Requirements, including air-quality testing, training, and PPE.
- 20.** Chain saws and other similar portable power tools shall not be operated unless the manufacturer's safety devices are in proper working order. Such safety devices shall not be removed or modified.
- 21.** A visual hazard assessment, including a root collar inspection, shall be performed by a certified arborist or arborist trainee prior to climbing, entering, or performing work in or on any tree, and a second crew member shall be within visual or voice communication at all times during arboricultural operations that are in excess of 12 feet from the ground surface.
- 22.** All ropes, saddles, carabiners, and other similar climbing equipment shall be: a) approved for use in the tree care industry by the manufacturer, b) have a minimum breaking strength or load capacity of 5,000 lbs., c) be inspected before each use, d) Equipment shall be removed from service when it shows signs of excessive wear or deterioration.
- 23.** All pruning, removal, and rigging operations shall have a designated drop zone where limbs, trunks, and tools can be dropped from aloft without impacting pedestrians or passersby. A visual or verbal communication system between the employee aloft and the employee(s) on the ground shall be established to determine when the employee aloft will safely drop tree parts or tools.
- 24.** Any tree parts which cannot be safely dropped or controlled from aloft shall have a separate rigging line tied to them to help control their fall. The tree shall be inspected for structural stability prior to the establishment of a rigging system in the tree. When trees appear to have defects that could jeopardize the ability to safely use a rigging system to drop or control a limb, an alternate plan shall be implemented.

- 25.** All equipment utilized in rigging shall meet the load ratings for the limb being rigged, and a qualified employee, trained in proper rigging procedure shall determine the rigging procedure and equipment to be utilized. Any equipment which has been damaged or overloaded shall be removed from service.
- 26.** When felling (removing) a tree, a crew leader shall make the determination of what equipment is necessary, and how many crew members are to be directly involved in drop zone operations. A well-established escape route shall be planned for involved workers prior to the beginning of felling operations. Any non-involved workers shall be beyond twice the height of the trunk or tree being removed during felling operations.
- 27.** Notches shall be used on all trees and trunks greater than five inches in diameter during felling operations and should conform to the standards set forth in the ANSIZ133.1 Standard.
- 28.** Loose clothing, ropes, lanyards, and saddles shall not be worn during any tree care activity where the risk of entanglement with tools or machinery is possible, particularly with brush chippers.

Appendix J: Tree Planting Standards (ANSI/ISA BMP)

ANSI Z60.1

1. All root ball and container sizes for all balled and burlapped stock shall conform to the Z60.1 standards for width and depth, such that they encompass enough of the fibrous root system as necessary for the full recovery of the plant upon installation.
2. All bare root stock shall conform to ANSI Z60.1 standards for minimum root spread.
3. All containerized stock shall conform to ANSI Z60.1 standards for plant and container size, as specified by the Town, and shall be healthy, vigorous, well-rooted and established in the container in which it is growing. The root system shall reach the sides of the container but shall not have excessive growth encircling the inside of the container.
4. All collected plants (those grown on unmanaged land) shall be so designated and shall be considered to be nursery-grown stock when they have been successfully reestablished in a nursery row and grown under regular nursery cultural practices for a minimum of two growing seasons.
5. The trunk or stem of the plant shall be in the center of the ball or container, with a 10% overall variance in location.
6. The use of digging machines in both the packaging and installation of trees is considered an acceptable nursery practice.

ANSI A300 – Part 6

1. Planting sites and work sites shall be inspected for hazards by the Town prior to the beginning of work each day. If portions of the work site are outside of the original scope of work, the controlling authority shall be notified immediately.
2. Location of utilities, obstructions, and other such hazards above and below ground shall be taken into account prior to planting and transplanting operations. These include, but are not limited to, gas, electric, sewer, communication, drainage, and signage.
3. The following shall be taken into consideration prior to transport and planting: Requirements of individual trees, compass orientation of field-grown trees, site feasibility assessments, soil assessment, and drainage assessment.
4. Tools for planting and transplanting shall be properly labelled or purchased for their intended use, and be maintained in accordance with the manufacturer's recommendations
5. The system used to move and store the plant shall minimize desiccation and other damage to the crown, trunk or rootball, and the health and vigor of the plant shall be maintained during these periods.
6. The hole to be dug for all new plantings shall be a minimum of 150% larger than the rootball or container diameter, as deep as the root flare of the tree to be planted, and shall have sides from which soil has been loosened in order to aid in root penetration.

7. For balled and burlapped trees, all rootball supporting materials shall be removed from the upper third of the rootball and removed from the planting hole prior to final backfilling.
8. Prior to planting, container root balls shall be managed by approved methods such as, shaving the root ball, slicing the root ball, and redirecting or removing encircling roots.
9. Backfill shall comprise of either the same soil created when the hole was excavated, or a similarly amended mixture to meet a specific objective and shall be applied in a layered fashion to reduce future settling and prevent air pockets.
10. Mulch shall be applied at a depth of two to four inches, near - but not touching - the trunk of the tree, and extending to the perimeter of the planting.
11. Support systems such as guy-wires or stakes shall not be installed except where needed.

ISA BMP Manual – Tree Planting

1. Timing of planting shall be determined based on the species, and the best professional opinion of the employees or contractors working for the Town of Cicero.
2. All employees and contractors employed by or working for the Town of Cicero shall be familiar with the following types of planting types, and when it is appropriate to use each:
 - A. **Bare-Root:** Field-grown, and dug without soil during the dormant season
 - B. **Ball and Burlap:** Field grown and packaged with a soil ball, using burlap, twine, and a retaining basket of some kind
 - C. **Tree Spade:** Transplanted using a mechanical tree spade to hold the soil ball during transport
 - D. **In-Ground Fabric Bag:** Field grown with the root mass contained in a semi-permeable fabric bag
 - E. **Container Grown:** Grown above ground in containers of various shapes, sizes, and materials
3. Trees packaged with root balls must have their first structural root within two inches of the soil surface. Trees with deeper structural roots will not perform well when transplanted and should be avoided when selecting nursery stock.
4. Trees with root balls shall be handled by the ball, not the stem, to ensure no damage occurs to the root-soil interface or to the stem itself.
5. Trees with leaves shall be transported with a fabric tarp to minimize desiccation and have had their root balls wetted prior to transport.
6. Sites shall be tested for drainage, nutrient levels, and pH prior to planting (or prior to species selection, if possible).
7. Container stock shall be removed from its container, and any encircling roots pruned off prior to planting, and the root ball shaved as necessary.

- 8.** For balled and burlapped trees, encircling roots shall be mitigated prior to planting, wrappings shall be left on until the tree is in the hole; wrapping shall then be removed from the third to fourth of the wire basket and burlap from the top of the ball.
- 9.** As soil is added, wet and tamp each layer down to ensure good moisture and reduction of air bubbles.
- 10.** Do not prune trees at time of planting, unless to remove dead, dying, diseased, or cracked branches, as it may take away from root development to have the tree attempt to heal these above-ground wounds.
- 11.** The use of trunk wrap may be considered in areas with harsh winters, specifically on trees with thin bark, such as London Planetree and certain Maple species.

Appendix K: Tree Pruning Standards (ANSI/ISA BMP)

ANSI A300 - Part 1

1. A designated Arborist or Arborist Trainee shall visually inspect each tree before beginning work. If any condition is observed above and beyond the original scope of work, said condition shall be reported to the controlling authority before any work begins.
2. Pruning cuts which remove a branch at its point of origin shall be made close to the trunk or parent branch without cutting into the branch-bark collar or leaving a stub.
3. Pruning cuts made to reduce the length of a limb or parent stem shall be made at a slight angle relative to the remaining stem and not damage the remaining stem. If pruning to a lateral branch, the lateral should be large enough to assume the terminal role.
4. Final cuts shall be made such that the result is a flat surface, with the adjacent bark firmly attached.
5. Not more than 25% of the foliage shall be removed during an annual growing season, depending on the tree species, size, age, and condition. If more frequent pruning due to utilities, vistas, or health considerations is necessary, removal of the tree should be considered as an alternative to pruning.

ISA BMP Manual

1. All employees or contractors directly involved with the pruning of trees shall be familiar with the following pruning types and how they are to be used in conjunction with one another:
 1. **Pruning to Clean:** Selective removal of dead, diseased, detached, cracked, and broken branches
 2. **Pruning to Thin:** Selective removal of small live branches to reduce crown density
 3. **Pruning to Raise:** Selective removal of branches to provide vertical clearance
 4. **Pruning to Reduce:** Selective removal of branches and stems to decrease the height or spread of a tree or shrub
 5. **Structural Pruning:** Selective removal of live branches and stems to influence the orientation, spacing, growth rate, strength of attachment, and ultimate size of branches and stems
 6. **Pruning to Restore:** Selective removal of branches, sprouts, and stubs from trees and shrubs which have been topped, severely headed, vandalized, lion-tailed, storm damaged, or otherwise damaged
2. Every effort shall be made to time pruning of individual tree species to be done in accordance with best management practices for the tree species in question. All pruning work shall be done so at the discretion of the Town of Cicero and its approved contractors.

Appendix L: Tree Protection (ANSI/ISA BMP)

ANSI A300 – Part 5

1. Tree management plans and specifications for tree management shall be written and administered by a certified arborist qualified in the management of trees and shrubs during site planning, development, and construction. Such activities may include, but are not limited to: demolition, grading, building construction, walkway or roadway construction, excavation, trenching and boring, or other such activity which has the potential to negatively impact trees.
2. The management of trees and shrubs shall be incorporated into the following phases of the site development process:
 - A. Planning
 - B. Design
 - C. Pre-Construction
 - D. Construction
 - E. Landscape
 - F. Post-Construction
3. During the Planning phase, an assessment of tree and shrub resources on the site shall be performed by a certified arborist. The assessment shall identify the species, condition, and size of each tree and shall be incorporated into the site design. Trees to be retained or protected shall appear on site design maps. Trees on neighboring properties that could also be impacted should be considered.
4. During the design phase, a tree management report shall be developed for trees to be conserved on the site, and shall be included in the construction plans and specifications, which may include, but are not limited to:
 - A. Trees to be retained
 - B. Tree and Root Protection Zones (TPZ/RPZ)
 - C. Tree Protection Zone barriers
 - D. Tree Protection plans
 - E. Soil erosion control
 - F. Soil compaction controls
 - G. Staging and storage areas
 - H. Other relevant on-site activities

5. Grading and demolition plans shall include all trees to be retained and removed, as well as the tree protection plans for working around trees to be retained. Plans shall also include equipment routes for avoiding the TPZ. Consequences for non-compliance shall be specified.
6. During the pre-construction phase, all tree protection plans shall be effectively communicated to all parties involved with the site development, and tree protection zone barriers shall be in place prior to the beginning of any construction activities.
7. The TPZ shall be delineated around all trees to be protected during construction, and shall be based on the size, species, and condition of the tree and its root system. Six to 18 times the diameter of the tree is generally considered to be acceptable. Deviations from this diameter may be made at the discretion of a certified arborist. Activities which could damage tree roots or compact soil should be avoided in the TPZ
8. Fencing or other visible barriers to the TPZ shall be installed prior to site clearing, grading, and demolition, and maintained throughout the construction and landscaping phase. When this is not feasible, alternate methods may be considered.
9. During the construction phase, compliance with tree protection plans shall be monitored by a certified arborist, and any damage to tree barriers or trees, or non-compliance shall be reported to the project manager or owner, or other controlling authority.
10. When removing vegetation or pavement during demolition, equipment used adjacent to the TPZ shall be specified to avoid damage to the tree and the surrounding soil, and soil protection measures shall be in place prior to vehicle or heavy traffic in or near the TPZ.
11. Storage or disposal of construction materials or hazardous materials shall not occur in the TPZ.
12. Fill within the TPZ shall not be permitted without mitigation to allow for proper air and water availability to existing roots. If fill cannot be avoided in the TPZ, compaction of fill shall be avoided, and consideration shall be given to a permanent well installation to protect the tree and its roots.
13. During the landscape, irrigation, and lighting phase, levels of compliance shall be documented and reported by a certified arborist. Non-compliance shall be reported to the project manager.
14. During the post-construction phase, a remedial and long-term maintenance plan shall be specified for existing and new landscaping, to ensure success of preservation efforts and newly planted landscaping.
15. Pruning shall be considered to reduce wind sail when necessary. It should not be considered to compensate for root loss.
16. Mulch shall be applied to as much of the tree protection zone as possible, in order to create a favorable soil environment for root recovery after construction activities.

ISA BMP Manual

1. A cost-benefit analysis shall be conducted during the planning phase. In some cases, money may be better invested in tree planting post-construction.

2. The species and age of tree shall be evaluated by a certified arborist, so that trees in good condition with desirable characteristics are preserved, but those in poor condition or with undesirable characteristics are not.
3. A tree inventory and tree management report shall be conducted during the planning phase, and a certified arborist shall work closely with developers to ensure best management practices are being met for both parties.
4. Efforts shall be made to retain groups of trees, such that there is a wind and solar buffer around the highest quality trees if possible.
5. The Critical Root Zone (CRZ) is the area around the tree trunk where roots essential for tree health and stability are located. A Tree Protection Zone (TPZ) is an arborist-defined area around the tree which should include the CRZ, as well as additional area to ensure future stability and growth. The TPZ is subject to the professional opinion of the certified arborist.
6. An attempt shall also be made to preserve native soil for landscape planting as native soil with horizons is preferred over fill or black dirt.
7. If a sufficient TPZ cannot be established, a 6-12” layer of hardwood mulch, 3/4-inch plywood mat over a four-inch layer of hardwood mulch, or other such measures shall be temporarily installed over the CRZ to prevent root and soil compaction.
8. Trunk protection shall be installed on trees very close to construction activities, and should consist of 2x4 or 2x6 planks, strapped snugly to the tree trunk with wire or other strapping, preferably with a closed-cell foam between the trunk and the planks.
9. When roots over one inch cannot be avoided, they shall be pruned, not left torn or crushed. Acceptable methods of pruning are:
 - A. Excavation using high pressure air tools, pressurized water, or hand tools, followed by selective root cutting
 - B. Cutting through the soil along a predetermined line with a tool designed to cut roots.
 - C. Mechanically excavating the soil and selectively pruning remaining roots.
10. Wells, tree islands, retaining walls, and other such structures or strategies may be considered as alternatives to any cut/fill work in the CRZ or TPZ.
11. Monitoring shall take place during construction and post-construction phases, and any non-compliance should be reported to the proper controlling authority right away, so that timely remediation or mitigation efforts may be undertaken.

Appendix M: Critical Risk Trees

The following table is of Critical Risk Trees found in the inventory that should be remediated immediately if they have not been taken care of already.

TREE ID	ADDRESS	STREET	SITE	COMMON NAME	DBH	CONDITION	ARBORIST_REC	REC_REASON_1	REC_REASON_2	RISK LEVEL	COMMENTS
2644	3710	S Central Ave	F1	LINDEN-LITTLELEAF	21	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	ROT-HEARTWOOD	CRITICAL	street light
3561	3733	S 57th Ct	F1	MAPLE-NORWAY	28	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	WOUNDS-TRUNK	CRITICAL	limited growspace
3640	1647	S 56th Ct	R2	ELM-SIBERIAN	40	BELOW AVG (ANY)	PRUNE-PRIORITY	DEADWOOD-LARGE LIMB	DEADWOOD-MODERATE	CRITICAL	massive dead limbs over street, prune those and whole tree
3648	1635	S 56th Ct	F1	LINDEN-AMERICAN	30	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	INCLUDED BARK	CRITICAL	actively failing union, inspect and remediate asap
11613	2114	S 51st Ave	F1	MAPLE-SILVER	33	VERY POOR / DEAD (ANY)	REMOVE-PRIORITY	ROT-HEARTWOOD	DEADWOOD-SEVERE	CRITICAL	
12199	5236	W 30th Pl	F1	MAPLE-RED	20	VERY POOR / DEAD (ANY)	REMOVE-PRIORITY	DEADWOOD-SEVERE	<Null>	CRITICAL	
12774	5024	W 29th St	L2	MULBERRY-SPP	51	BELOW AVG (ANY)	REMOVE-PRIORITY	INCLUDED BARK	WEAK TRUNK UNION	CRITICAL	12" split trunk
13154	2413	S 56th Ct	F1	BOXELDER	20	VERY POOR / DEAD (ANY)	REMOVE-PRIORITY	DEADWOOD-LARGE LIMB	DEADWOOD-SEVERE	CRITICAL	Multiple large dead limbs and hangers.
13273	5043	W 32nd St	F1	MAPLE-SILVER	44	BELOW AVG (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	INCLUDED BARK	CRITICAL	streetlight
13428	3116	S 53rd Ct	F1	HORSECHESTNUT	34	VERY POOR / DEAD (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	<Null>	CRITICAL	
16133	4815	W 28th St	F1	ELM-SIBERIAN	42	VERY POOR / DEAD (ANY)	REMOVE-PRIORITY	WEAK TRUNK UNION	ROT-HEARTWOOD	CRITICAL	previous failure, fruiting bodies ROW?



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Ben Lindsey

RE: Review and possible action relating to a request to order GETAC Body Camera Fleet & In-Squad Video Recording System at a cost not to exceed \$25,847.00 (Lindsey, Police Captain)

BACKGROUND

The Police Department is in need of new Body Worn Cameras to replace the current cameras that have exceeded their useful life estimate (4 years). The current cameras have been in operation since approximately 2020. The original purchase of body cameras on the GETAC platform consisted of a quantity of 12. Currently, 5 of the 12 are operational. As staff has worked through 2025, it has become clear that the current camera's lifespan has been exceeded. Staff has experienced glitches, uploading errors, and complete failure of individual cameras. The proposal from GETAC to purchase, install, and deploy a new fleet of body cameras is \$16,489.

The Department is also in need of two in-squad camera recording systems. These items also exist on the GETAC platform and are consistent with the patrol fleet. One of the systems will be utilized in the new squad car that the City Council approved on December 2nd, and the other is to replace an existing aging system. The proposal from GETAC for the purchase and deployment of these two recording systems is \$9,358.

