



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, MARCH 17, 2026 – 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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**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 February 3, 2026, Ordinance Committee** meeting (Ebbert, Clerk/Treasurer/Finance Director)
  - b. Review and possible action relating to the **minutes of the March 3, 2026 City Council meeting** (Ebbert, Clerk/Treasurer/Finance Director)
  - c. Review and possible action relating to the **minutes of the March 9, 2026, License Committee meeting** (Ebbert, Clerk/Treasurer/Finance Director)
  - d. Review and possible action relating to the **minutes of the March 10, 2026, Plan Commission meeting** (Ebbert, Clerk/Treasurer/Finance Director)
  - e. Review and possible action relating to **building, plumbing, and electrical permit report for February 2026** (Draeger, Building Inspector/Zoning Administrator)

- f. Review and possible action relating to the City Clerk-issued **License and Permit Report for March** (Ebbert, Clerk/Treasurer/Finance Director)
- g. Review and possible action relating to **City Sewer, Water, and Stormwater Utility Financial Statements** as of December 31, 2025 (Ebbert, Clerk/Treasurer/Finance Director)
- h. Review and possible action relating to **City Sewer, Water, and Stormwater Utility Financial Statements** as of February 17, 2026 (Ebbert, Clerk/Treasurer/Finance Director)
- i. Review and possible action relating to a **Special Event: FA Summer Charity Concerts on June 10, June 24, July 15, July 29, August 12, and August 26, 2026, from 6:30-8:30 p.m. at Barrie Park** (Ebbert, Clerk/Treasurer/Finance Director)
- j. Review and possible action on a **Special Event: Parks & Recreation Egg Hunt, Saturday, April 4, 2026, 8:00 - 11:00 a.m. at Ralph Park** (Ebbert, Clerk/Treasurer/Finance Director)
- k. Review and possible action on a **Special Event: Park & Recreation Youth Triathlon, Saturday, July 25, 2026, 8:00 - 1:00 a.m.** (Ebbert, Clerk/Treasurer/Finance Director)
- l. Review and Possible action on a **Special Event: Wings & Wheels Fly-In Breakfast**, Sunday, May 31, 2026, 8 a.m.-12 p.m. at the Fort Atkinson Municipal Airport (Ebbert, Clerk/Treasurer/Finance Director)
- m. Review and possible action on a **Special Event: Rhythm on the River**, August 29, 2026 from 5:00 - 9:00 p.m. at the Merchant Ave./N Water Street W./Municipal Lot/Boat Launch (Ebbert, Clerk/Treasurer/Finance Director)
- n. Review and possible action relating to **Cigarette, Tobacco and Electronic Vaping Device Retail License Applications** for Speedy 3 LLC dba Location 2 - 303 S. Main Street for the licensing period of March 18, 2026 through June 30, 2026 (Ebbert, Clerk/Treasurer)
- o. Review and possible action relating to **Alcohol Beverage License Application** for Speedy 3 LLC dba Location 2 - 303 S. Main Street for use at 303 S. Main Street for the licensing period of March 18, 2026 through June 30, 2026 (Ebbert, Clerk/Treasurer)

## 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. Review and possible action on a proclamation recognizing April as **Fair Housing Month** in the City of Fort Atkinson (Houseman, City Manager)

## 8. Resolutions and Ordinances

- a. Review and possible action relating to a **Resolution Terminating Tax Incremental District #6** in the City of Fort Atkinson, Jefferson County, Wisconsin (Houseman, City Manager)
- b. Review and possible action relating to a **Resolution Terminating Tax Incremental District #7** in the City of Fort Atkinson, Jefferson County, Wisconsin (Houseman, City Manager)
- c. First reading of an ordinance relating to a **Zoning Map Amendment** to change the zoning district for the property located on Mehta Lane (parcels 226-0614-3231-000 and 226-0614-3242-001) from Suburban Mixed Use (SMU) to Multi-Family Residential-12 (MRM-12) (Draeger, Director of Neighborhood and Building Services)
- d. First reading of an ordinance relating to a **Zoning Map Amendment for the property located at 23 N. Water St. E.** and the westerly adjacent vacant lot (parcels 226-0514-0322-008 and 226-0514-0322-009), to change the zoning from Downtown Historic Mixed Use (DHMU) to Downtown Historic Mixed Use with a Planned Unit Development Overlay (Draeger, Director of Neighborhood and Building Services)
- e. First reading of an ordinance relating to amendments to various sections of the **Zoning Ordinance, Chapter 15** of the City of Fort Atkinson Code of General Ordinances, relating to the review and approval of Signs (Draeger, Director of Neighborhood and Building Services)