The total cost of both systems is \$25,847.00.

DISCUSSION

The purchase/replacement of the in-squad camera system and body camera inventory is essential to Department operations as it allows for increased evidence gathering, officer accountability, and protection of officers and the general public.

Staff did not test or review any other products, as Midwest Public Safety is the sole source vendor for the Department's GETAC video platform. GETAC is the best fit for the agency and is integrated into the existing patrol car recording systems, interview room system, and evidence sharing platform. Upgrading the current body cameras to the newest GETAC version will allow continued seamless integration with existing systems. The in-squad GETAC systems are

consistent with the rest of the patrol fleet and will also allow for seamless integration with existing systems.

FINANCIAL ANALYSIS

Staff did not seek additional proposals for the reasons stated above, which complies with the purchasing policies outlined in the Financial Stability Guidebook, section 1.9(3). Midwest Public Safety is the sole vendor for the Department's deployable video/audio recording platform. The items quoted are the most current version to replace the aging body camera system and to outfit squad cars consistently across the patrol fleet.

Funds to purchase a new fleet of GETAC Body Cameras and two in-squad video systems would come from the 2026 Capital Improvement budget, as outlined in the Police Department Budget. The 2026 levy-supported Capital Improvement Budget included \$26,000 for this purchase, with the quotes coming in under budget at \$25,847.

The quoted items are below:

GETAC BWC BC-04-1080P

BC-04-1080P - BWC DEVICE and supporting Accessories.

Total \$16,489.00

GETAC VR-X20G3 In-Car Video

VR-X20G3 for In-Car Video and supporting accessories

Total \$9,358.00

Grand Total \$25,847.00

RECOMMENDATION

Staff recommends the City Council approve the purchase order for the GETAC Body Worn Cameras and the in-car recording system at a total cost not to exceed the quoted amount of \$25,847, as included in the 2026 CIP. Staff will not expend the funds until 2026.

ATTACHMENTS

1. Quote, body cams, accessories, revision 2 no licensing
2. Quote, In-Car Video, FAPD



QUOTE, BODY WORN CAMERAS AND ACCESSORIES

Includes items that will be needed in vehicles for BWC operation

Midwest Public Safety
 C/O US Bank N.A.
 TFM P.O. Box 860573
 Minneapolis, Minnesota 55486-0573
 United States

2178550082
 midwestpublicsafetygroup.org

BILL TO
Fort Atkinson Police Department
 LT Ben Lindsey
 101 S. Water St. W
 Fort Atkinson, Wisconsin 53538
 United States

920-563-7777
 blindsey@fortatkinsonwi.gov

Estimate Number: 161511808
Estimate Date: June 18, 2025
Valid Until: July 18, 2025
Grand Total (USD): \$16,489.00

Products	Quantity	Unit Price	Extended Price
OVWX5XXXXXX5 BC-04-1080P - BWC DEVICE, 64GB + FHD/HD/WVGA, WIFI + GPS + BLE, 5 YEARS WARRANTY, 5 YEARS BATTERY WARRANTY	12	\$1,100.00	\$13,200.00
OD4C5U Getac BWC 8 PORT MULTIDOCK (MD-04), INCLUDES 150W AC ADAPTER (US), 5 YEAR WARRANTY	1	\$1,065.00	\$1,065.00
ORBD3U Single Port Dock (VD-04L), USB-C to USB-ACable, USB AExtension Cable, Ethernet cable, USB-A10W AC adapter(US),3 year warranty	4	\$140.00	\$560.00
ORB312 Body Worn Camera Alligator Clip V2.0	12	\$22.00	\$264.00
GVS-OZX04X GETAC VIDEO SOLUTIONS INC. : Getac Video Solution - Remote Setup, Configuration, or PreTesting - Per day	1	\$1,400.00	\$1,400.00



QUOTE, BODY WORN CAMERAS AND ACCESSORIES

Includes items that will be needed in vehicles for BWC operation

Midwest Public Safety
C/O US Bank N.A.
TFM P.O. Box 860573
Minneapolis, Minnesota 55486-0573
United States

2178550082
midwestpublicsafetygroup.org

Grand Total (USD): \$16,489.00

Notes / Terms

Midwest Public Safety
2665 Harryland Rd.
Decatur, IL 62521
www.midwestpublicsafetygroup.org
217-855-0082

To place an order from this quote, please complete and sign below, then forward this quote with your order instructions.

Accepted by:

Printed Name and Title:

Email address for Invoices to be sent:

Accepted Date:



QUOTE, IN-CAR VIDEO

Quote for 2 in-car units

Midwest Public Safety
 C/O US Bank N.A.
 TFM P.O. Box 860573
 Minneapolis, Minnesota 55486-0573
 United States

2178550082
 midwestpublicsafetygroup.org

BILL TO
Fort Atkinson Police Department
 LT Ben Lindsey
 101 S. Water St. W
 Fort Atkinson, Wisconsin 53538
 United States

920-563-7777
 blindsey@fortatkinsonwi.gov

Estimate Number: 161511799
Estimate Date: June 11, 2025
Valid Until: July 11, 2025
Grand Total (USD): \$9,358.00

Products	Quantity	Unit Price	Extended Price
OBABUQXHXXXX VR-X20G3 for In-Car Video, supports up to 4 cameras - DVR(VR-X20G3)- Ultra5+8GB RAM+256GB SSD+2nd 256GB SSD , Blackbox Recording, Backup Battery, Crash Sensor, DVR mounting bracket, Display (CU-D50) - 5 Touch Display, includes cable (16ft),QHD(2K) Dual IP	2	\$3,775.00	\$7,550.00
OIA01X GETAC VIDEO SOLUTIONS INC. : Mounting Bracket (Visor) - Universal for Display (CU-D50) ONLY	2	\$98.00	\$196.00
GE-SVTREXT2Y In Car Video Solution Extended Warranty - Year 4 & 5 - Getac, In Car Video Solution, Extended Warranty, 2, Year	2	\$375.00	\$750.00
OWC01M annual maintenance per month	24	\$15.00	\$360.00
590GBL001097 Airgain EZConnect MULTIMAX 5G 3in1 antenna: 2xWi-Fi, 1xGNSS with 1 foot pigtail, Black	2	\$150.00	\$300.00
590GBL001099 Airgain EZConnect MULTIMAX 5G 3in1 cable harness, 2xWi-Fi, 1xGNSS, 19 feet RP SMA on Wi-Fi, SMA on GNSS	2	\$101.00	\$202.00



QUOTE, IN-CAR VIDEO

Quote for 2 in-car units

Midwest Public Safety
C/O US Bank N.A.
TFM P.O. Box 860573
Minneapolis, Minnesota 55486-0573
United States

2178550082
midwestpublicsafetygroup.org

Grand Total (USD): \$9,358.00

Notes / Terms

Midwest Public Safety
2665 Harryland Rd.
Decatur, IL 62521
www.midwestpublicsafetygroup.org
217-855-0082

To place an order from this quote, please complete and sign below, then forward this quote with your order instructions.

Accepted by:

Printed Name and Title:

Email address for Invoices to be sent:

Accepted Date:



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Zach Navin, Director of Public Works

RE: Review and possible action relating to N. Main St. Sanitary Sewer Design Task Order (Navin, Director of Public Works)

BACKGROUND

The sanitary sewer on the east side of N. Main Street currently runs through the basements of the businesses on the 100 block of N. Main Street. This sanitary sewer line is an old clay pipe that is well past its useful life and in poor condition. Staff is only able to clean it with certain equipment due to the risk of damaging the pipe. This summer, Premier Bank submitted a concept plan for initial review of a planned unit development proposal to the Plan Commission to build a parking lot on N. Water Street E. on properties that the bank currently owns. There are several steps that need to take place before this project could be approved, including a formal PUD submittal to the Plan Commission and a general development plan and zoning map amendment, which would come before the City Council for review.

DISCUSSION

City staff identified this proposal as an opportunity to take advantage of construction and potentially relocate the sanitary sewer that is currently located in the basements of the businesses on the east side of N. Main St. As shown in the attached Sanitary Sewer map, there is a sanitary main that runs through the properties on N. Main, this is the referenced outdated pipe.

Staff proposes to work with Ruckert & Mielke to redesign this pipe to come through the parking lots behind the properties on N. Main Street and the proposed lot on N. Water St. E. The task order recommended by staff is for the design of this sanitary sewer, as staff want to be prepared if the proposed Premier Bank parking lot were to move forward.

If the parking lot does not move forward, staff still believes that the design should be completed for future construction.

FINANCIAL ANALYSIS

The proposal from Ruckert & Mielke is \$29,360 for design work. The sanitary sewer utility has operating funds available for the design work. The design will include an Engineer's estimate of

the total cost of construction, which has not been included in the 2026 budget. After costs are determined and if the Premier Bank parking lot construction is approved and moves forward, staff will bring the potential cost of the sanitary sewer relocation project back to the City Council for review.

RECOMMENDATION

Staff recommends approving Task Order 2025-08 from Ruekert & Mielke for the Design and Construction services of the N. Main St. Sanitary Sewer Redesign in an amount not to exceed \$29,360.00

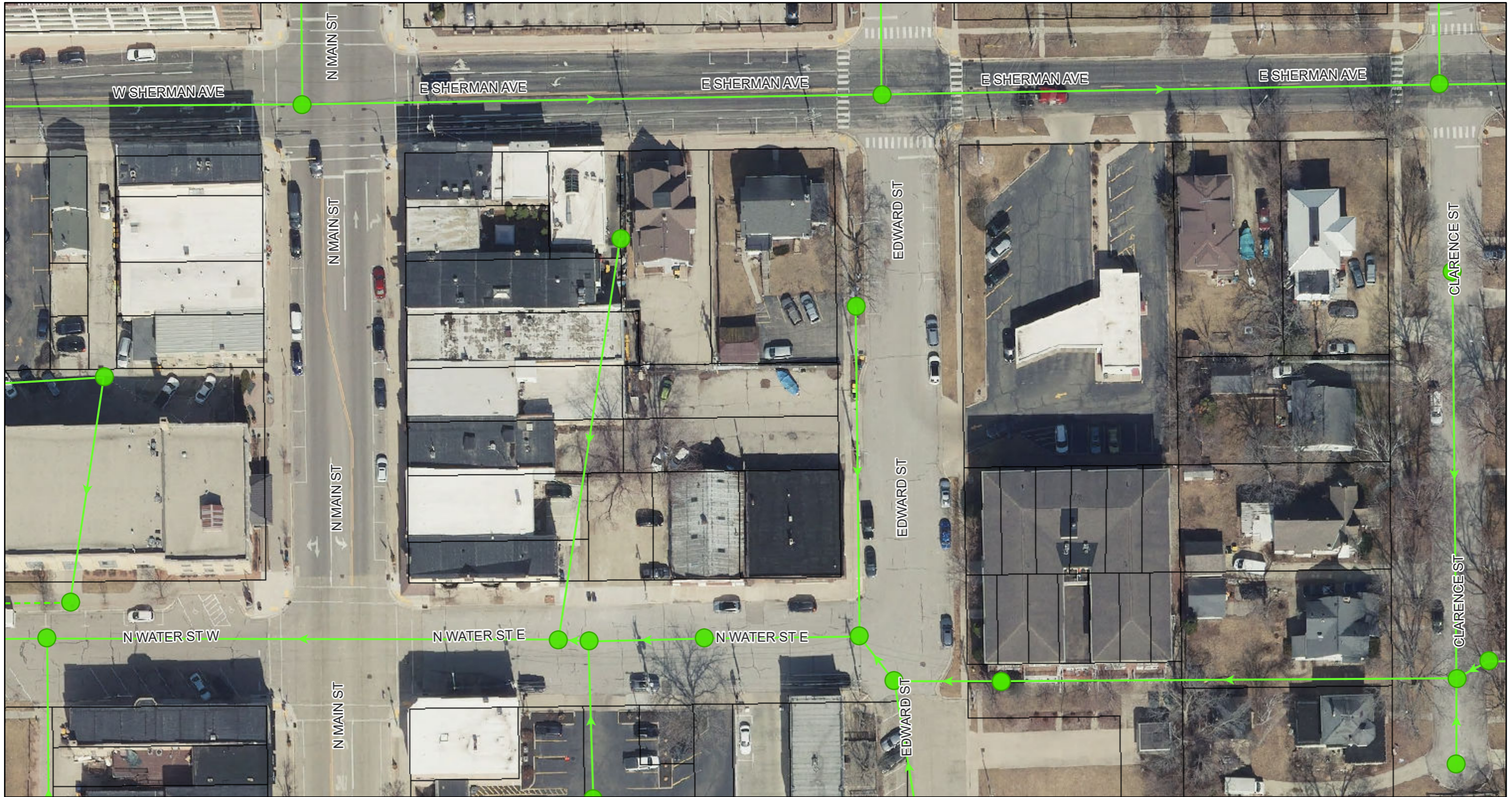
ATTACHMENTS

- 1. 9.9.25 Plan Commission Packet (1)
- 2. Sanitary Map
- 3. 9.9.25 Plan Commission Packet (1).1
- 4. Task Order Form 2025-08 (1)

Proposed Parking Lot location



City of Fort Atkinson - Sanitary Sewer

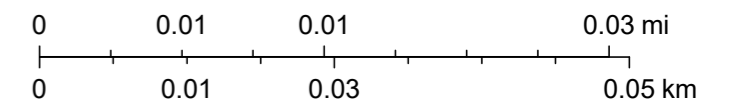


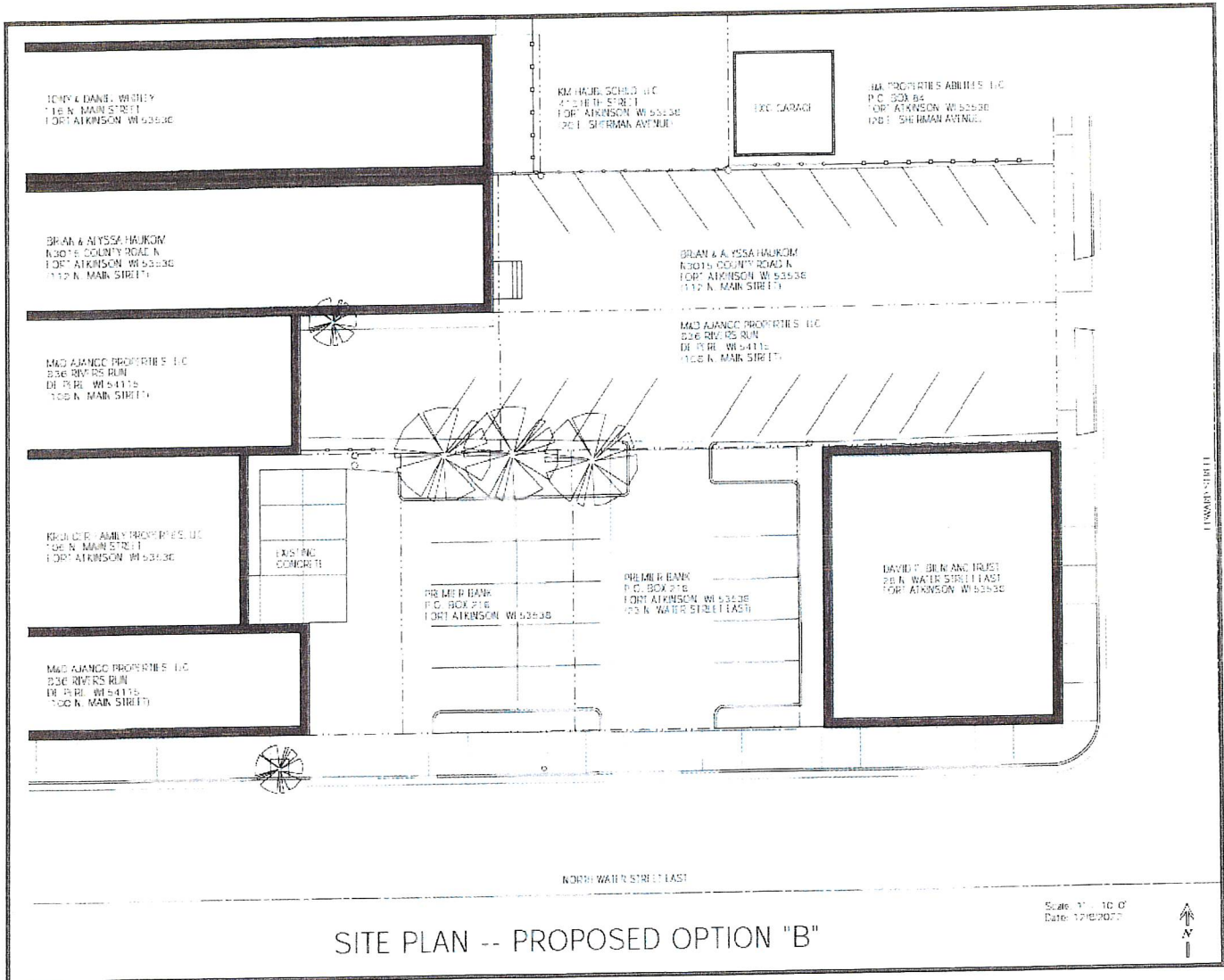
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- Sanitary Manhole
- - - Other
- Tax Parcel Information
- Main

- 2025Aerial
- Red: Band_1
 - Green: Band_2
 - Blue: Band_3





3044: 3-10-2023



NOT TO SCALE

**EXHIBIT 2
PROPOSED PARKING LOT CONCEPTUAL SITE PLAN**

PREMIER BANK PARKING STUDY - FORT ATKINSON, WISCONSIN

This is Task Order No. 2025-08,
 consisting of 4 pages.
 City of Fort Atkinson
 Main Street Sanitary Sewer Re-
 alignment

In accordance with the Agreement Amendment between City of Fort Atkinson (Owner) and Ruekert & Mielke, Inc. (Engineer) dated June 21, 2022, and amended on January 21, 2025, Owner and Engineer agree as follows:

1. Specific Project Data

- A. Title: Main Street Sanitary Sewer Re-alignment
- B. Description: Design solution to re-align existing sanitary sewer (MH 6B to MH 6) in the 100 block of N. Main Street. The existing sanitary sewer is located along the rear of lots and beneath the buildings at 112 and 116 N. Main Street. This project would serve to: (1) improve access for maintenance and repair; (2) eliminate the risk of the public sewer flooding the basements at 112 and 116 N. Main Street; (3) replace clay pipe with new PVC pipe; and (4) replace sewer lateral connections at sewer main. This task order includes survey, design, bidding, construction phase services, and creation of a permanent utility easement exhibit.

2. Services of Engineer

- A. Data Collection
 - a. Submit Dig Request, Project Coordination, and Build Cadastral
 - b. Set Control and Conduct Boots on Ground Topographic Survey
 - c. Scanning Basements (112 & 116 N. Main Street)
 - d. Measuredowns (Sanitary and Storm Structures, Water Valves)
 - e. Survey Data Download, Quality Control, and Measuredown Processing
 - f. Drone Mapping (Flight Prep/Coordination, Flight, and Data Processing)
 - g. Engineering Field Check
 - h. Prepare Permanent Utility Easement Exhibit
- B. Plan Design
 - a. Prepare Pipe Networks and Setup Plan Sheets; Import Base Files
 - b. Design and Prepare Sanitary Plan and Profile Sheets
 - c. Design and Prepare Erosion Control and Traffic Control Drawing
 - d. Prepare Cover, Index, General Notes, Typical Sections, and Construction Details
 - e. Provide Preliminary Drawings to Utilities and Follow Up Coordination
 - f. Quantities and Opinion of Probable Construction Cost
 - g. Prepare Project Manual
 - h. Plan Review Meeting with City Staff
 - i. Prepare and Submit Sanitary Sewer Application to DNR
- C. Bidding
 - a. General Coordination with City
 - b. General Coordination with Potential Bidders
 - c. Facilitate Virtual Bid Opening
 - d. Review Bids and Prepare Bid Tabulation
 - e. Issue Notice of Award
 - f. Prepare and Facilitate Contract Execution
 - g. Issue Notice to Proceed
- D. Construction
 - a. Preconstruction Meeting (Agenda, Attendance, Minutes)
 - b. Staking of Sanitary Sewer
 - c. Construction Review-Part Time (Assume 8 hours per week for 2 weeks)
 - d. Submittal Review
 - e. Pay Request Review and Recommendation (Assume 1 Pay Request)
 - f. Substantial Completion Inspection and Develop Punchlist//Coordination with Contractor
 - g. Project Closeout

3. Items Excluded

- Scope that is not specifically listed above.
- Creation of temporary limited easement (TLE) exhibits.
- Permit fees.
- Flow monitoring of sewer.
- Title report required to create legal documents.
- Follow up site visits, meetings, and certifications.
- LUST, historical, environmental, or archeological investigations.
- Alternatives analysis.
- Value engineering.
- Record drawings.
- Boundary survey or property survey.
- Wetland delineation and/or reporting.
- Real estate appraisal/acquisition.
- Permitting (other than listed above).
- Public hearings or public informational meetings.
- Grant application completion or administration related to this project.

4. Owner’s Responsibilities

- Attendance at meetings to review preliminary design and construction cost opinion.
- Assist with access to the basements at 112 and 116 N. Main Street for scanning.

5. Schedule

A. Schedules are subject to change due to activities beyond the control of Engineer. In general, the Project schedule is as follows:

<u>Phase</u>	<u>Completion Date</u>
Authorization/Task Order Approval	10/7/25
Data Collection	10/31/25
Final Design and Review with City Staff	12/31/25
Advertise for Bids	1/9/26 & 1/16/26
Bid Opening	2/2/26
Council Approval and Award	2/3/26
Start Construction	4/15/26
Substantial Completion	5/29/26
Final Completion	6/12/26

6. Payments to Engineer

A. Owner shall pay Engineer for services rendered as follows:

<u>Category of Services</u>	<u>Compensation Method</u>	<u>Estimate of Compensation for Services</u>
Design Services	Standard Hourly Rates	\$21,218
Utility Easement Exhibit	Standard Hourly Rates	\$1,200
Construction Services	Standard Hourly Rates	\$6,942
Total =		\$29,360
* Construction services includes a 3% rate adjustment for 2026		

B. The terms of payment are set forth in the Standard Terms and Conditions.

7. Consultants

None.

8. Other Modifications to Standard Terms and Conditions

None.

9. Attachments

Exhibit A – Project Area Map.

10. Documents Incorporated by Reference

Ruekert & Mielke, Inc. / City of Fort Atkinson Master Agreement

TASK ORDER 2025-08

TASK ORDER NO. 2025-08
Main Street Sanitary Sewer Re-alignment
Between City of Fort Atkinson
and
Ruekert & Mielke, Inc.
Dated: 09/23/2025

Terms and Conditions: Execution of this Task Order by Owner and Engineer shall make it subject to terms and conditions, (as modified above) set forth in the Master Engineering Agreement Amendment between Owner and Engineer, dated June 21, 2022, and amended on January 21, 2025, which are incorporated by this reference. Engineer is authorized to begin performance upon its receipt of a copy of this Task Order signed by Owner.

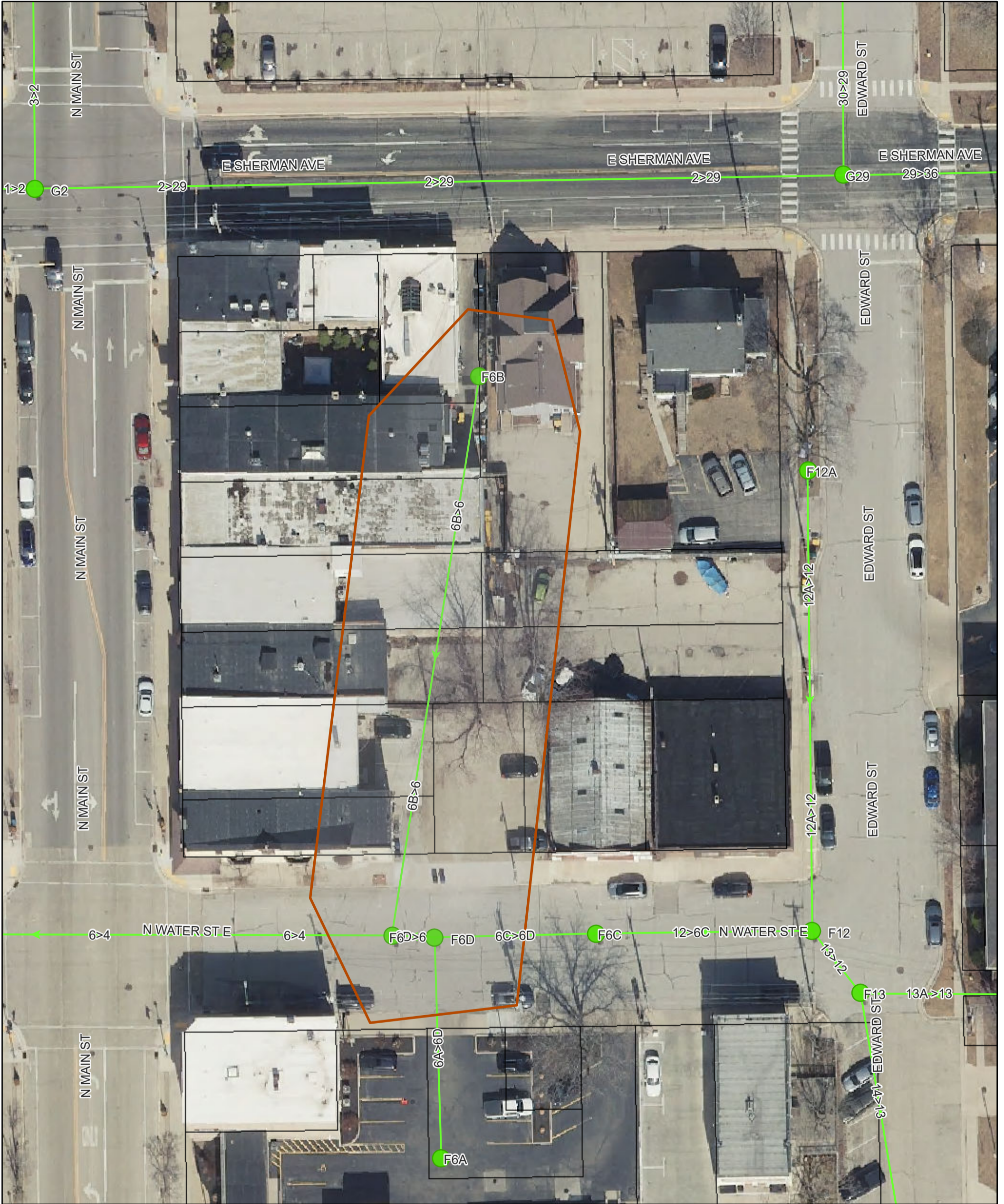
The Effective Date of this Task Order is October 7, 2025.

OWNER:	ENGINEER:
City of Fort Atkinson	Ruekert & Mielke, Inc.
Signature: _____	Signature: _____
Name: <u>Rebecca Houseman</u>	Name: <u>Jason P. Lietha, P.E.</u>
Title: <u>City Manager</u>	Title: <u>Senior Vice President</u>
Date: _____	Date: <u>09/23/2025</u>

DESIGNATED REPRESENTATIVE FOR TASK ORDER

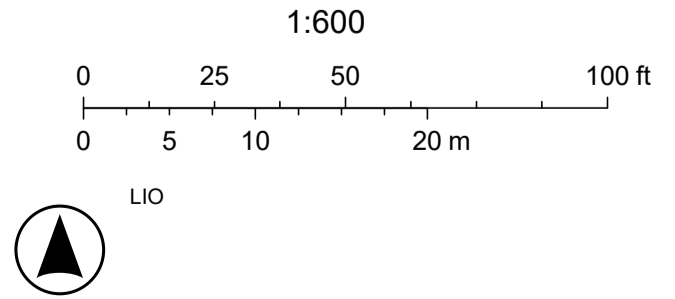
Name: <u>Zach Navin</u>	Name: <u>Andrew W. Burt, P.E.</u>
Title: <u>Director of Public Works</u>	Title: <u>Project Manager</u>
Address: <u>101 N Main Street</u> <u>Fort Atkinson, WI 53538</u>	Address: <u>4630 S Biltmore Lane</u> <u>Madison WI 53718</u>
Email: <u>znavin@fortatkinsonwi.gov</u>	Email: <u>aburt@ruekert-mielke.com</u>
Phone: <u>920-397-9901</u>	Phone: <u>608-819-2600</u>

Exhibit A - Project Area Map



9/22/2025, 4:16:09 PM

- Sanitary Manhole
 - Gravity Main
 - Main
 - Tax Parcel Information
- 2025Aerial
- Red: Band_1
 - Green: Band_2
 - Blue: Band_3





MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Zach Navin, Director of Public Works

RE: Review and possible action relating to Amendment No. 1 to Task Order 2025-02: 2026 Road Rehabilitation and Water Relay-Design Project (Navin, Director of Public Works)

BACKGROUND

On January 21, 2025, the City Council awarded the bid to Ruckert & Mielke for the 2026 Road Rehabilitation and Water Relay-Design Project and Task Order 2025-02 was approved on February 7, 2025. Staff has since moved the construction of this project to 2027 due to increased costs in the 2026 S. Main St. Pedestrian Path and Water Relay Project. This work will be known as the 2027 Road Rehabilitation and Water Relay-Design Project moving forward.

DISCUSSION

Ruckert & Mielke staff have been working on the design for the approved task order and have addressed several questions and clarifications that have added additional scope to the original task order. These items include

1. Extending the project limits on Jefferson St. to extend from White St. to Blackhawk Drive,
2. Extending storm sewer infrastructure from N. High St. to White St.,
3. Redesigning the alley at the intersection of Oak St. and Harrison St. to create a safer intersection for pedestrians and drivers
4. Extending the project limits on Oak St. to design a cul-de-sac at the end of Oak St., removing the dead end and improving public works and emergency services vehicular access, and
5. Allowing for Ruckert & Mielke staff to complete a thorough inspection of all sanitary and storm infrastructure within the project area to ensure repairs are identified in drawings prior to construction being bid out.

As noted in the task order amendment attached, a few scope changes have been previously authorized by staff that include narrowing Jefferson St. and redesigning the Heth & Clover intersection. These improvements will reduce impervious surfaces and create a safer

intersection.

FINANCIAL ANALYSIS

As noted below, the original task order cost was \$61,644.00 and the proposed amendments cost \$36, 912.00 for a new total of \$98,556.00 for the design of the 2027 road rehabilitation and water relay project. The additional \$36,912.00 will be paid for out of the storm water, water, and waste water utility funds as well as Fund 5. Each fund is assigned a percentage of the fee based on their overall percentage of the project.

Item	Amount
Original Task Order Amount	\$61,644.00
Net Change for Prior Amendments	\$0.00
This Amendment Amount (Design Fees)	\$36,912.00
Adjusted Task Order Amount	\$98,556.00

RECOMMENDATION

Staff recommends the approval of Amendment #1 of Task Order 2025-02 2027 Road Rehabilitation and Water Relay Project not to exceed \$36,912.00

ATTACHMENTS

- 1. Amendment to Task Order-2025-02 (1)
- 2. Task Order 2025-02 2026 Water Relay and Road Rehab Design
- 3. 2026 Project Award info (1)

Amendment To Task Order No. 2025-02

1. Background Data:

Effective Date of Agreement: February 7, 2025
Client: City of Fort Atkinson
Consultant: Ruekert & Mielke, Inc.
Specific Project: 2026 Road Rehabilitation and Water Relay-Design

2. Description of Modifications

a. Consultant shall perform the following Additional Services:

1. Extend project limits for Jefferson Street to include section between White Street and E. Blackhawk Drive (~330 feet). This strategy will eliminate an orphaned section of very poor pavement. Work includes field survey, utility measuredowns, preparation of additional drawings, road design, water main design, and bidding document changes.
2. Extend storm sewer from Catch Basin NSC34 on N. High Street to White Street (~200 feet). Work includes field survey, utility measuredowns, preparation of additional drawings, storm sewer design, and bidding document changes.
3. Re-design south end of alley at Oak Street and Harrison Street intersection. This strategy will improve both pedestrian and vehicular safety. Work includes alternatives analysis and intersection design. Work does not include land surveying and mapping.
4. Extend project limits for Oak Street to include design of a cul-de-sac at north end. This strategy will eliminate a dead end, improve public works maintenance and emergency vehicle access, accommodate development of the Oak Limited Partnership property, and accommodate future extension of Oak Street to E. Cramer Street. Work includes field survey, preparation of additional drawings, road design, water main design, and bidding document changes. Work does not include land surveying and mapping.
5. Evaluate condition of sanitary sewer pipe and manholes within the project limits and include repairs that require excavation in drawings. Work includes field inspection of manholes, review of sanitary pipe televising reports, design of repair, inclusion of repair in drawings, and bidding document changes.
6. Evaluate condition of storm sewer pipe, manholes, and inlets within the project limits and include repairs that require excavation in drawings. Work includes field inspection of manholes, review of sanitary pipe televising reports, design of repair, inclusion of repair in drawings, and bidding document changes.

b. The Scope of Services currently authorized to be performed by Consultant in accordance with the Task Order and previous amendments, if any, is modified as follows:

1. Re-design Jefferson Street with a reduced roadway width between Hake Street and E. Blackhawk Drive (~1,800 feet). This strategy will reduce impervious area, reduce storm water runoff, and reduce construction cost. Work includes field survey, utility measuredowns, review of sewer televising, preparation of additional drawings, road design, water main design, and bidding document changes.
2. Re-design intersection at Heth Street and Clover Lane. This strategy will reduce impervious area, reduce storm water runoff, reduce construction cost, and improve pedestrian safety. Work includes alternatives analysis, intersection design, and storm sewer design.
3. Re-design intersection at Oak Street and Harrison Street. This strategy will reduce impervious area, reduce storm water runoff, reduce construction cost, and improve pedestrian safety. Work includes alternatives analysis and intersection design.

c. The responsibilities of Client with respect to the Task Order are modified as follows: None.

d. For the Additional Services or the modifications to services set forth above, Client shall pay Consultant the following additional or modified compensation:

e. The schedule for rendering services under this Task Order is modified as follows: None.

3. Task Order Summary (Reference only)	
a. Original Task Order amount:	\$61,644.00
b. Net change for prior amendments:	\$0.00
c. This amendment amount:	\$36,912.00
d. Adjusted Task Order amount:	\$98,556.00

The foregoing Task Order Summary is for reference only and does not alter the terms of the Task Order.

Client and Consultant hereby agree to modify the above-referenced Task Order as set forth in this Amendment. All provisions of the Agreement and Task Order not modified by this or previous Amendments remain in effect. The Effective Date of this Amendment is _____.