## 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 on a **Planned Unit Development-General Development Plan** for the property located at 23 N. Water St. E. and the westerly adjacent vacant lot (parcels 226-0514-0322-008 and 226-0514-0322-009), to allow removal of a vacant building and development of a 15-stall parking lot at the site (PUD-2025-03) (Draeger, Director of Neighborhood and Building Services)
- b. Review and possible action relating to a **Certified Survey Map** for the property located at 1310 Campus Dr. (Draeger, Director of Neighborhood and Building Services)
- c. Review and possible action relating to a General Consulting Services Agreement

between the City of Fort Atkinson and Robert W. Baird & Co. Incorporated for the **creation of Tax Increment District #11** (Houseman, City Manager)

- d. Review and possible action relating to a General Consulting Services Agreement between the City of Fort Atkinson and Robert W. Baird & Co. Incorporated for the **creation of Tax Increment District #12** (Houseman, City Manager)
- e. Review and possible action relating to a General Consulting Services Agreement between the City of Fort Atkinson and Robert W. Baird & Co. Incorporated for the **creation of Tax Increment District #13** (Houseman, City Manager)
- f. Review and possible action relating to an Agreement for General Consulting Services with Robert W. Baird & Co. Incorporated to amend the **Tax Increment District #9** project plan and boundaries (Houseman, City Manager)
- g. Review and possible action relating to the award of professional services related to the **Lead Service Lateral Replacement Plan** (Navin, Director of Public Works)
- h. Review and possible action related to the **Purchase of a 2026 F-450 Flatbed Truck with Dump Body** (Dayton, Director of Parks and Recreation)
- i. Review and possible action related to the purchase and replacement of **two Air Conditioning Units at the Fort Atkinson Senior Center** (Dayton, Parks and Recreation Director)

## 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: March 13, 2026*

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

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**ORDINANCE COMMITTEE MEETING  
IN PERSON AND VIA ZOOM  
TUESDAY, FEBRUARY 3, 2026 – 6:00 PM  
CITY HALL – SECOND FLOOR**

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**MINUTES**

**1. Call meeting to order**

President Jaeckel called the meeting to order at 6:00 pm.

**2. Roll call**

Present: Cm. Huckabee, Cm. Johnson and President Jaeckel. Also present: City Manager, City Clerk/Treasurer, Director of Public Works, Director of Neighborhood Services and Police Chief.

**3. Public Comment for Matters on the Agenda**

- a. *The Ordinance Committee will receive comments from City residents relating to matters on the agenda. Comments are generally limited to three minutes per individual. Anyone wishing to speak is required to sign up in advance and state the following items for the record when called upon: name and address.*

*Note for hybrid meetings: if anyone on the Zoom wishes to speak during public comment relating to matters on the agenda, please raise your virtual hand through Zoom, as the chat box is not monitored and those on the call must remain muted if not recognized to speak.*

None.