CLIENT:	CONSULTANT: Ruekert & Mielke, Inc.
Signature: _____ Rebecca Houseman	Signature: _____ Jason P. Lietha, P.E.
Title: _____ City Manager	Title: _____ Vice President
Date Signed: _____	Date Signed: _____

CITY OF FORT ATKINSON
2026 Water Main Relay and Road Rehabilitation
PROFESSIONAL FEE ESTIMATE

Task Order 2025-02: Amendment 1

SCOPE OF SERVICES	CATEGORY OF PERSONNEL														TOTAL HOURS	TOTAL LABOR COST
	\$185	\$189	\$184	\$184	\$160	\$150	\$145	\$149	\$122	\$95	\$171	\$155	\$112			
	E7 TL	E6 PM	E5 ENG	E4 ENG	E4 ENG	E3 ENG	E2 ENG	T3 TECH	T3 TECH	T1 TECH	ADMIN ASSIST	RLS SUR	S2 Crew Chief	SURVEY TECH		
DESIGN FEES																\$36,912
Extend Jefferson Street (White Street to E. Blackhawk Drive)																\$8,744
Submit Dig Request, Project Coordination, and Build Cadastral												6			6	\$1,026.00
Conduct Boots on Ground Topographic Survey, Measuredowns, and Data Download												2	9	9	20	\$2,745.00
Design and Prepare Roadway Plan Sheets		4				8				8					20	\$2,997.60
Design and Prepare Water Main Plan and Profile Sheets		1				3				6					10	\$1,397.40
Quantities and Opinion of Probable Construction Cost (30%, 60%, and 100%)		1				1									2	\$345.40
Bidding Document Updates		1									0.5				1.5	\$232.90
Extend Storm Sewer from N. High Street to White Street																\$3,116
Submit Dig Request, Project Coordination, and Build Cadastral												2			2	\$342.00
Conduct Boots on Ground Topographic Survey, Measuredowns, and Data Download													4	4	8	\$1,068.00
Design and Prepare Storm Sewer Plan and Profile Sheets		1				4				4					9	\$1,313.40
Quantities and Opinion of Probable Construction Cost (30%, 60%, and 100%)						1									1	\$160.00
Bidding Document Updates		1									0.5				1.5	\$232.90
Alley Re-Design on Oak Street																\$1,288
Alternatives Analysis		0.5				1						1			2.5	\$423.70
Design and Prepare Revised Alley Drawings		0.5				2				2					4.5	\$656.70
Quantities and Opinion of Probable Construction Cost (30%, 60%, and 100%)						1									1	\$160.00
Bidding Document Updates											0.5				0.5	\$47.50
Cul-de-sac at North End of Oak Street																\$5,191
Submit Dig Request, Project Coordination, and Build Cadastral												3			3	\$513.00
Conduct Boots on Ground Topographic Survey, Measuredowns, and Data Download													6	5	11	\$1,490.00
Design and Prepare Roadway Plan Sheets		2				4				8					14	\$1,986.80
Design and Prepare Water Main Plan and Profile Sheets		1				2				4					7	\$993.40
Quantities and Opinion of Probable Construction Cost (30%, 60%, and 100%)						1									1	\$160.00
Bidding Document Updates											0.5				0.5	\$47.50
Sanitary and Storm Sewer Evaluation																\$12,126
Field Inspection and Evaluation of Structures		8				16									24	\$4,043.20
Review Televising Video and Reports		4				24									28	\$4,581.60
Design Repairs and Include in Drawings		4				8									12	\$2,021.60
Quantities and Opinion of Probable Construction Cost (30%, 60%, and 100%)		2				2									4	\$690.80
Bidding Document Updates		4									0.5				4.5	\$789.10
Jefferson Street Narrow Design																\$2,708
Design and Prepare Roadway Plan Sheets		2				6				4					12	\$1,818.80
Quantities and Opinion of Probable Construction Cost (30%, 60%, and 100%)		1				2				2					5	\$749.40
Bidding Document Updates		0.5									0.5				1	\$140.20
Heth Street and Clover lane Intersection Re-Design																\$2,197
Alternatives Analysis		1				6				4					11	\$1,633.40
Design and Prepare Intersection Plan Sheets						2				2					4	\$564.00
Oak Street and Harrison Street Intersection Re-Design																\$657
Design and Prepare Intersection Plan Sheets		0.5				2				2					4.5	\$656.70
TOTAL HOURS	0	40	0	0	0	96	0	0	0	46	3	14	19	18	236	
DESIGN REIMBURSABLES																\$884
HALF SIZE PLAN REPRODUCTION (BASED ON 11"X17" SHEET)	4 SETS				33	SHEETS/SET			42.9 SF/SET				\$0.50 PER SF		\$85.80	
FULL SIZE PLAN REPRODUCTION (BASED ON 22"X34" SHEET)	0 SETS				33	SHEETS/SET			171.6 SF/SET				\$0.50 PER SF		\$0.00	
REPRODUCTION OF PROJECT MANUALS	4 SETS				275	SHEETS/SET							\$0.15 PER SHEET		\$165.00	
MILEAGE - ENGINEERS	140 MILEAGE												\$0.655 PER MILE		\$91.70	
MILEAGE - SURVEY	140 MILEAGE												\$0.865 PER MILE		\$121.10	
MILEAGE - CONSTRUCTION REVIEW TECHNICIAN	0 MILEAGE												\$0.695 PER MILE		\$0.00	
SURVEY EQUIPMENT - GPS								1 DAYS					\$140 PER DAY		\$140.00	
SURVEY EQUIPMENT - ROBOT								2 DAYS					\$140 PER DAY		\$280.00	
SURVEY EQUIPMENT - MANHOLE SCANNER								0 DAYS					\$200 PER DAY		\$0.00	
DRONE EQUIPMENT								0 DAYS					\$500 PER DAY		\$0.00	
GEOTECH SUBCONSULTANT																\$0
Drilling, boring logs, drilling coordination, Digger's, layout, soil analysis, and geotechnical report (10 to 5-feet)																\$0.00

TASK ORDER 2025-02

2026 Water Relay and Road Rehabilitation

This is Task Order No. 2025-02,
consisting of 4 pages

Task Order

In accordance with Paragraph 1.01 of the Agreement Between Owner and Engineer for Professional Services – Task Order Edition dated June 21, 2022, and amended on January 21, 2025 ("Agreement"), Owner and Engineer agree as follows:

1. Specific Project Data

A. Title: 2026 Water Relay and Road Rehabilitation

B. Description: Project generally consists of approximately 4,200 linear feet of water main relay and road rehabilitation (pulverize and overlay) on Jefferson Street (White Street – Hake Street), White Street (Jefferson Street – Terminus), Clover Lane (High Street – Rogers Street), and Oak Street (North of Harrison Street). Improvements include curb and gutter spot replacement, sidewalk infill.

Task order includes survey and engineering design related to the proposed improvements. Plans, specifications, and construction cost estimates will be prepared, and the project will be bid through the QuestCDN online platform. Project includes a Construction Site Storm Water Permit from WDNR as well as approval from WDNR for public water distribution system improvements.

Task order does not include construction administration, inspection, construction staking, sanitary sewer improvements, and storm sewer improvements.

2. Services of Engineer

A. Phase 1 – Data Collection

- a. Submit Dig Request, Project Coordination, and Build Cadastral
- b. Set Control and Conduct Boots on Ground Topographic Survey (Assume 10' outside ROW)
- c. Measuredowns (Sanitary and Storm Structures, Water Valves)
- d. Property Iron Recon to Confirm ROW
- e. Survey Data Download, Quality Control, and Measuredown Processing
- f. Drone Mapping (Includes flight prep/coordination, flight, and data processing)
- g. Engineering field check

B. Phase 2 – Plan Design

- a. Project administration
- b. Prepare Pipe Networks and Setup Plan Sheets; Import Base files
- c. Design and Prepare Roadway Plan-Plan Sheets (Assume 6 Sheets)(Includes Sidewalk Infill)
- d. Design and Prepare Water Main Plan and Profile Sheets (Assume 11 Sheets)
- e. Design and Prepare Erosion Control and Traffic Control Drawings (Assume 8 Sheets)
- f. Prepare Cover, Index, General Notes, Typical Sections, and Construction Details (Assume 15 Sheets)
- g. Provide Preliminary Drawings to Utilities and Follow Up Coordination
- h. Quantities and Opinion of Probable Construction Cost (30%, 60%, and 100%)
- i. Prepare Project Manual
- j. Prepare and submit water main extension application to WDNR
- k. Prepare and Submit NOI Permit to DNR

TASK ORDER 2025-02

2026 Water Relay and Road Rehabilitation

- C. Phase 3 – Bidding
 - a. Coordination with City
 - b. Coordination with potential bidders
 - c. Facilitate virtual bid opening
 - d. Review bids and prepare bid tabulation
 - e. Issue Notice of Award (NOA)

- D. Phase 4 – Construction
 - a. N/A

- E. Phase 5 – Meetings
 - a. Project kick-off meeting
 - b. Site Visit with City Staff (Curb, Sidewalk, and Drive Apron Conditions, Sump Locations, and Pavement Condition)
 - c. 30%, 60%, and 90% Plan Review Meetings with City Staff
 - d. Progress Check-In Meetings via Teams (Assume 6 Meetings)

3. Owner's Responsibilities

- A. Review and respond to design and/or construction related matters in a timely manner.
- B. Clean debris from all storm sewer inlets prior to survey.
- C. Provide sanitary sewer and storm sewer point repair information.
- D. Attend meetings and site visits as required.

4. Times for Rendering Services

<u>Phase</u>	<u>Estimated Completion Date</u>
Field work	April 2025
Preliminary design	June 2025
Final design	October 2025
Bidding	December 2025
Bid Opening	January 2026

5. Payments to Engineer

- A. Owner shall pay Engineer for services rendered as follows:

Category of Services	Compensation Method	Estimate of Compensation for Services
Design	Standard Hourly Rates	\$57,544
Geotechnical	Subconsultant Cost + 10%	\$4,100
TOTAL =		\$61,644

TASK ORDER 2025-02

2026 Water Relay and Road Rehabilitation

- B. The terms of payment are set forth in Article 4 of the Agreement.
- C. Refer to Exhibit B for detailed manhour estimate.
- 6. Other Modifications to Agreement:
None.
- 7. Attachments:
Exhibit B – Detailed Professional Fee Estimate
- 8. Documents Incorporated by Reference:
None.
- 9. Terms and Conditions: Execution of this Task Order by Owner and Engineer shall make it subject to the terms and conditions of the Agreement (as modified above), which Agreement is incorporated by this reference. Engineer is authorized to begin performance upon its receipt of a copy of this Task Order signed by Owner.

TASK ORDER 2025-02

2026 Water Relay and Road Rehabilitation

The Effective Date of this Task Order is _____.

OWNER: City of Fort Atkinson

ENGINEER: Ruekert & Mielke, Inc.

By: _____

By: _____

Name: Rebecca Houseman

Name: Jason P. Lietha, P.E.

Title: City Manager

Title: Senior Vice President

DESIGNATED REPRESENTATIVE FOR TASK ORDER: (Per Paragraph 7.03.A):

DESIGNATED REPRESENTATIVE FOR TASK ORDER: (Per Paragraph 7.03.A):

Name: Rebecca Houseman

Name: Andrew W. Burt, P.E.

Title: City Manager

Title: Project Manager

Phone Number: 920-397-9901

Phone Number: 608-819-2600

E-Mail Address: rhouseman@fortatkinsonwi.gov

E-Mail Address: aburt@ruekert-mielke.com

CITY OF FORT ATKINSON
Water Main Relay and Road Rehabilitation (2026 Construction)
PROFESSIONAL FEE ESTIMATE

SCOPE OF SERVICES	CATEGORY OF PERSONNEL											TOTAL HOURS	TOTAL LABOR COST
	\$185	\$184	\$160	\$150	\$149	\$122	\$95	\$171	\$155	\$112			
	E7 TL	E6 PM	E4 ENG	E3 ENG	E2 ENG	T3 TECH	T1 TECH	ADMIN ASSIST	RLS SUR	S2 Crew Chief	SURVEY TECH		
DESIGN FEES	0	23	38	51	2	44	94	14	8	58	52	386	\$57,544
PHASE 1 - DATA COLLECTION													\$18,406
Submit Dig Request, Project Coordination, and Build Cadastral									8	4		12	\$1,988.00
Set Control and Conduct Boots on Ground Topographic Survey (Assume 10' outside ROW)										20	20	40	\$5,340.00
Measuredowns (Sanitary and Storm Structures, Water Valves)				1						18	18	37	\$4,966.00
Property Iron Recon to Confirm ROW										10	10	20	\$2,670.00
Survey Data Download, Quality Control, and Measuredown Processing				2						6	4	12	\$1,698.00
Drone Mapping (Includes flight prep/coordination, flight, and data processing)			6									6	\$1,104.00
Engineering Field Check				4								4	\$640.00
TOTAL HOURS	0	0	6	7	0	0	0	0	8	58	52	131	
PHASE 2 - PLAN DESIGN													\$30,603
Project Administration		2	4									8	\$1,484.80
Prepare Pipe Networks and Setup Plan Sheets; Import Base files				2		8	40					50	\$6,392.00
Design and Prepare Roadway Plan-Plan Sheets (Assume 6 Sheets)(Includes Sidewalk Infill)		2	4	8		10	24					48	\$6,804.80
Design and Prepare Water Main Plan and Profile Sheets (Assume 11 Sheets)		4	4	4		24	16					52	\$7,645.60
Design and Prepare Erosion Control and Traffic Control Drawings (Assume 8 Sheets)				1	2		4					7	\$948.00
Prepare Cover, Index, General Notes, Typical Sections, and Construction Details (Assume 15 Sheets)		1		2			8					11	\$1,481.40
Provide Preliminary Drawings to Utilities and Follow Up Coordination				2								2	\$320.00
Quantities and Opinion of Probable Construction Cost (30%, 60%, and 100%)		2	1	4			2					9	\$1,438.80
Prepare Project Manual		8						12				20	\$2,623.20
Prepare and Submit Water Main Extension Application to DNR			0.5	4								4.5	\$732.00
Prepare and Submit NOI Permit to DNR			0.5	4								4.5	\$732.00
TOTAL HOURS	0	19	14	31	2	42	94	12	0	0	0	216	
PHASE 3 - BIDDING													\$1,916
General Coordination with City		1	1									2	\$369.40
General Coordination with Potential Bidders		1	2			2						5	\$851.40
Facilitate Virtual Bid Opening		1						1				2	\$280.40
Review Bids and Prepare Bid Tabulation				1								1	\$160.00
Issue Notice of Award				1				1				2	\$255.00
TOTAL HOURS	0	3	3	2	0	2	0	2	0	0	0	12	
PHASE 4 - CONSTRUCTION													\$0
TOTAL HOURS	0	0	0	0	0	0	0	0	0	0	0	0	
PHASE 5 - MEETINGS													\$4,705
Project Kick-Off Meeting		1	1	1								3	\$529.40
Site Visit with City Staff (Curb, Sidewalk, and Drive Apron Conditions, Sump Locations, and Pavement Condition)			8	4								12	\$2,112.00
30%, 60%, and 90% Plan Review Meetings with City Staff			3	3								6	\$1,032.00
Progress Check-In Meetings via Teams (Assume 6 Meetings)			3	3								6	\$1,032.00
TOTAL HOURS	0	1	15	11	0	0	0	0	0	0	0	27	
DESIGN REIMBURSABLES													\$1,913
HALF SIZE PLAN REPRODUCTION (BASED ON 11"X17" SHEET)	4 SETS			33 SHEETS/SET		42.9 SF/SET				\$0.50 PER SF			\$85.80
FULL SIZE PLAN REPRODUCTION (BASED ON 22"X34" SHEET)	0 SETS			33 SHEETS/SET		171.6 SF/SET				\$0.50 PER SF			\$0.00
REPRODUCTION OF PROJECT MANUALS	4 SETS			275 SHEETS/SET						\$0.15 PER SHEET			\$165.00
MILEAGE - ENGINEERS	350 MILEAGE									\$0.655 PER MILE			\$229.25
MILEAGE - SURVEY	420 MILEAGE									\$0.865 PER MILE			\$363.30
MILEAGE - CONSTRUCTION REVIEW TECHNICIAN	0 MILEAGE									\$0.695 PER MILE			\$0.00
SURVEY EQUIPMENT - GPS						1 DAYS				\$140 PER DAY			\$140.00
SURVEY EQUIPMENT - ROBOT						2 DAYS				\$140 PER DAY			\$280.00
SURVEY EQUIPMENT - MANHOLE SCANNER						2 DAYS				\$200 PER DAY			\$400.00
DRONE EQUIPMENT						0.5 DAYS				\$500 PER DAY			\$250.00
GEOTECH SUBCONSULTANT													\$4,100
Drilling, boring logs, drilling coordination, Digger's, layout, soil analysis, and geotechnical report (10 to 5-feet)													\$4,100.00



MEMORANDUM

DATE: January 21, 2025

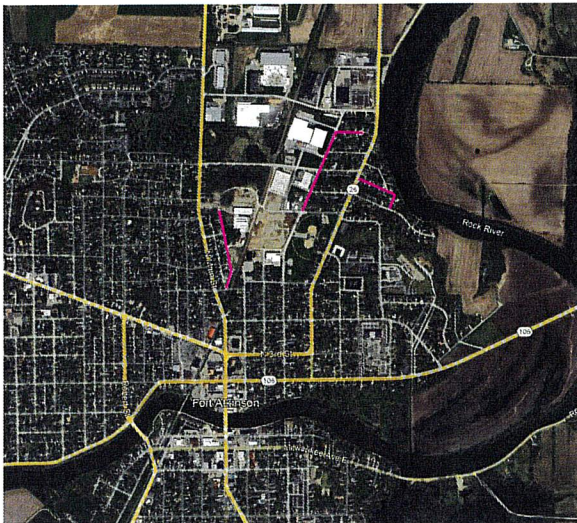
TO: Fort Atkinson City Council

FROM: Jeff Armstrong, Water Utility Superintendent

RE: Review and possible action on a design contract for the City's 2026 water main replacement and street improvements (Armstrong, Water Utility Superintendent)

BACKGROUND

In 2026, the City's water main replacement and road construction will focus on Jefferson St., White St., Clover Ln., and Oak St. The project will include sidewalk as a bid alternate to infill missing areas. Sanitary and storm main and manholes will be evaluated by the City staff and point repairs will be added to the project design as needed.



The City will begin design early in 2025 for the project with the anticipation of putting out bids for the work in the 4th quarter of 2025, again pushing for the advantages provided with an early bid date for construction in 2026.