**4. New Business**

- a. *Review and possible recommendation to the City Council relating to amendments to various sections of the Zoning Ordinance, Chapter 15 of the City of Fort Atkinson Code of General Ordinances, relating to the review and approval of Signs (Draeger, Director of Neighborhood and Building Services)*

Director Draeger stated that city staff have prepared the attached summary of proposed Zoning Text Amendments focused on Article IX: Signage. The proposed amendments would shift review and approval of Permanent Business Signs and Optional Miscellaneous Signs from the Plan Commission to administrative staff review, while retaining the existing Plan Commission review and approval process for Electronic Message Signs and signage located within the DHMU zoning district. The proposed changes are based on the

recognition that Plan Commission review of many sign types is an unnecessary additional step. Prior to Plan Commission consideration, staff has already worked with applicants to ensure full compliance with ordinance standards. As a result, Plan Commission review typically does not add new conditions or information once the ordinance requirements are met. This approach is consistent with practices adopted by many Wisconsin communities to streamline sign permitting, reduce approval timelines, and promote a more business-friendly regulatory process while limiting discretionary review. The proposed amendments will result in a more efficient sign approval process, reduced potential for legal challenges, improved administrative efficiency, and continued heightened review for sensitive areas and unique sign types.

Huckabee moved, seconded by Johnson to recommend the City Council approve the proposed Zoning Text Amendments as outlined in the attached summary dated January 27, 2026. Motion carried.

- b. *Review and possible recommendation to the City Council relating to an Ordinance to repeal and recreate Article III of Chapter 86 of the City of Fort Atkinson Code of General Ordinances relating to Recycling (Navin, Director of Public Works)*

Director Navin presented the purpose of this memo is to request the Ordinance Committee's recommendation to repeal and recreate the City's recycling ordinance. This update is necessary to align City code with new Wisconsin Department of Natural Resources (DNR) administrative rules that went into effect on July 1, 2025. The City's existing recycling ordinance was originally adopted in 1994 to comply with state solid waste recovery laws. However, in May 2024, the Governor approved new administrative rules (specifically affecting Chapter NR 544) to update effective recycling program criteria. To be recognized by the DNR as having an "effective recycling program" under §287.11, Wis. Stats., the City is mandated to adopt these updated rules. Maintaining this status is not optional if the City wishes to remain eligible for state recycling grants.

Huckabee moved, seconded by Johnson to recommend the draft ordinance to repeal and recreate Chapter 86, Article III to the City Council. This action ensures that our local laws remain current with state standards and protects our eligibility for essential grant funding. Motion carried.

- c. *Review and possible recommendation to the City Council relating to Sections 94-151 through 95-160 of the City of Fort Atkinson Municipal Code (ATV/UTVs) (Houseman, City Manager)*

Manager Houseman discussed that the Fort Atkinson City Council enacted an ordinance allowing ATV/UTV use on the City's streets in November 2023, which became effective on April 8, 2024. The ordinance included a two-year automatic sunset without additional Council action in Section 95-160. Without action, the ordinance would sunset on April 8, 2026. The matter is on the agenda for review and possible recommendation to the City Council by the Ordinance Committee. Staff would like to gather feedback from the Ordinance Committee relating to continuing the ordinance and any possible amendments. Any amendments requested by the Ordinance Committee will be integrated into the draft

Ordinance for review by the City Council. Staff requests that Section 95-160 be renumbered and amended to eliminate the six-month review of incidents by the City Council. After three such reports, staff does not feel it is necessary to provide data relating to violations of one specific ordinance. If staff starts to see issues or dangerous patterns of behavior relating to ATV/UTV use, then staff will present a report and recommendations for a possible solution. Staff believes there was a typo in the original ordinance, which created Section 95-160. The Section number should be 94-160 to continue the numbering pattern.

Johnson moved, seconded by Huckabee to recommend that Section 95-160 be renumbered and amended as above and recommend the City Council review the Ordinance for adoption. Motion carried.

## **5. Adjournment**

Huckabee moved, seconded by Johnson to adjourn. Meeting adjourned at 6:22 pm.

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



**CITY COUNCIL MEETING  
IN PERSON AND VIA ZOOM  
TUESDAY, MARCH 3, 2026 – 7:00 PM  
CITY HALL – SECOND FLOOR**

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**MINUTES**

**1. Call meeting to order**

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

**2. Roll call**

Present: Council members Huckabee, Johnson, Lescohier, Schultz and President Jaeckel. Also present: City Manager, City Attorney, Deputy Clerk, Director of Public Works, Museum Director, Fire Chief, and Police Chief.

**3. Pledge of Allegiance**

President Jaeckel led the Pledge of Allegiance.

**4. Consent Agenda**

*a. Review and possible action relating to the **minutes of the February 17, 2026, City Council meeting** (Ebbert, Clerk/Treasurer/Finance Director)*

Huckabee moved, seconded by Johnson to approve the Consent Agenda item #4.a. Motion carried.

**5. Public Hearings**

None.

**6. Public Comment for Matters on the Agenda**

None.

**7. Petitions, Requests, and Communications**

*a. Police Department 2025 Annual Report (Bump, Police Chief)*

Police Department 2025 Annual Report (Bump, Police Chief)

No action taken.

*b. Hoard Historical Museum 2025 Year-End Review (Lee, Museum Director)*

Hoard Historical Museum 2025 Year-End Review (Lee, Museum Director)

No action was taken.

- c. *Review and possible action relating to the proclamation declaring May 30, 2026 as **Intersectional Peony Day** in the City of Fort Atkinson (Lee, Museum Director)*  
Schultz moved, seconded by Lescohier to approve the Proclamation recognizing May 30, 2026 as Intersectional Peony Day in the City of Fort Atkinson. Motion carried.

## 8. Resolutions and Ordinances

- a. *Second and possible Third/Final reading of an Ordinance to repeal and recreate Article III of Chapter 86 of the City of Fort Atkinson Code of General Ordinances relating to **Recycling** (Navin, Director of Public Works)*

Director of Public Works Navin presented the Ordinance Committee's recommendation to repeal and recreate the City's recycling ordinance. This update is necessary to align City code with new Wisconsin Department of Natural Resources (DNR) administrative rules that went into effect on July 1, 2025. The City's existing recycling ordinance was originally adopted in 1994 to comply with state solid waste recovery laws. However, in May 2024, the Governor approved new administrative rules (specifically affecting Chapter NR 544) to update effective recycling program criteria. To be recognized by the DNR as having an "effective recycling program" under §287.11, Wis. Stats., the City is mandated to adopt these updated rules. Adopting this ordinance ensures the City continues to receive state recycling grant funding, which helps offset the costs of our local recycling program. Failure to update the ordinance would jeopardize these funds and potentially put the City out of compliance with state law.

The proposed recreation of Article III includes several technical and administrative updates required by the DNR:

- Updated Definitions: The ordinance provides clearer definitions for terms such as "multiple-family dwelling" (structures with 5 or more units), "non-residential facilities," and specific resin codes for plastic containers.
- Updates to acceptable materials: Plastics #3-#7 were not previously required to be recycled, but may be recycled with the City's contract with John's Disposal.
- Enhanced Education: The City must now review educational materials for accuracy and distribute them annually. These materials must include information on electronics, batteries, and food waste/composting.
- Multi-Family and Non-Residential Standards: Owners of multi-family dwellings must meet specific container volume ratios (e.g., at least 20 gallons of recycling space per week per unit) and provide written recycling instructions to tenants at least semiannually.
- Collection Standards: For urban municipalities like Fort Atkinson, the rules specify that curbside collection must occur at least monthly, or a drop-off site must be used by at least 80% of residents.
- Enforcement and Penalties: The update establishes a tiered forfeiture schedule for violations, ranging from \$50 for a first violation to \$2,000 for a third or subsequent

violation.

Huckabee moved, seconded by Schultz to suspend the rules and offer a third/final reading of this Ordinance. Motion carried.

Lescohier moved, seconded by Huckabee to approve the ordinance to repeal and recreate Article III of Chapter 86 of the City of Fort Atkinson Code of General Ordinances relating to Recycling. Motion carried.