DISCUSSION

Twelve firms were solicited for the work. A total of four proposals were received. This work is uncomplicated in both the project design and the schedule required. Differentiation of the

proposals really focuses on the cost proposal and the stated ability to meet the schedule for bid documents. To that end, the bids ranged from a high of \$98,000 to a low of \$61,000. The summary of the proposal review is attached. Ruekert-Mielke provided the lowest bid on their design proposal. All proposals are included with this memo, and all four companies have worked in the City previously.

FINANCIAL ANALYSIS

This work involves aspects of stormwater, water, wastewater, and road design and is assigned a percentage of the design fees to each of these four accounts within the three utilities and Fund 5 of the general fund.

RECOMMENDATION

Staff recommends awarding the design contract for the City's 2026 water main replacement and street improvements to Ruekert & Mielke in an amount not to exceed \$61,644.00 and authorizing the City Manager to execute the contract for these services.

ATTACHMENTS

1. Fort Atkinson 2026 Water Main and Road Rehab RFP
2. Graef Water Relay and Road Rehab (2026 Construction)_Proposal_FINAL
3. MSA WI_Fort Atkinson_Water Relay and Road Rehab_02959031_Final
4. R&M Fort Atkinson - 2026 Water Relay & Road Rehab
5. Vierbicher 2025-01-08_Water Relay and Road Rehab
6. Evaluation Table 2026 Water RFP

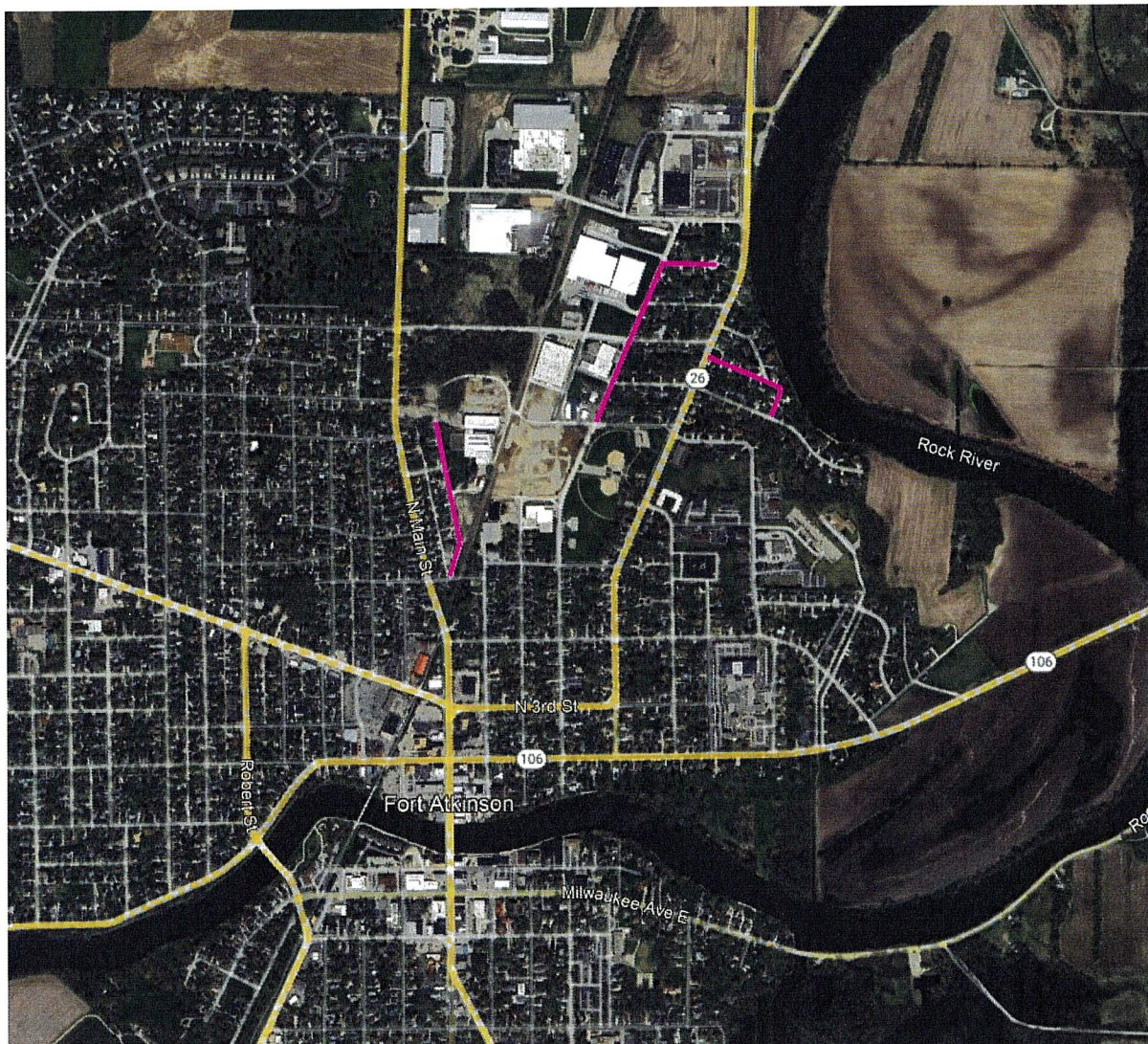


**CITY OF FORT ATKINSON, WI
REQUEST FOR PROPOSAL (RFP)
WATER RELAY AND ROAD REHAB
(2026 CONSTRUCTION)**

Contact: Jeff Armstrong – 920.397.9901 jarmstrong@fortatkinsonwi.gov

Proposal Deadline: January 8, 2025 at 12 PM – email proposals only.

1.0 General RFP Information – Water Relay / Road Rehab



This RFP is for design of water main and road rehabilitation for the City of Fort Atkinson on Jefferson St, White St, Clover Ln, and Oak St. The project will include sidewalk as a bid alternate to infill missing areas. Sanitary and Storm main and manholes will be evaluated by the City and point repairs added to the project design as needed. The consultant should assume coordination of borings. Sumps in the area discharging to the street will be added to an installed storm manifold and plumbed to storm sewer.

2.0 Existing Data

The City maintains a [GIS system](#) that can be accessed with read only content.

Some as-built information exists on the roads.

3.0 Scope, Budget, Schedule

Firms should define their own approach to designing these improvements in the scope of work. This project should deliver full PSE's as well as necessary permits required to construct improvements. No public meetings are needed, just consistent progress checks with City Engineer and Project Manager should be sufficient. Plans, specs, and estimates should be developed at the 30%, 60%, and DRAFT Final milestones.

The estimate for design services should correspond to the scope tasks, with hours for each individual discipline/staff member listed. Scope and budget should be developed up to the bid award milestone. The selected consultant may be engaged for construction period services that would begin following bid award and run through as-built and construction closeout.

Construction will commence in spring 2026. Schedule is below:

June 1 2025 – 30% Design with estimates

August 1 2025 – 60% design with estimates – need solid numbers for the 2026 budget

October 1, 2025 – Draft Final plans and estimates for review

December 1, 2025 - Construction documents issued for bid on Quest

Bid Award at 1st or 2nd Council meeting in 2026

4.0 Submittal Instructions

Proposals must be submitted to the City of Fort Atkinson by January 8, 2025 at 12 PM via email to the Water Utility Superintendent – Jeff Armstrong at jarmstrong@fortatkinsonwi.gov

Please reference all submittal requirements listed below as a guide when compiling your proposals, in particular the page limits. This proposal is intended to focus your effort efficiently.

All submittals should follow this format:

1. Statement of interest (1 page cover letter)
 - Briefly state your firm's interest in designing this project on behalf of the City of Fort Atkinson

2. Project Team Expertise and Qualifications (1page)
 - Briefly describe your team's project manager responsible for the design work
 - Note briefly the names and expertise of staff assigned to the project

3. Project Scope and Schedule (unlimited)
 - Define the scope by task with associated assumptions and deliverables
 - Develop a schedule based on the milestones noted above

4. Cost Estimate (1 page - table format)

- Scope tasks should be listed, hours allotted by task and individual in table format

5.0 Proposal Evaluation

All firms will be qualified for this project. Cost is often a significant factor, however, Fort Atkinson has not selected the low bidder for design services in several instances. Each proposal will be evaluated based on the following criteria;

- Adherence to required proposal format
- PM experience
- Scope completeness
- Cost

Questions can be directed to the Water Utility Superintendent – Jeff Armstrong. Questions asked less than 3 days prior to the proposal deadline may not be answered.

Jeff Armstrong

920.397.9901

jarmstrong@fortatkinsonwi.gov

Fort Atkinson Municipal Building

101 N Main Street

Fort Atkinson, WI 53538

CITY OF FORT ATKINSON



Request For Proposal:
Water Relay and Road Rehab (2026 Construction)
January 8, 2025



January 8, 2025

Jeff Armstrong
Water Utility Superintendent
City of Fort Atkinson
101 N Main Street
Fort Atkinson, WI 53538

Re: Request For Proposal: Water Relay and Road Rehab (2026 Construction)

Dear Mr. Armstrong:

Ruekert & Mielke, Inc. is thrilled to submit our proposal for the Fort Atkinson 2026 Water Main and Road Rehabilitation project. Our dedicated team of professionals has extensive experience working alongside the City, and we are eager to bring our technical and local expertise to this project.

We are proud to have contributed to the development of the City's standard specifications, which ensures our deep familiarity with your requirements and expectations. Our team has a proven track record of successful projects with the City, including the 2022, 2023, and 2024 Water Main Relay and Roadway Rehabilitation projects. This history demonstrates our ability to seamlessly integrate with your team and deliver results that meet your high standards.

Additionally, our familiarity with the predominant soils in the area and our expertise in managing poor subgrade soils will be invaluable in ensuring the project's success. We understand the challenges posed by these conditions and have the experience and strategies necessary to address them effectively.

Our commitment to effective communication will be key to ensuring the success of this project. We believe that clear, consistent communication is essential for collaboration and achieving the best outcomes.

Thank you for considering our proposal. We look forward to the opportunity to work alongside the City once again.

RUEKERT & MIELKE, INC.



Andrew W. Burt, P.E. (WI, IL), LEED Green Assoc, ENV SP
Senior Project Manager
aburt@ruekert-mielke.com

APPROACH

Experience Capitalization

Working closely with the City of Fort Atkinson (City) on the previous four Water Main Relay and Road Rehabilitation projects has allowed Ruekert & Mielke, Inc. (R/M) to clearly understand the City's project goals and expectations. This experience has also helped to develop an approach and schedule that will ensure a long-term successful project for the City. In addition, we have conducted a thorough site visit of each street and reviewed the City's GIS data. During this time R/M also assisted the City in the development of standard specifications used on these as well as other projects.

Consistent Communication

Consistent progress check-ins with the City Engineer have proven to be invaluable, not only during construction but also during design. A real sense of "working with you" as opposed to "working for you" emerges during these meetings. We can coordinate services, identify and address issues as they arise during all phases of the project, maintain efficiency to keep the project on schedule, and introduce cost savings by listening carefully and addressing the concerns of staff in the bidding documents. With the recent role changes, R/M views this as an opportunity to further enhance communication by having direct access to collaborate with the City Manager.

Aging Water System

The vintage spun cast-iron water main continues to plague the City in many areas. This material has a long history of failure due to its poor strength and susceptibility to corrosion. Because of the high potential for failure during excavation, it will be important to evaluate the horizontal location of the new water main. Selecting the ideal location has numerous benefits including: (1) reduced likelihood of system failure and emergency outages; (2) lower bid unit prices as compared to a relay near the existing main; (3) reduced impacts to residents; and (4) eliminate the need to employ a temporary water system.

R/M will review the existing water main in terms of its ability to optimize isolation, maintenance, and protection all while improving accessibility for fire protection. Our team will collaborate with the Water Utility to identify opportunities to improve the distribution system with additional valves and hydrants.

While the water main certainly should be replaced, there may be an opportunity to save costs by not replacing all water service curb stops. This approach will be discussed in detail with the City and Water Utility as well as local contractors to determine if it is cost-effective.

Road Rehabilitation

Our team has collaborated with CGC, Inc. to develop a soil boring plan to establish representative pavement sections and recommendations for a cost-effective pavement design. Site visits have revealed pavements in a very similar condition to those that we have rehabilitated in recent years. Pulverizing the existing asphalt with some of the existing base material has proven very effective at establishing a new base to support the new asphalt overlay. This method has also been shown to limit the amount of excavation below the subgrade (EBS) required by not disturbing the marginal sub-base material. Of course, we will defer the final recommendation until the soil borings are completed and we discuss it with City staff.

Our team also plans to evaluate the curb condition, pavement geometry, existing cross-sections, driveway aprons, and sidewalk. We feel strongly that it would not be right to simply reconstruct what is present when certain improvements, sometimes minor, can be made that would improve safety, functionality, and resiliency.

Curbs generally show signs of poor foundation preparation and base that we have seen on past projects. Over time this has led to a "tipping" back of the curb as well as differential settlement at the joints. On streets with sufficient longitudinal slope, this might not be a huge problem but on a relatively flat street, these failures are only exacerbated when storm

water runoff is not properly conveyed to the storm sewer system. Curb conditions will be closely evaluated with City staff and comparative cost estimates for both spot repair and full replacement will be prepared. Spot repairs will be surveyed so they can be represented accurately in the bidding documents.

Sidewalk Infill

Aside from the west side of Oak Street, the remaining streets do not currently have sidewalks. Some potential challenges such as grade, trees, utility poles and guy wires, and landscaping were identified as potential challenges that will be surveyed to develop an accurate construction cost estimate. Similarly to past projects, R/M will include sidewalk infill as a mandatory alternate to provide the City flexibility when comparing contractor bids with City budgets.

Sanitary and Storm Sewer

R/M understands that the City will be evaluating the sanitary and storm sewer collection systems for possible repairs that would be added to the project. History has shown that we can expect at least a handful of sanitary sewer point repairs as well as some replacement of storm sewer to improve drainage.

Private Sumps

Sumps that discharge directly to the public street or sidewalk present a hazard during the winter months when the water freezes. Our team will work diligently to identify these at the beginning of the project so they can (1) be surveyed; and (2) be connected to a manifold system and conveyed to the nearest storm sewer (when cost effective).

Accurate Construction Cost Estimates

R/M takes great pride in preparing accurate opinions of probable construction costs. This information is relied upon by our clients when they are reviewing project budgets and determining how much infrastructure they can afford to replace. In 2022, our base construction estimate was within 2.9% of the lowest bidder, in 2023 it was within 8.5% of the

lowest bidder, and in 2024 it was within less than 1.0%.

Unambiguous Plans

We routinely receive compliments from contractors as well as utility companies as to the accuracy and clarity of our design plans. This often translates to competitive bids as well as minimal change orders. In 2022, all bids received were within 14% of each other and did not have a change order except to close out the project. In 2023 the bids received were within about 4% of each other and had approximately 1% in change orders. In 2024 all bids received were within 34% of each other and had approximately 10% in change orders, largely due to added scope.

Bottom Line

Many engineers could provide the City with a design, but what separates R/M from the rest is (1) our attention to detail; (2) our regular communication which includes listening to the client; and (3) years of experience with the same type of work proposed. By holding paramount these things, we will deliver a project that saves costs and exceeds your expectations.

PROJECT TEAM EXPERTISE & QUALIFICATIONS

Our recent project experience with the City showcases our precision in cost estimations that align closely with project budgets. Our team's agility in adapting to new information and our focus on the City's long-term interests make Ruekert & Mielke, Inc. an ideal partner for this project. This combination of accuracy, foresight, and adaptability ensures a successful completion in alignment with the City's goals for the 2026 Water Relay & Road Rehabilitation project. Our team consists of the same core members that have completed the 2022-2024 Water Relay & Road Rehabilitation projects with the addition of Sam Bowman.

Andrew W. Burt, P.E. (WI, IL), LEED Green Assoc, ENV SP | Senior Project Manager



Andy Burt will serve as the Project Manager and point of contact for City staff. He will also serve as the Lead Technical Expert responsible for evaluating existing conditions and developing design alternatives and recommendations for the roadway and water main improvements. His attention to detail, extensive relevant experience, and project management skills will ensure that this project is delivered on time, on budget, and done right.

Andy has worked on municipal infrastructure projects for nearly 25 years. His career has included extensive design of new and reconstruction of existing local streets and collector streets. Roadway design has included planning, grant funding, survey, public information meetings, sanitary sewer collection, water main distribution, storm sewer, and storm water management facilities. Andy also has extensive construction administration phase experience that has included bidding, permit/approval applications, recommendation, and award of projects, contracting, preconstruction meetings, submittal review, review and recommendation of pay requests, change orders, request for information (RFI), construction staking coordination, construction observation, and project

Your Infrastructure Ally

5

closeout including record document preparation.

Brian E. Toczyski | Project Engineer



Brian Toczyski will serve as Project Engineer and will assist with design construction administration. He will also be responsible for coordination with survey crews and the geotechnical consultant, and preparation of construction cost estimates. Brian's excellent communication skills and experience with the design and construction of street and utility projects will be invaluable for this project.

Samantha E. Boman | Project Engineer



Sam Boman will serve as Project Engineer and will assist with design of the roadway and utility improvements. Sam's resourceful and results-driven personality paired with her experience in design of street and utilities make her an asset to the R/M team.