- b. *Second and possible third/final reading of an Ordinance to repeal Section 95-160 of the City of Fort Atkinson Municipal Code relating to sunset and reporting requirements of the **ATV/UTV Ordinance** (Houseman, City Manager)*

Manager Houseman stated that the Ordinance Committee reviewed the current ordinance and recommend that the 6-month reporting requirement in Section 95-160 be eliminated. After three, 6-month reports, staff does not feel it is necessary to provide data relating to violations of one specific ordinance. If staff starts to see issues or dangerous patterns of behavior relating to ATV/UTV use, then staff will present a report and recommendations for a possible solution. Removing Section 95-160 from the ordinance, would eliminate both the reporting requirement and the sunset after two years. If, at any time in the future, the City Council as a whole wishes to amend or eliminate this ordinance, the Council may do so, regardless of whether a sunset provision exists.

Huckabee moved, seconded by Johnson to suspend the rules and offer a third/final reading of this Ordinance. Motion carried.

Schultz moved, seconded by Johnson to approve the ordinance to repeal Section 95-160 of the City of Fort Atkinson Municipal Code relating to sunset and reporting requirements of the ATV/UTV Ordinance.

## **9. Reports of Officers, Boards, and Committees**

- a. *City Manager's Report (Houseman, City Manager)*  
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 proposals for the City of Fort Atkinson Affordable Housing Fund Programs and Policies (Houseman, City Manager)*  
Manager Houseman reported that all three proposals met the requirements of the

request for proposals. Staff checked references provided in the proposals and found them all to be positive. All clients would work with these firms again. Staff recommends that the City Council approve the contract with Redevelopment Resources due to the experience of the firm and the proposed cost. Note that the principal at Redevelopment Resources has indicated that they have never billed a client for additional hours needed beyond the amount included in the proposal. Within the Affordable Housing Fund (Fund 9), \$25,000 was included in the 2026 adopted budget to facilitate the development of the program. Any unused funds from the development of the programs and policies would be used for the programs developed. All three proposals are within the \$25,000 budget.

Schultz moved, seconded by Huckabee to approve the proposal from Redevelopment Resources for the Affordable Housing Fund Programs at a cost not to exceed \$10,500 and authorize the City Manager to execute the contract and start the program development process. Motion carried.

*b. Review and possible action relating to the relocation of streetlights impacted by the 2026 South Main St. road project (Navin, Director of Public Works)*

Director Navin stated that part of the 2026 S. Main Street construction project, adjustments and installations related to the streetlights are required. WE Energies issued the attached authorization letter detailing the scope of work and the necessary financial commitments from the City to proceed.

The proposal from WE Energies outlines the following terms for the project as well as the attached plan to accommodate the new pedestrian path:

- **Upfront Cost:** The City is required to pay an initial charge of \$7,815.00. This quote is valid for 90 days from the date of the letter.
- **Monthly Rate Reduction:** The net monthly charges for these lighting facilities are expected to initially decrease by \$37.94, providing a recurring savings for the City's utility budget.
- **City Responsibilities:** The upfront charge does not include site restoration, which will be coordinated by staff as part of the broader pedestrian path project. Furthermore, the City is responsible for locating any private underground facilities and ensuring all necessary permissions and easements are granted without expense to WE Energies.

The upfront cost of \$7,815.00 will be funded through Fund 5 allocated for the S. Main Street Pedestrian Path project. The subsequent decrease in monthly utility charges will provide a long term benefit to the City's operating budget.

Huckabee moved, seconded by Johnson to approve the WE Energies authorization and the associated payment of \$7,815 for the relocation of streetlights impacted by the 2026 South Main St. road project. Motion carried.

**12. Miscellaneous**

None.

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

None.

**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, Johnson seconded to approve the list of Verified Claims as presented.  
Motion carried.

**15. Closed Session**

- a. *The City Council may consider a motion to convene in closed session pursuant to State Stat. §19.85(1)(c) to consider employment, promotion, compensation, or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility [annual performance review of the City Manager]*  
Huckabee moved, seconded by Johnson to convene in closed session pursuant to State Stat. Section 19.85(1)(c) to consider employment, promotion, compensation, or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility [annual performance review of the City Manager]. Motion carried.