Justin T. Klieve | Engineer/CAD Technician



Justin is a civil designer/drafter who specializes in Civil 3D and takes engineer's design ideas and brings them to life. He also specializes in dynamic grading in Civil 3D to always provide the client with an accurate surface file for construction. He has graded various large site development projects around the state. Justin is also certified as a Part 107 Remote Drone Pilot and can process various types of reality capture data to provide the client with very helpful information. Justin has prepared design drawings for past Fort Atkinson projects.

ruekertmielke.com

PROJECT SCOPE

- Conduct project kick-off meeting with City staff and exchange available background information.
- Conduct a site visit with City staff to review project site conditions such as curb condition, driveway apron conditions, known pavement and/or drainage concerns, sump discharges, and water main issues. We will also review the existing sidewalk for damaged sections as well as curb ramps that are not ADA-compliant. Lastly, we will review sidewalk infill locations for possible challenges.
- Conduct a field survey to gather all underground utility locations in the project site along with topographic information of roadways. The field survey will also pick up spot replacement of curb, sidewalk, and driveway aprons identified during the site visit. Property irons will be located and surveyed to allow for accurate mapping of the right-of-way.
- We are proposing a combined effort of both a drone survey as well as a traditional boots-on-the-ground survey. While the drone can capture a tremendous amount of data in a short time, we recognized the need for traditional surveys due to the tree cover and other constraints. This approach has proven to be the most efficient yet provides the most comprehensive data for design.
- Conduct buried utility measure-downs as necessary to accurately develop vertical profiles of existing sanitary sewer, storm sewer, and water main. We consider this due diligence to reduce ambiguity in our plans which can lead to costly change orders.
- Compile all survey data, complete cadastral mapping of right-of-way, create base mapping, and prepare a surface model for design.
- Design water main to meet City and State standards as well as improve the reliability and flexibility of the distribution system.
- Design proposed roadway profiles and create typical proposed street cross sections.
- Our team understands each roadway is unique, so we propose to evaluate each for opportunities to cost-effectively improve safety, functionality, and resiliency.
- Coordinate and perform geotechnical borings. We have collaborated with CGC, Inc. as the geotechnical engineers to develop a boring plan for this project. They have extensive experience in Jefferson County including in the City of Fort Atkinson. Our proposed approach includes a total of 10 borings to 5 feet in depth. The number and location of borings will provide a good representation of the existing road cross-section. We anticipate reviewing the boring plan with City staff and adjusting as necessary.
- Complete pavement design for each road segment based on geotechnical borings.
- Prepare proposed intersection design details as necessary.
- Prepare proposed design of manifold system to intercept sump pump pipes discharging to roadway.
- Prepare project overview, erosion control, general notes, and standard detail sheets for the project.
- Provide preliminary drawings to utility companies for review.
- Prepare bid documents and standard specifications.
- Generate bid items, calculate proposed quantities, and prepare opinions of probable construction cost at 30% and 60% milestones.
- Conduct a design review meeting with City staff after preliminary and 90% design completion. Progress check-ins with the City Engineer will be conducted as needed between plan reviews.

- Update preliminary and 90% plans and specifications based on City staff comments. No PIM/Public Hearings are anticipated for this project.
- Prepare final opinion of probable construction cost to validate base bid and alternate bid selection.
- Prepare and submit applications to WDNR for approval of water main improvements and construction site storm water permit.
- Provide one full-size and three reduced size hardcopy plan sets, and one digital (pdf) copy of the final plans and specifications to the City's Engineering Department.
- Facilitate bidding by uploading bid documents to the Quest online bid platform, conduct virtual bid opening, prepare bid tabulation, and prepare Notice of Award.

If selected to work with the City, R/M proposes a brief discussion with City staff to determine the final scope of services that will be the basis of the Agreement with the City.

Our past project experience has sometimes required additional scope of services that impact design and construction. The following items are not included in our proposed scope, either because we anticipate they will be completed by the City or may not be required for the project. Any of these items can certainly be negotiated and added to our contract:

- Wetland investigation, delineation, or report creation.
- Design related to any contamination within the project limits.
- Archeological or historical investigation.
- Water modeling or fire flow testing.
- Laser scanning of structures.
- Exporting of GIS data.
- GIS app setup to make it available to City throughout survey process.
- Proposed roadway cross sections.
- Design of storm sewer or sanitary sewer improvements.
- Public meetings.
- Soil borings beyond what is presented above.

SCHEDULE

FEBRUARY 4, 2025

Approval of contract.

FEBRUARY 10, 2025

Notice to Proceed. Kickoff meeting with City staff.

MARCH 17, 2025

Site walk with City staff. Mark soil boring locations / Call in Digger's request. Develop sanitary and storm sewer map identifying pipes and structures to evaluate.

MARCH 24, 2025

Begin field survey. Conduct soil borings.

MARCH 31, 2025

Start water main and street improvement design.

JUNE 1, 2025

Complete 30% design and cost estimate. Meeting with City staff. The City completes evaluation of sanitary sewer and storm sewer.

AUGUST 1, 2025

Complete 60% design and update cost estimate. Incorporate sanitary and storm sewer repairs into project. Submit plans to WE Energies.

SEPTEMBER 1, 2025

Complete 90% design and update cost estimate. Meeting with City staff.

OCTOBER 1, 2025

Finalize bid documents and deliver to City. Submit water main approval and construction erosion control permit applications to Wisconsin DNR.

DECEMBER 1, 2025

Upload bid documents to Quest online bid platform.

JANUARY 8, 2026

Bid Opening.

JANUARY 20, 2026

Bid Award. Issue Notice of Award.

The schedule above is based on the assumed contract approval of February 4, 2025. If contract approval is delayed, we have sufficient time built into the schedule to complete bid documents by October 1, 2025. This will allow adequate time to submit and obtain water main and construction site erosion control approval from the DNR prior to bid opening. We have also built in time for proper assessment of existing conditions and evaluation of solution alternatives. Upon selection, R/M will collaborate with City staff to finalize the schedule as necessary and determine process for obtaining sanitary and storm sewer evaluations.

**CITY OF FORT ATKINSON
Water Main Relay and Road Rehabilitation (2026 Construction)
PROFESSIONAL FEE ESTIMATE**

SCOPE OF SERVICES	CATEGORY OF PERSONNEL																	TOTAL LABOR COST				
	\$185 E7 TL	\$185 E6 PM	\$184 E4 ENG	\$160 E3 ENG	\$150 E2 ENG	\$149 T3 TECH	\$122 T1 TECH	\$95 ADMIN ASSIST	\$171 RLS SUR	\$185 S2 Crew Chief	\$112 SURVEY TECH	TOTAL HOURS										
0	23	38	51	2	44	94	14	8	58	52	386						\$57,544					
PHASE 1 - DATA COLLECTION																		\$18,406				
Submit Dig Request, Project Coordination, and Build Cadastral Set Control and Conduct Boots on Ground Topographic Survey (Assume 10' outside ROW)													8				4				12	\$1,988.00
Measurements (Sanitary and Storm Structures, Water Valves)				1														18			40	\$5,340.00
Property Iron Recon to Confirm ROW																		10			37	\$4,966.00
Survey Data Download, Quality Control, and Measuredown Processing				2														6			20	\$2,670.00
Drone Mapping (Includes flight prep/coordination, flight, and data processing)			6																		12	\$1,698.00
Engineering Field Check				4																	6	\$1,104.00
TOTAL HOURS	0	0	6	7	0	0	0	0	0	0	0	0	8	0	0	0	58	52	0	131	\$640.00	
PHASE 2 - PLAN DESIGN																		\$30,603				
Project Administration		2	4																		8	\$1,484.80
Prepare Pipe Networks and Setup Plan Sheets; Import Base files				2						8	40										50	\$6,392.00
Design and Prepare Roadway Plan-Plan Sheets (Assume 6 Sheets)/(Includes Sidewalk Infill)		2	4	8						10	24										48	\$6,804.80
Design and Prepare Water Main Plan and Profile Sheets (Assume 11 Sheets)		4	4	4						24	16										52	\$7,645.60
Design and Prepare Erosion Control and Traffic Control Drawings (Assume 8 Sheets)				1						2	4										7	\$948.00
Prepare Cover, Index, General Notes, and Construction Details (Assume 15 Sheets)		1		2							8										11	\$1,481.40
Provide Preliminary Drawings to Utilities and Follow Up Coordination				2							2										2	\$320.00
Quantities and Opinion of Probable Construction Cost (30%, 60%, and 100%)				2		1					2										9	\$1,438.80
Prepare Project Manual		8											12								20	\$2,623.20
Prepare and Submit Water Main Extension Application to DNR				4																	4.5	\$732.00
Prepare and Submit NOI Permit to DNR			0.5	4																	4.5	\$732.00
TOTAL HOURS	0	19	14	31	2	42	94	12	0	0	0	0	0	0	0	0	0	0	0	216	\$1,916	
PHASE 3 - BIDDING																		\$369.40				
General Coordination with City		1	1																		2	\$369.40
General Coordination with Potential Bidders		1	2							2											5	\$851.40
Facilitate Virtual Bid Opening		1											1								2	\$280.40
Review Bids and Prepare Bid Tabulation				1																	1	\$160.00
Issue Notice of Award				1									1								2	\$255.00
TOTAL HOURS	0	3	3	2	0	2	0	2	0	2	0	0	0	0	0	0	0	0	0	12	\$0	
PHASE 4 - CONSTRUCTION																		\$4,705				
TOTAL HOURS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	\$4,705	
PHASE 5 - MEETINGS																		\$529.40				
Project Kick-Off Meeting		1	1	1																	3	\$529.40
Site Visit with City Staff (Curb, Sidewalk, and Drive Apron Conditions, Sump Locations, and Pavement Condition)			8	4																	12	\$2,112.00
30%, 60%, and 90% Plan Review Meetings with City Staff			3	3																	6	\$1,032.00
Progress Check-In Meetings via Teams (Assume 6 Meetings)			3	3																	6	\$1,032.00
TOTAL HOURS	0	1	15	11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	27	\$1,913	
DESIGN REIMBURSABLES																		\$85.80				
HALF SIZE PLAN REPRODUCTION (BASED ON 11"x17" SHEET)	4 SETS			33 SHEETS/SET																		\$0.50 PER SF
FULL SIZE PLAN REPRODUCTION (BASED ON 22"x34" SHEET)	0 SETS			33 SHEETS/SET																		\$0.50 PER SF
REPRODUCTION OF PROJECT MANUALS	4 SETS			275 SHEETS/SET																		\$0.15 PER SHEET
MILEAGE - ENGINEERS	350 MILEAGE																					\$0.655 PER MILE
MILEAGE - SURVEY	420 MILEAGE																					\$0.865 PER MILE
MILEAGE - CONSTRUCTION REVIEW TECHNICIAN	0 MILEAGE																					\$0.695 PER MILE
SURVEY EQUIPMENT - GPS																						\$140 PER DAY
SURVEY EQUIPMENT - ROBOT																						\$140 PER DAY
SURVEY EQUIPMENT - MANHOLE SCANNER																						\$200 PER DAY
DRONE EQUIPMENT																						\$500 PER DAY
GEOTECH SUBCONSULTANT																		\$4,100				
Drilling, boring logs, drilling coordination, Diggers, layout, soil analysis, and geotechnical report (10 to 5-feet)																						\$4,100.00

RECENT RELATED PROJECT EXAMPLES**City of Fort Atkinson, WI – 2022 Water Main Relay and Roadway Rehabilitation**

The City of Fort Atkinson was awarded a CDBG-CLOSE grant to replace approximately 5,900 linear feet of failing water main. The roadway pavement in these areas was also in poor condition. Ruekert & Mielke, Inc. (R/M) was selected to provide professional engineering services including topographic survey; design of water main and appurtenances; roadway evaluation, alternatives development, and design. In a subsequent contract, R/M provided construction phase services including construction observation and administration. Our ability to think outside the box, listen to the client, adapt to changing conditions, and be responsive resulted in a successful project. Cost-related statistics include the following:

- Estimated Construction Cost: \$2,611,382.75
- Actual Construction Bid Price: \$2,687,112.80

Core team members were Andy Burt, Brian Toczyski, and Justin Klieve.

City of Fort Atkinson, WI – 2023 Water Main Relay and Roadway Rehabilitation

R/M continued to work closely with the City of Fort Atkinson on this project to replace approximately 4,540 linear feet of failing water main and rehabilitate the poor roadway pavement. Our team provided professional engineering services including a topographic survey; design of water main and appurtenances; and roadway evaluation, alternatives development, and design. In a subsequent contract, R/M provided construction administration and periodic construction oversight. Our attention to

detail, ability to pivot quickly with new information, and responsive during construction has resulted in another successful project that will be completed spring 2024. Cost-related statistics include the following:

- Estimated Construction Cost: \$2,811,454.25
- Actual Construction Bid Price: \$2,590,998.00

Core team members were Andy Burt, Brian Toczyski, and Justin Klieve.

City of Fort Atkinson, WI – 2024 Water Main Relay and Roadway Rehabilitation

R/M was fortunate enough to be selected again to assist the City of Fort Atkinson on this challenging project. It not only consisted of replacing over 3,800 linear feet of failing water main but also over 2,500 linear feet of new sanitary sewer. The sanitary sewer project replaced very shallow sewer that resulted in numerous backups into basements. Our team provided professional engineering services including a topographic survey; design of water main and appurtenances; and roadway evaluation, alternatives development, and design. In a subsequent contract, R/M provided construction administration and periodic construction oversight. Prior to this project our team conducted a study to validate the feasibility of rerouting the sanitary sewer to eliminate the backups. Cost-related statistics include the following:

- Estimated Construction Cost (Base Bid): \$2,129,044.50
- Actual Construction Bid Price (Base Bid): \$2,126,857.50

Core team members were Andy Burt, Brian Toczyski, and Justin Klieve.

FIRM	SCOPE / APPROACH	PM / TEAM EXPERIENCE	PROJECT EXAMPLES	ADHERANCE TO FORMAT	COST PROPOSAL	TOTAL VALUE
RUEBERT MEIYKE	1. Tasks clearly defined: Yes, each step clearly laid out	3	PROS: Good specific experience	3	386 h. \$61,644 AVG - \$159/h * \$4100 in geotech included	5
	2. Schedule clearly defined: Clear and as requested in RFP.	3				
	3. Overall Scope Quality : As requested	3				24
GRAEF	1. Tasks clearly defined: Yes, each step clearly laid out	3	PROS: Good specific experience	3	568 h. \$76,982 AVG -135/h. * * Geotech included in total fee.	4
	2. Schedule clearly defined: Clear and as requested in RFP.	3				
	3. Overall Scope Quality : As requested	3				21
MSA	1. Tasks clearly defined: Yes, each step clearly laid out	3	PROS: Specific experience	3	658 h. \$98,189 AVG - \$149/h. * 7547.00 Geotech included	3
	2. Schedule clearly defined: Clear and as requested in RFP.	3				
	3. Overall Scope Quality : As requested	3				21
Verbieter	1. Tasks clearly defined: Yes, each step clearly laid out	3	PROS: Good specific experience	3	399 h. \$64,600. AVG - \$161/h **NO geotech included	3
	2. Schedule clearly defined: Clear and as requested in RFP.	3				
	3. Overall Scope Quality : As requested	3				
Blank	1. Tasks clearly defined: Yes, each step clearly laid out					
	2. Schedule clearly defined: Clear and as requested in RFP.					
	3. Overall Scope Quality : As requested					
Blank	1. Tasks clearly defined: Yes, each step clearly laid out					
	2. Schedule clearly defined: Clear and as requested in RFP.					
	3. Overall Scope Quality : As requested					
Blank	1. Tasks clearly defined: Generally, missed geotech reqm't					
	2. Schedule clearly defined: Clear and as requested in RFP.					
	3. Overall Scope Quality : As requested					

1 Fails to meet expectations
3 Meets expectations



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Bruce Peterson, Fire Chief

RE: Review and possible action relating to the purchase and replacement of 10 tires for Fort Atkinson Fire Department Tender 8191 (Peterson, Fire Chief)

BACKGROUND

This request is for approval to replace ten tires on Unit 8191, the 2002 Sterling tandem axle tender used for rural water supply operations in non-hydranted areas. All current tires are approaching the ten-year replacement threshold that will make the unit noncompliant for the DOT certification in early 2026. Both DOT and NFPA standards treat ten years as the maximum service life for emergency vehicle tires.

DISCUSSION

DOT considers tire age a critical safety factor for commercial vehicles. NFPA 1911 reinforces this by requiring that any tire be removed from service once it reaches ten years from its date of manufacture. Replacing the tires now ensures the tender passes its early 2026 DOT certification and prevents the unit from being taken out of service. This timing also helps avoid potential supply delays often associated with heavy apparatus tires.

FINANCIAL ANALYSIS

The quote from J and L Tire for the purchase and installation of ten tires is \$7,877.90. All expenses will be paid from the Fire Rural Truck Maintenance account number 00-52-5231-0700, in accordance with the Fire Contract. No general fund allocation is needed.

RECOMMENDATION

Staff recommends approval to purchase and install of ten replacement tires for Tender 8191 from J & L Tire in Johnson Creek at a total cost of \$7,877.90, with funding through the Fire Rural Truck Maintenance account number 00-52-5231-0700.

ATTACHMENTS

1. Estimate_54686



WORK ORDER

Johnson Creek
 PO Box 497
 855 Linmar Lane
 Johnson Creek, WI 53038
 (920) 699-2576
 jandltirejc@jltire.net

Work Order: 54686
 Cust ID: 7575-08373
 PO:
 Date: 12/11/25 1:49 pm
 Salesperson: Sam Thorman



Bill To:	Ship To:	Vehicle Serviced:	
REEL FORT ATKINSON FIRE DEPARTMENT 128 W MILWAUKEE AVE FORT ATKINSON, WI 53538 Bus: (920) 563-7795	REEL FORT ATKINSON FIRE DEPARTMENT 128 W MILWAUKEE AVE FORT ATKINSON, WI 53538 Contact (920) 563-7768	Eng:	Color:
		VIN:	Mileage In: 0
		License:	Mileage Out: 0
		State:	Unit:

Vehicle Specifications:

Lug Nut Torque Ft/Lbs: Oil Capacity:
 Tire Inflation: Rec. Viscosity:

Customer Requests/Order Comments:

QUOTE ONLY!!