Entered closed session at 7:47 pm

**16. Adjournment**

Schultz moved, seconded by Huckabee to adjourn. Meeting adjourned at 8:14 pm

Respectfully submitted,  
Courtney Thom  
Deputy Clerk



**LICENSE COMMITTEE MEETING  
IN PERSON AND VIA ZOOM  
MONDAY, MARCH 9, 2026 – 4:00 PM  
CITY HALL – SECOND FLOOR**

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**MINUTES**

**1. Call meeting to order**

President Jaeckel called the meeting to order at 4:00 pm.

**2. Roll call**

Present: Cm. Lescohier, Cm. Schultz and President Jaeckel. Also present: City Manager, City Clerk/Treasurer/Finance Director.

**3. New Business**

*a. Review and possible action relating to **Cigarette, Tobacco and Electronic Vaping Device Retail License Applications** for Speedy 3 LLC dba Location 2 - 303 S. Main Street for the licensing period of March 18, 2026 through June 30, 2026 (Ebbert, Clerk/Treasurer)*

Clerk Ebbert provided that the gas station at 303 S. Main Street has been operated as Kings Operating LLC since March 5, 2025. A Cigarette and Tobacco Application was submitted by Speedy 3, LLC dba Location 2 - 303 S. Main Street for use at 303 S Main Street. The State of Wisconsin regulates cigarette, tobacco and electronic vaping device licensing for local governments through State Statute Chapters 134 and 139. On December 6, 2023, Wisconsin Act 73 was signed into law. This legislation subjects electronic vaping devices to the same retail licensing requirements as cigarettes and tobacco products. As of March 6, 2024, retailers selling electronic vaping devices were required to obtain a retail license from the City. Quotas do not exist for cigarette and tobacco licenses. The application was appropriately completed with proof of Federal ID number, Wisconsin seller's permit number and background checks on the applicant.

Lescohier moved, seconded by Schultz to recommend the City Council approve the Cigarette and Tobacco Products Retail License Application for Speedy 3, LLC dba Location 2 - 303 S. Main Street for the licensing period of March 18, 2026 to June 30, 2026 contingent upon successful background checks all monies owed to the City are paid prior to license issuance by the City Clerk. Motion carried.

*b. Review and possible action relating to **Alcohol Beverage License Application** for Speedy 3 LLC dba Location 2 - 303 S. Main Street for use at 303 S. Main Street for the licensing period of March 18, 2026 through June 30, 2026 (Ebbert, Clerk/Treasurer)*

Clerk Ebbert introduced the submitted application for a Class A fermented malt beverage license. Class A offers the sale of alcohol on-site with consumption off-site (e.g. grocery or liquor store, gas station or convenience store). Local quotas exist for all Class A licenses within the City of Fort Atkinson. The gas station at 303 S. Main Street has been operated by Kings Operating LLC as of March 5, 2026. An Alcohol License Application was submitted by Speedy 3, LLC dba Location 2 - 303 S. Main Street for use at 303 S. Main Street. The applications, Alcohol License Applications, Individual Questionnaire and Appointment of Agent were completed and submitted with proof of Federal ID and Wisconsin Seller's Permit number. A letter was also provided from Kings Operating LLC stating they would surrender their Class A license contingent upon applicant Speed 3, LLC being approved.

Lescohier moved, seconded by Schultz to recommend approval of the Alcohol License Application for a Class "A" Fermented Malt Beverage License for Speedy 3, LLC dba Location 2 - 303 S. Main Street licensing period of March 18, 2026 to June 30, 2026 contingent upon successful background check and all monies owed to the City are paid prior to license issuance by the City Clerk. Motion carried.

#### **4. Adjournment**

Schultz moved, seconded by Lescohier to adjourn. Meeting adjourned at 4:13 pm.