Vehicle Comments:

S1	T1	T2	ITEM	QTY	DESCRIPTION	PRICE	FET	EXT PRICE
			<u>DEFAULT</u>		<u>Misc Service</u>			
ST				2	385/65R22.5~GOO~Armor Max MSA~J/18 BW 158K TL DOT #(s):	\$928.32		\$1,856.64
ST				2	MT/DSMT 2 NEW FRONT TIRES	\$75.00		\$150.00
ST				2	BALANCE	\$32.00		\$64.00
ST				2	MICRO-SIPE	\$35.00		\$70.00
ST				2	VALVE STEM - STEEL	\$7.95		\$15.90
ST				8	11R22.5~GOO~Endurance MSD~H/16 BW TL DOT #(s):	\$621.47		\$4,971.76
ST				8	MT/DSMT 8 NEW DRIVE TIRES	\$65.00		\$520.00
ST				8	VALVE STEM - STEEL	\$9.95		\$79.60
ST				10	Tire Disposal - Medium Truck	\$15.00		\$150.00
ST				1	Please Note: GOVT PRICING VALID THROUGH 12-31-25!	\$0.00		\$0.00

Goodyear Edit Requirements

Customer Name: LOCAL GOVERNMENT
 Customer Code: 09960 Document Type: B - Government Local Sale
 Non Sig: Vehicle Type: Truck

Order Requirements:

Requirement	Value	Status
P.O. NUMBER	FORT FD	Valid
GS/AN # 1	G0009156	Valid



JOHNSON CREEK & WATERTOWN

WORK ORDER

Johnson Creek
 PO Box 497
 855 Linmar Lane
 Johnson Creek, WI 53038
 (920) 699-2576
 jandltirejc@jltire.net

2 of 2

Work Order: 54686

Cust ID: 7575-08373
 PO:
 Date: 12/11/25 1:49 pm
 Salesperson: Sam Thorman



Bill To:	Ship To:	Vehicle Serviced:	
REEL FORT ATKINSON FIRE DEPARTMENT 128 W MILWAUKEE AVE FORT ATKINSON, WI 53538 Bus: (920) 563-7795	REEL FORT ATKINSON FIRE DEPARTMENT 128 W MILWAUKEE AVE FORT ATKINSON, WI 53538 Contact (920) 563-7768	Eng: VIN: License: State:	Color: Mileage In: 0 Mileage Out: 0 Unit:

Vehicle Specifications:

Lug Nut Torque Ft/Lbs: Oil Capacity:
 Tire Inflation: Rec. Viscosity:

Customer Requests/Order Comments:

QUOTE ONLY!!

Vehicle Comments:

MOTOR VEHICLE REPAIR PRACTICES ARE REGULATED BY CHAPTER ATCP. 132. WIS. ADM CODE. ADMINISTERED BY THE BUREAU OF CONSUMER PROTECTION. WISCONSIN DEPT. OF AGRICULTURE. TRADE AND CONSUMER PROTECTION. P.O. BOX 8911 MADISON, WISCONSIN 53708-8911. TECHNICIAN(S) / SUBCONTRACTOR(S)

THIS IS A WORK ORDER

Shop Fee	CC Fee	Discount	Subtotal	Sales Tax	Order Total
\$0.00		\$0.00	\$7,877.90	\$0.00	\$7,877.90

Does your vehicle have locking lug nuts? Yes No

Signature: _____ Date: _____



MEMORANDUM

DATE: December 16, 2025

TO: Fort Atkinson City Council

FROM: Bruce Peterson, Fire Chief

RE: Review and possible action relating to the purchase of a Fire Department battalion vehicle, 2026 Ford F-350 Crew Cab with equipment and modifications at a cost not to exceed \$125,511.91. (Peterson, Fire Chief)

BACKGROUND

This request is for approval to purchase a 2026 Ford F-350 Crew Cab pickup truck and associated equipment and modifications to serve as a dedicated Command Vehicle for the Fire Department on-duty shift commander. The Department does not currently have a vehicle intended for this purpose. Shift commanders respond in staff cars or frontline apparatus, which is inefficient, limits operational flexibility, and places unnecessary mileage on engines and squads.

A dedicated vehicle, commonly referred to in the fire service as a Battalion or Command Unit, is widely used to allow the incident commander to respond quickly, establish a command post, and manage emergency incidents with the necessary tools and communications capability. These vehicles carry the radios, command boards, lighting, and equipment needed to coordinate complex operations. They also extend the service life of more expensive apparatus by reducing the need for shift commanders to respond in heavy fire engines or rescue units.

This purchase is part of the 2026 Capital Improvement Plan, using borrowed funds. The request is being made now due to an anticipated statewide price increase on January 1, 2026.

DISCUSSION

A dedicated Command Vehicle provides the shift commander with a mobile command post for all incident types, but it is especially critical for complex, multi-agency events. Early establishment of a stable command post improves communication, enhances accountability, and supports better coordination with police, EMS, public works, and mutual aid fire departments.

At present, the shift commander often manages fires from the cab of the first-arriving engine. This approach is considered outdated, unsafe, and inconsistent with modern best practices. NFPA 1561 on Emergency Services Incident Management states that the incident commander

shall establish a fixed, visible, and adequately equipped command post to maintain situational awareness and reduce distractions. Managing a fire from inside an engine cab exposes the commander to noise, radio overload, limited visibility, and restricted workspace, all of which impact decision-making and communication. A dedicated Command Vehicle resolves these limitations and is the reason they are common in all fire departments in Wisconsin. This vehicle will also be able to tow the Department's boat and other trailered equipment.

FINANCIAL ANALYSIS

The 2026 Ford F-350 Crew Cab from Griffin Ford in Fort Atkinson is available through the State of Wisconsin bid program. The quoted price of \$55,588.50 is below retail pricing of approximately \$64,195.

Outfitting the vehicle is essential to support its command functions. Quotes for equipment and modifications include:

- Madison Ziebart – Bed cover with rear hatch and side storage: \$4,758
 - Jesus Artz Productions – Vehicle striping and graphics: \$3,135
 - Gencom– Radios and installation, authorized dealer for our radio system: \$23,142.08
 - 10-33 Vehicle Services – Emergency lighting, wiring, and command console: \$38,888.33
- These vendors are established and commonly used by the City's police and fire departments, as well as by most public safety agencies in Jefferson County.

The combined cost for the vehicle and all outfitting is \$125,511.91. Funding for this purchase is included in the 2026 CIP through the approved 2026 borrowing. The estimated cost included in the budget is \$128,000.

RECOMMENDATION

Staff recommends approval to purchase the 2026 Ford F-350 Crew Cab from Griffin Ford and to contract with Madison Ziebart, Jesus Artz Productions, Gencom Radio, and 10-33 Vehicle Services for the necessary equipment and modifications at a total estimated cost of \$125,511.91 for the Fire Department Battalion Vehicle.

ATTACHMENTS

1. Griffin Ford Quote - F350
2. Madison Ziebart - Truck Cab
3. Jesus Artz - Wrapping
4. Gencom - Radios
5. 10-33 - Lighting & Wiring



Date: 06/27/2025 11:41 AM
 Salesperson: Dennis Mitchell
 Manager: John Chady

FOR INTERNAL USE ONLY

BUSINESS NAME FIRE DEPARTMENT Home Phone: _____
CONTACT CITY OF FORT FIRE DEPT.
124 W MILWAUKEE AVE
 Address: FORT ATKINSON, WI 53538 Work Phone: _____
JEFFERSON
 E-Mail: _____ Cell Phone: _____

VEHICLE
 Stock #: _____ New / Used : **New** VIN : _____ Mileage : **0**
 Vehicle : **0** Color : _____
 Type : _____

TRADE IN
 Payoff : _____ VIN : _____ Mileage : _____
 Vehicle : _____ Color : _____
 Type : _____

Selling Price	64,195.00
Discount	9,175.00
Adjusted Price	55,020.00
Total Purchase	55,020.00
Trade Allowance	
Trade Difference	
Service Fee	399.00
Non Tax Fees	169.50
Trade Payoff	
Cash Deposit	
Balance	55,588.50

Customer Approval: _____ Management Approval: _____
 By signing this authorization form, you certify that the above personal information is correct and accurate, and authorize the release of credit and employment information. By signing above, I provide to the dealership and its affiliates consent to communicate with me about my vehicle or any future vehicles using electronic, verbal and written communications including but not limited to eMail, text messaging, SMS, phone calls and direct mail. Terms and Conditions subject to credit approval. For Information Only. This is not an offer or contract for sale.



Preview Order J888 - W3B 4x4 Crew Cab SRW: Order Summary Time of Preview: 06/27/2025 11:33:06 Receipt: NA

Dealership Name: Griffin Ford Fort Atkinson, Inc.

Sales Code : F41379

Dealer Rep.	John Chady	Type	Fleet	Vehicle Line	Superduty	Order Code	J888
Customer Name	Fort atkinson	Priority Code	G5	Model Year	2026	Price Level	620

DESCRIPTION	MSRP	DESCRIPTION	MSRP
F350 4X4 CREW CAB PICKUP/160	\$54000	11499# GVWR PACKAGE	\$0
160 INCH WHEELBASE	\$0	50 STATE EMISSIONS	\$0
TOTAL BASE VEHICLE	\$54000	SNOW PLOW PREP PACKAGE	\$250
AGATE BLACK	\$0	SIRIUSXM W/360L (3 MOS TRIAL)	\$0
MEDIUM DARK SLATE	\$0	JACK	\$0
PREFERRED EQUIPMENT PKG.610A	\$0	UPFITTER SWITCHES	\$230
.XL TRIM	\$0	410 AMP DUAL ALTERNATOR	\$115
.AIR CONDITIONING -- CFC FREE	\$0	EXTERIOR BACKUP ALARM	\$230
.AM/FM STEREO MP3/CLK	\$0	PRICE CONCESSION INDICATOR	\$0
7.3L DEVCT NA PFI V8 ENGINE	\$1500	REMARKS TRAILER	\$0
10-SPEED AUTO TORQSHIFT	\$0	TOUGH BED SPRAY IN BEDLINER	\$625
3.73 ELECTRONIC-LOCKING AXLE	\$0	DUAL BATTERY	\$210
JOB #1 ORDER	\$0	CONN PKG: 1 YR INCL W/FORD APP	\$0
FORD FLEET SPECIAL ADJUSTMENT	\$0	XL DRIVER ASSIST PACKAGE	\$730
STX APPEARANCE PACKAGE	\$3115	SPECIAL DEALER ACCOUNT ADJUSTM	\$0
.LT275/70R18E BSW ALL TERRAIN	\$0	SPECIAL FLEET ACCOUNT CREDIT	\$0
.EBONY BLACK ALUM WHLS-18"	\$0	FUEL CHARGE	\$0
.CLOTH 40/20/40 SEAT	\$0	NET INVOICE FLEET OPTION (B4A)	\$0
FX4 OFF-ROAD PACKAGE	\$550	PRICED DORA	\$0
.SKID PLATES	\$0	ADVERTISING ASSESSMENT	\$0
PLATFORM RUNNING BOARDS	\$445	DESTINATION & DELIVERY	\$2195
TOTAL BASE AND OPTIONS			MSRP \$64195
DISCOUNTS			NA
TOTAL			\$64195

ORDERING FIN: Q1278 END USER FIN: Q1278

INCENTIVES

Acc. Code ID :10 Contract/Ref # :06-402T Bid Date :05/08/25State : WI

DISCOUNTS:

\$-2700.00

Madison Ziebart - P&B Truck Accessories

Estimate

2124 S. Stoughton Rd
 Madison, WI 53716
 608-222-4499

Date	Estimate #
11/11/2025	30757

Name / Address
Fort Atkinson Fire Dept. 124 W Milwaukee Ave Fort Atkinson WI 53538 920-397-9908 Robbie Allard rallard@fortatkinsonwi.gov

Vehicle Information
2026 Ford SuperDuty S.Crew 6.75" bed Paint Code: (black) Email request

P.O. No.	Rep
	Ryan

Item	Description	Qty	Rate	Total
ARE Order}	**PRICING VALID FOR PURCHASES MADE AFTER DECEMBER 1, 2025** RealTruck / ARE .035" Aluminum 26" DCU Topper --Std Black Exterior with Black Trim --Std Full-Length Side Doors with Folding T-handles --Std Solid Front (no window) --Std Interior (no skin / carpet) --No Interior Lighting --No E-Lock Keyless Entry System --No Roof Rack / Tracks		3,061.00	3,061.00T
ARE Order}	Hatchback Rear Access Door (replaces OEM tailgate)		359.00	359.00T
ARE Order}	Side-Access Toolbox w/o divider (per side) (90lbs capacity per toolbox)	2	222.00	444.00T
ARE Order}	Ford - Digital Camera Housing only with Harness (uses OEM tailgate camera for compatibility with 360 / non-360 systems. Uses truck's OEM monitor)		244.00	244.00T
Installation1	REMOVE TAILGATE AND CAMERA FROM TAILGATE	1.5	160.00	240.00T
Install Kit	Topper Installation Package - BOLT-ON Includes 4x Bolt-on HW / Tape Kit / CHMSL Harness & Disconnect Plug **DRILLING OF TRUCK BED CAPS REQUIRED**		225.00	225.00T
ship-ARE	Topper / Lid Transfer Fee On Products		125.00	125.00T
Trailseal	Hatchback Access Door Tailgate Seal Kit		60.00	60.00T

Subtotal	\$4,758.00
Sales Tax (0.0%)	\$0.00
Total	\$4,758.00

Estimate Valid 1 Day Only
1/2 Deposit Required to order parts and hold appointments



Jesus Artz & Productionz, LLC
 550 Enterprise Dr
 Lake Mills, WI 53551
 +19206756352
 jesuxibit@gmail.com

Estimate

ADDRESS

Robert Allard
 Fort Atkinson Fire Department
 128 Milwaukee Ave W
 Fort Atkinson, WI 53538
 United States

SHIP TO

Robert Allard
 Fort Atkinson Fire Department
 128 Milwaukee Ave W
 Fort Atkinson, WI 53538
 United States

ESTIMATE #	DATE
3873	07/23/2025

P.O. NUMBER

8181_KIT_REFLECTIVE

QTY	ITEM NO.	DESCRIPTION	RATE	AMOUNT
2	ORA5650RA (MVD)	5 Mil Reflective Vinyl Decal - 17" x 17" - Maltese Cross (Front Doors Driver and Passenger Side)	135.00	270.00T
2	ORA5650RA (MVD)	5 Mil Reflective Vinyl Decal - 25" x 11" - BATTALION 81 (Second Door Driver and Passenger Side)	135.00	270.00T
2	ORA5650RA (MVD)	5 Mil Reflective Vinyl Decal - 9" x 3" - 8181 (Upper Front Fender Driver and Passenger Side)	35.00	70.00T
2	ORA5650RA (MVD)	5 Mil Reflective Vinyl Decal - 64" x 9" - FORT ATKINSON (Topper Upper Driver and Passenger Side)	155.00	310.00T
2	Sales	5 Mil Reflective Vinyl Decal - 13" x 5" - FIRE (Topper Below Jefferson Left Driver and Passenger Side)	35.00	70.00T
2	ORA5650RA (MVD)	5 Mil Reflective Vinyl Decal - 16" x 5" - DEPT. (Topper Below Jefferson Right Driver and Passenger Side)	30.00	60.00T
2	3M680CR	7 Mil Red Reflective Decal - 181" x 6" - Stripe Step-Up Z (Sides of Truck)	430.00	860.00T
1	ORA5650RA (MVD)	5 Mil Reflective Vinyl Wrap - 75" x 50" - Chevron w/ BATTALION 81, Maltese Cross, FORT ATKINSON FIRE DEPT. (Tailgate)	1,000.00	1,000.00T
1	DT100	Design Time/Layout/Email Proofs for Client Approval - 2026 F-350 Kit 8181	75.00	75.00T
1	Prep-Install	Hand Wash/Wipe Down F350 Truck w/ Isopropyl Alcohol w/ Lint Free Cloth	65.00	65.00T
1	Prep-Wrap	Prep Vehicle for Wrap/Dismantle Fixtures/Unclipping Trim for Tailgate (Unit Rate)	85.00	85.00T

SUBTOTAL 3,135.00
 TAX 0.00
 TOTAL **\$3,135.00**

Accepted By

Accepted Date

Prices may change due to availability of product(s) and what is in stock.
 To secure product(s) it is recommended to apply half payment to lock in the price and a production date.

Thank you for the time! Enjoy this day!







Robert Allard

From: Jesus Artz & Productionz, LLC <quickbooks@notification.intuit.com>
Sent: Sunday, July 27, 2025 11:57 AM
To: Robert Allard; James Chase
Cc: jesusxibit@gmail.com
Subject: Estimate 3873 from Jesus Artz & Productionz, LLC
Attachments: FAFD_F350 Tailgate_Proof.png; FAFD_F350 Passenger Side_Proof.png; FAFD_F350_Driver Side_Proof.png; Estimate_3873_from_Jesus_Artz_Productionz_LLC.pdf

ESTIMATE 3873



Jesus Artz & Productionz, LLC

\$3,135.00

Review and approve

Powered by QuickBooks

To: Fort Atkinson Fire Department

Please review the estimate below.
Feel free to contact us if you have any questions or changes.
We look forward to working with you.

Hello Robert & James,

So, here is the B81 Kit printed all on Reflective Vinyl....

This kit is the most visible and the BEST of it's class.

Please go over it and let me know about any updates we are to do upon its arrival date.