Respectfully submitted  
Michelle Ebbert  
City Clerk/Treasurer/Finance Director



**PLAN COMMISSION MEETING  
IN PERSON AND VIA ZOOM  
TUESDAY, MARCH 10, 2026 – 4:00 PM  
CITY HALL – SECOND FLOOR**

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**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, Commissioners Ciccarelli, Shull and Kessenich. Council Representative Schultz arrived at 4:02. Also present: Clerk/Treasurer/Finance Director, City Attorney, Deputy Clerk and Director of Neighborhood and Building Services.

**3. New Business**

*a. Review and possible action relating to the **minutes of the February 10, 2026, Plan Commission meeting** (Ebbert, Clerk/Treasurer/Finance Director)*

Ciccarelli motioned to change the minutes to reflect that the extension of Commonwealth streets and sidewalks as permitted. Shull seconded. Motioned carried.

Ciccarelli moved, seconded by Shull to approve the amended minutes of the February 10, 2026 Plan Commission meeting. Motion carried.

*b. **Public Hearing:** Conditional Use Permit relating to occupancy by a construction company, including indoor business activities and ancillary equipment storage at the property located at 525 Jefferson St. (CUP-2026-02) (Draeger, Director of Neighborhood and Building Services)*

Director Draeger presented the Site Plan as required by section 15.10.32 of the City of Fort Atkinson Zoning Ordinance which outlines the requirements for the Conditional Use application and procedure. The subject property provides increased flexibility and opportunity for long-term operational growth while supporting the retention of established local businesses. While the precise number of required parking spaces has not been fully determined as part of this analysis, a commonly used benchmark for a business of this type is approximately one parking space per employee. Based on that general metric, the existing parking area located on the west side of the property, if paved and properly striped, would be capable of accommodating approximately 30 or more parking spaces. This supply would significantly exceed the current number of employees (approximately 10) and would also accommodate the applicant's projected future

workforce of approximately 20 employees.

The Conditional Use Permit (CUP) will facilitate additional vehicle and truck traffic to and from the site as part of the expanded operations. While the applicant is proposing limited improvements, including paving one ADA-compliant handicap stall, painting the exterior of the building, and installing landscaping, additional site improvements are necessary to bring the broader property into greater compliance with City standards. These improvements include paving the existing gravel parking area, installing concrete aprons, and constructing sidewalk improvements at both west parking lot approaches to the site. Sidewalk installation is also required along Clarence and Lorman Streets.

The proposed paving will increase the amount of impervious surface on the site, which requires additional landscaping under City regulations. In the opinion of City staff, the landscaping plan proposed by the applicant satisfies these requirements and provides an appropriate level of site enhancement.

City staff recommend that the sidewalk requirement along Jefferson Street be deferred at this time. Jefferson Street is anticipated to be reconstructed in the future, and sidewalk installation could be completed more efficiently as part of that coordinated public project. Future reconstruction of Jefferson Street will likely impact a portion of the existing parking area on the east side of the property, as several of those spaces currently extend into the public right-of-way. When that reconstruction occurs, those spaces will likely be reduced. The additional parking capacity available on the west side of the property will help offset this future loss and ensure that adequate on-site parking remains available.

City staff have discussed these site improvement requirements with the applicant, and the applicant has acknowledged the need to complete them. Given the scope of the required improvements, particularly the sidewalk installations, consideration should be given to allowing an extended timeline of up to one (1) year for completion. This approach would reduce the immediate financial burden while still ensuring the improvements are completed within a reasonable and defined timeframe.

The proposed development appears capable of meeting applicable City ordinances and is generally consistent with adopted City plans. The proposal supports reinvestment in an existing building and the continued operation and expansion of established local businesses, subject to compliance with the identified site and infrastructure improvements. The CUP process requires a public hearing and action at a separate meeting. However, after thorough review, City staff has prepared the following list of conditions for Plan Commission consideration at this meeting and on March 24th, when the matter returns to the Plan Commission for action:

- 1) Those conditions as listed in Section 15.10.32(9) (CUP procedure) shall apply to all Conditional Uses.
- 2) The Conditional Use permit only applies to permitting a Vehicle Service and Repair land

use on the subject property for the applicant and their associated business. If any other Conditional Use in the UMU zoning district were to be requested in the future by the applicant or a different entity on the subject property, it shall require the completion of a full new Conditional Use process (Section 15.10.32).