Working w/ Fort Fire Dept., Josè



Madison - (608)271-4848
 Milwaukee - (262)439-2000
 Eau Claire - (715)225-7604
 WI Rapids - (715)424-3050
 McHenry - (815)385-4224

2880 Commerce Park Drive
 Madison, WI 53719

800-356-3200 | www.gencomm.com

SALES QUOTE

Sales Quote No: 37819
 Date: 7/28/25
 Account No: 1845

Bill To: Fort Atkinson Fire Department
 124 West Milwaukee Avenue
 Fort Atkinson, WI 53538
 USA

Ship To: Fort Atkinson Fire Department
 Attn: Mike Lawwson
 124 West Milwaukee Avenue
 Fort Atkinson, WI 53538
 USA

Sales Person	P.O. Number	Ship Method	Payment Terms	Quote Expires On
Ron Sampson	Pending	Installation	NET 30 Days	8/11/25

Notes

Mike Lawson 920-397-9908 #7011

Installation has not been added to the quote

BAT only

Item No	Description	Quantity	UM	Price	Amount
VM7730HBF-P	Kenwood Viking VHF Hi Power Deck for Multi-Deck, Single Head Use	3.00	Each	\$6,010.32	\$18,030.96
KCH-20RV	KCH-20 Single Remote Head	6.00	Each	\$0.00	\$0.00
KCT-71M2	^Kenwood Remote Control Cable (17 feet)	3.00	Each	\$0.00	\$0.00
KCT-71M3	^Kenwood Remote Control Cable (25 Feet)	3.00	Each	\$0.00	\$0.00
KMC-65M	^Kenwood Mobile Mic 8-Pin Plug	6.00	Each	\$0.00	\$0.00
KCT-23M4	^Kenwood DC Cable (75/110W Remote mount)	3.00	Each	\$0.00	\$0.00
KMB-36	^Kenwood/EFJ High Power Mounting Bracket VM7730	3.00	Each	\$0.00	\$0.00
597539077901	EF Johnson USB Micro A-B Cable	3.00	Each	\$0.00	\$0.00
KCT-18	^Kenwood Ignition sense cable	3.00	Each	\$0.00	\$0.00
KES-5A	^Kenwood External speaker, 40W max input	3.00	Each	\$0.00	\$0.00
KCT-72M	^Kenwood External Accessory Connection Cable for KCH-19M / KCH-20RM	3.00	Each	\$0.00	\$0.00
8322000002	EF Johnson P25 Conventional Option	3.00	Each	\$0.00	\$0.00
8322000005	EF Johnson P25 Phase 1 Trunking Option	3.00	Each	\$0.00	\$0.00
8326000006	EF Johnson 1024 Channels/Talkgroups	3.00	Each	\$0.00	\$0.00
8323000003	EF Johnson DES-OFB (Multi-Key)	3.00	Each	\$0.00	\$0.00
8323000005	EF Johnson ARC4 (ADP Compatible) Viking	3.00	Each	\$0.00	\$0.00
8326000015	EF Johnson 25KHz Disabled	3.00	Each	\$0.00	\$0.00
8326000034	Customer Transmit Power Levels	3.00	Each	\$0.00	\$0.00
VM7730HBF-P	Kenwood Viking VHF Hi Power Deck for Multi-Deck, Single Head Use	1.00	Each	\$5,111.12	\$5,111.12
KCH-20RV	KCH-20 Single Remote Head	1.00	Each	\$0.00	\$0.00
KCT-71M2	^Kenwood Remote Control Cable (17 feet)	1.00	Each	\$0.00	\$0.00
KMC-65M	^Kenwood Mobile Mic 8-Pin Plug	1.00	Each	\$0.00	\$0.00
KCT-23M4	^Kenwood DC Cable (75/110W Remote mount)	1.00	Each	\$0.00	\$0.00
KMB-36	^Kenwood/EFJ High Power Mounting Bracket VM7730	1.00	Each	\$0.00	\$0.00
597539077901	EF Johnson USB Micro A-B Cable	1.00	Each	\$0.00	\$0.00
KCT-18	^Kenwood Ignition sense cable	1.00	Each	\$0.00	\$0.00
KES-5A	^Kenwood External speaker, 40W max input	1.00	Each	\$0.00	\$0.00



Madison - (608)271-4848
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2880 Commerce Park Drive
 Madison, WI 53719

800-356-3200 | www.gencomm.com

SALES QUOTE

Sales Quote No: 37819
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 Account No: 1845

Bill To: Fort Atkinson Fire Department
 124 West Milwaukee Avenue
 Fort Atkinson, WI 53538
 USA

Ship To: Fort Atkinson Fire Department
 Attn: Mike Lawwson
 124 West Milwaukee Avenue
 Fort Atkinson, WI 53538
 USA

KCT-72M	^Kenwood External Accessory Connection Cable for KCH-19M / KCH-20RM	1.00	Each	\$0.00	\$0.00
8322000002	EF Johnson P25 Conventional Option	1.00	Each	\$0.00	\$0.00
8322000005	EF Johnson P25 Phase 1 Trunking Option	1.00	Each	\$0.00	\$0.00
8326000006	EF Johnson 1024 Channels/Talkgroups	1.00	Each	\$0.00	\$0.00
8323000003	EF Johnson DES-OFB (Multi-Key)	1.00	Each	\$0.00	\$0.00
8323000005	EF Johnson ARC4 (ADP Compatible) Viking	1.00	Each	\$0.00	\$0.00
8326000015	EF Johnson 25KHz Disabled	1.00	Each	\$0.00	\$0.00
8326000034	Customer Transmit Power Levels	1.00	Each	\$0.00	\$0.00

Returns & exchanges are accepted within 30 days of purchase and require an RMA number. Items must be in unused condition and in original packaging. Special order items are non-returnable and may not be cancelled once shipped from vendor/manufacture. Radio and infrastructure equipment/manufacturers carry a 25% restocking fee.

Subtotal	\$23,142.08
Freight	\$0.00
Sales Tax	\$0.00
Sales Order Total	\$23,142.08

* A 3% surcharge applies to all credit card payments.

Unless otherwise specified, shipping and handling charges are not included and will be added to the associated invoice.

Quote Accepted By _____ Date _____



10-33 Vehicle Services, LLC
 N4615 Indian Point Rd.
 Sullivan, WI 53178
 Phone: (262) 490-3109
 Email: Bflood@1033VS.com

Estimate

Date	Estimate #
7/22/2025	2851

Customer:
 Fort Atkinson Fire Dept.

Revised Quote 7-22-25

Item	Description	Qty	Rate	Total
LABOR	SET UP F150 FOR FIRE DEPARTMENT USE	60.00	130.50	7,830.00
BJ2LLLL	WHELEN LIBERTY II WECAN X 54" DUO LIGHTBAR R/G CORNERS, R/W FRT & SIDE R/A REAR	1.00	2,802.80	2,802.80
CLBV2V	WHELEN VEHICLE TO VEHICLE SYNC, LIGHTBAR MOUNTED	1.00	193.28	193.28
MKAJ94	WHELEN ADJUSTABLE LEVEL FOOT, 2017-2019 F SERIES	1.00	0.00	0.00
C399	WHELEN CENCOM CORE AMPLIFIER CONTROL MODULE	1.00	1,085.60	1,085.60
CCTL6	WHELEN CENCOM CORE ROTARY KNOB CONTROL HEAD	1.00	0.00	0.00
C399SP	WHELEN SCANPORT, FITS C399	1.00	0.00	0.00
SA315P	WHELEN COMPOSITE SIREN SPEAKER	1.00	0.00	0.00
SAK9	WHELEN UNIVERSAL SWIVEL SPEAKER BRACKET	1.00	0.00	0.00
TCRWX6	WHELEN TRACER, 6 POD DUO (RUNNING BOARD)	2.00	910.80	1,821.60
TCRWXP	WHELEN TRACER PRIMARY POD, DUO RED/WHITE	2.00	0.00	0.00
TCRWXSD	WHELEN TRACER POD, DUO RED/WHITE	10.00	0.00	0.00
TCRB47	WHELEN TRACER BRACKETS, 2017 F-150	2.00	0.00	0.00
CCTL5	WHELEN CENCOM CORE HANDHELD CONTROL HEAD (REAR BED MOUNTED)	1.00	278.24	278.24
CAT6	CAT 6 CABLE	1.00	15.95	15.95
CAT6 COUPLER	CAT 6 COUPLER	1.00	5.99	5.99
CAT6 SPLIT	CAT6 2 WAY SPLITTER	1.00	15.68	15.68
CEM16	WHELEN WECAN X EXPANSION MODULE, 16 OUTPUT 4 INPUT	2.00	171.765	343.53
CEM4HC	WHELEN CORE HIGH CURRENT MODULE	2.00	273.53	547.06
ARGES1	WHELEN ARGES SPOT LIGHT	1.00	463.54	463.54
ARGCH1	WHELEN ARGES CONTROL HEAD, BAIL MOUNT	1.00	207.06	207.06
ARG47DD	WHELEN ARGES MOUNT, 2023 F450/F550/F600 DR FENDER	1.00	68.24	68.24
TCRWX3	WHELEN WECAN X TRACER, 3 POD (REAR FACING INSIDE CAP)	1.00	464.71	464.71
TCRWXP	WHELEN TRACER PRIMARY POD, RED/AMBER	1.00	34.70	34.70

Thank you for allowing us to bid on your vehicle and equipment needs. This estimate is valid for 7 days. Special ordered equipment will be invoiced upon order placement.

Subtotal

Sales Tax (0.0%)

Total



10-33 Vehicle Services, LLC
 N4615 Indian Point Rd.
 Sullivan, WI 53178
 Phone: (262) 490-3109
 Email: Bflood@1033VS.com

Estimate

Date	Estimate #
7/22/2025	2851

Customer:
 Fort Atkinson Fire Dept.

Revised Quote 7-22-25

Item	Description	Qty	Rate	Total
LABOR	SET UP F150 FOR FIRE DEPARTMENT USE	60.00	130.50	7,830.00
BJ2LLLL	WHELEN LIBERTY II WECAN X 54" DUO LIGHTBAR R/G CORNERS, R/W FRT & SIDE R/A REAR	1.00	2,802.80	2,802.80
CLBV2V	WHELEN VEHICLE TO VEHICLE SYNC, LIGHTBAR MOUNTED	1.00	193.28	193.28
MKAJ94	WHELEN ADJUSTABLE LEVEL FOOT, 2017-2019 F SERIES	1.00	0.00	0.00
C399	WHELEN CENCOM CORE AMPLIFIER CONTROL MODULE	1.00	1,085.60	1,085.60
CCTL6	WHELEN CENCOM CORE ROTARY KNOB CONTROL HEAD	1.00	0.00	0.00
C399SP	WHELEN SCANPORT, FITS C399	1.00	0.00	0.00
SA315P	WHELEN COMPOSITE SIREN SPEAKER	1.00	0.00	0.00
SAK9	WHELEN UNIVERSAL SWIVEL SPEAKER BRACKET	1.00	0.00	0.00
TCRWX6	WHELEN TRACER, 6 POD DUO (RUNNING BOARD)	2.00	910.80	1,821.60
TCRWXPD	WHELEN TRACER PRIMARY POD, DUO RED/WHITE	2.00	0.00	0.00
TCRWXSD	WHELEN TRACER POD, DUO RED/WHITE	10.00	0.00	0.00
TCRB47	WHELEN TRACER BRACKETS, 2017 F-150	2.00	0.00	0.00
CCTL5	WHELEN CENCOM CORE HANDHELD CONTROL HEAD (REAR BED MOUNTED)	1.00	278.24	278.24
CAT6	CAT 6 CABLE	1.00	15.95	15.95
CAT6 COUPLER	CAT 6 COUPLER	1.00	5.99	5.99
CAT6 SPLIT	CAT6 2 WAY SPLITTER	1.00	15.68	15.68
CEM16	WHELEN WECAN X EXPANSION MODULE, 16 OUTPUT 4 INPUT	2.00	171.765	343.53
CEM4HC	WHELEN CORE HIGH CURRENT MODULE	2.00	273.53	547.06
ARGES1	WHELEN ARGES SPOT LIGHT	1.00	463.54	463.54
ARGCH1	WHELEN ARGES CONTROL HEAD, BAIL MOUNT	1.00	207.06	207.06
ARG47DD	WHELEN ARGES MOUNT, 2023 F450/F550/F600 DR FENDER	1.00	68.24	68.24
TCRWX3	WHELEN WECAN X TRACER, 3 POD (REAR FACING INSIDE CAP)	1.00	464.71	464.71
TCRWXPK	WHELEN TRACER PRIMARY POD, RED/AMBER	1.00	34.70	34.70

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	Sales Tax (0.0%)
	Total



10-33 Vehicle Services, LLC
 N4615 Indian Point Rd.
 Sullivan, WI 53178
 Phone: (262) 490-3109
 Email: Bflood@1033VS.com

Estimate

Date	Estimate #
7/22/2025	2851

Customer:
 Fort Atkinson Fire Dept.

Item	Description	Qty	Rate	Total
TCRWXSK	WHELEN TRACER POD, RED/AMBER	1.00	34.70	34.70
TCRLBKT	WHELEN TRACER "L" BRACKET	3.00	9.41667	28.25
FAB	CUSTOM FABRICATION OR LIGHT BRACKET	1.00	65.00	65.00
M2RC	WHELEN M2 LED LIGHTHEAD, RED (REAR FACING CAP)	4.00	129.4125	517.65
M2FB	WHELEN M2 FLANGE, BLACK	4.00	9.4175	37.67
WX2250	WHELEN 2250SERIES 50" LIGHT BAR (DOUG'S DRAWING)	1.00	1,062.95	1,062.95
22AEC	WHELEN 2250 SERIES ONE ANGLED END CAP	2.00	0.00	0.00
22LL	WHELEN 2250 SERIES One DUO™ Color Lighthouse, RED/GREEN	2.00	0.00	0.00
22LK	WHELEN 2250 SERIES One DUO™ Color Lighthouse, Red/Amber	6.00	0.16667	1.00
22LOAD	WHELEN 2250 SERIES Load Light	2.00	0.00	0.00
I2D	WHELEN ION DUO RED/WHITE (GRILLE)	4.00	121.1825	484.73
60CREGCS	WHELEN 6" ROUND LED INTERIOR LIGHT RED/WHITE (CAB INTERIOR)	2.00	151.77	303.54
PSD02FCR	WHELEN STRIP LIGHT PLUS DUO RED/WHITE (CAP LIGHTING)	6.00	128.23833	769.43
PSBKT45	WHELEN STRIP LIGHT PLUS 45 DEG BRACKET	6.00	18.82167	112.93
S30MRB	WHELEN 30" PIONEER SUMMIT W/ RED FLASHING	2.00	988.835	1,977.67
SUBKT4B	WHELEN SUMMIT FLAT MOUNT, BLACK	4.00	0.00	0.00
SUCBL15	WHELEN 15' CABLE	4.00	69.415	277.66
SHIP	SHIPPING (Estimate only)	7.00	8.00	56.00
C-VSW-2400-F150...	HAVIS 12.5" Wide Flat 24" Vehicle-Specific Console For 2021-2023 Ford F-150 Police Responder, Special Service Vehicle (SSV), 2023 Ford F-250, 350, 450 XL & XLT Super Duty Pickup, F-450 & 550 Cab Chassis & F-600 Chassis Cab	1.00	634.11	634.11
C-APW-1390	HAVIS 13" ACCESSORY POCKET	1.00	60.03	60.03
CUP2-1001	HAVIS SELF-ADJUSTING DUAL CUP HOLDER	1.00	48.30	48.30
C-HDM-204	HAVIS POLE MOUNT	1.00	163.53	163.53
C-MD-112	HAVIS 11" LOCKING SWING ARM	1.00	259.55	259.55

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7/22/2025	2851

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Item	Description	Qty	Rate	Total
PKG-TAB4-APP3	HAVIS Package – DS-TAB-401 Docking Station, TC-404 Tablet Case, and LPS-184 DC Power Supply for Apple iPad Pro 12.9? (4th – 6th Gen) and iPad Air 13? (M2, M3)	1.00	676.20	676.20
C-SBX-104	HAVIS UNDER SEAT STORAGE BOX, F SERIES	1.00	613.41	613.41
73557	BLUE SEA DUAL USB	2.00	47.49	94.98
SHIP	SHIPPING (ESTIMATE ONLY)	1.00	550.00	550.00
091-266-12-40-RC...	KUSSMAUL CHIEF'S SMART CHARGER W/ REMOTE DISPLAY	1.00	1,199.04	1,199.04
091-55-20-120-BLK	KUSSMAUL SUPER AUTO EJECT W/ BLACK COVER	1.00	373.54	373.54
SHIP	SHIPPING (ESTIMATE ONLY)	1.00	100.00	100.00
EBL-1060	EXTENDEBED 60" FRAME, CUSTOM CONFIGURATION INCLUDES ENERGY CHAIN	1.00	2,300.00	2,300.00
SHIP	SHIPPING (Estimate only)	1.00	600.00	600.00
COAX	COAX CABLE	4.00	15.4375	61.75
EMFLX-M10008-...	E/M WAVE WIDE BAND VHF QUARTER-WAVE ANTENNA	2.00	89.00	178.00
800 WHIP	800 MHZ 1/4 WAVE ANTENNA	2.00	21.95	43.90
SUPPLIES	110 VOLT INSTALLATION SUPPLIES 1 OUTLET IN CAB(REAR SEAT), 1 EACH SIDE CABINET	3.00	95.00	285.00
MMSU-1	MAGNETIC MIC SINGLE UNIT	5.00	36.536	182.68
SUPPLIES	INSTALLATION SUPPLIES	1.00	550.00	550.00
HARNES	CUSTOM WIRE HARNES	1.00	1,100.00	1,100.00
70185	8 WAY FUSE PANEL	5.00	17.652	88.26
76610	90 AMP MEGA CIRCUIT BREAKER	1.00	41.99	41.99
78515	MAXI FUSE HOLDER	1.00	12.50	12.50
78502	30A MAXI FUSE	1.00	2.09	2.09
RELAY	RELAY	2.00	13.95	27.90

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Total



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7/22/2025	2851

Customer:
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Item	Description	Qty	Rate	Total
80000DL	POWER STUD, 1/4" RED	1.00	9.26	9.26
80001DL	GROUND STUD, 1/4" BLACK	1.00	9.26	9.26
SHIP	MISC SHIPPING	1.00	20.00	20.00
FC-F15023-B-4760...	ROCKLAND CUSTOM FIRE CABINET PER ATTACHED DRAWING	1.00	6,434.38	6,434.38
C-MD-112	OPTIONAL: HAVIS 11" LOCKING SWING ARM	1.00	261.51	261.51

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Subtotal \$38,888.33

Sales Tax (0.0%) \$0.00

Total \$38,888.33