3) The Vehicle Service and Repair land use shall be limited to only indoor activities (Section 15.03.10(20)) as proposed by the applicant. If any outdoor activities are requested in the future, an updated Site Plan shall be required to be provided to the Plan Commission for review and approval in accordance with all applicable zoning standards (Section 15.03.10(20)(a)-(c)).

4) Outdoor activity shall be limited to only those permitted by right land uses within the UMU zoning district, including, but not limited to, Outdoor Display (Section 15.03.10(4)) and Incidental Outdoor Storage (15.03.28(17)). All applicable land use requirements associated with any outdoor activity shall be met and maintained in compliance with all the requirements of the City of Fort Atkinson Municipal Code.

5) Require all parking areas be paved with a hard surface per City Standard (15.06.06(19)).

6. Require a parking/stripping plan be submitted and approved by City Staff, which meets City ordinances.

7) Require all approaches be constructed of 6" of concrete per City Standard (15.06.06(19)).

8) Require the installation of a public sidewalk along Clarence and Lorman streets within one year of final approval of this CUP.

9) Require bicycle parking when Jefferson Street is reconstructed by the City.

10) The applicant must obtain all required permits prior to construction.

11) Any other recommendations of City staff and the Plan Commission.

Public hearing opened at 4:09 pm.

Applicant, Mike Foerster of A+ Environmental, proclaimed his excitement about the project and stated he would comply with the conditions of the staff report.

Public hearing closed at 4:12 pm.

- c. ***Public Hearing:*** regarding a Zoning Map Amendment to change the zoning district for the property located on Mehta Lane (parcels 226-0614-3231-000 and 226-0614-3242-001) from Suburban Mixed Use (SMU) to Multi-Family Residential-12 (MRM-12) (ZMA-2026-01) (Draeger, Director of Neighborhood and Building Services)

Director Draeger presented the zoning map amendment as required by section 15.10.31 of the City of Fort Atkinson Zoning Ordinance. The applicant has worked with City staff to develop the proposed project. The proposed Zoning Map Amendment aims to provide an additional housing development opportunity on the subject properties. This location comprises a mix of different land uses that includes multi-family development directly to the east. However, the amendment still continues to maintain the character and appropriate scale of development within the surrounding neighborhood. Overall, the proposed Zoning Map Amendment meets the requirements of the City's ordinances, is in alignment with adopted City plans, and will provide additional tax base and housing units

when the project is complete. The parcels are located within a Tax Incrementation District (#9). City staff recommends that the Plan Commission recommend the City Council approve the Zoning Map Amendment from SMU to MRM-12 for the subject parcels.

Note that the following land use applications are expected for this project, which will require future Plan Commission and/or City Council review and approval:

- A certified survey map combining the two parcels into one to gain right-of-way accessibility conformance with the Zoning Ordinance.
- A conditional use permit for a group development.
- Site, landscape, stormwater, and building material review through the Site Plan Review process.

Public Hearing opened at 4:15 pm.

After three calls and no comments, the public hearing was closed at 4:16 pm.

- d. **Public Hearing:** relating to a request for a General Development Plan for the property located at 23 N. Water St. E. and the westerly adjacent vacant lot (parcels 226-0514-0322-008 and 226-0514-0322-009), to change the zoning from Downtown Historic Mixed Use (DHMU) to Downtown Historic Mixed Use with a Planned Unit Development Overlay to allow for removal of a vacant building and development of a 15-stall parking lot at the site (PUD-2025-03) (Draeger, Director of Neighborhood and Building Services)

Director Draeger presented the General Development Plan (GDP) which is the first step (zoning) in the Planned Unit Development (PUD) approval process. The second step (Specific Implementation Plan), which will include a CSM to combine the lots, will come before the Plan Commission for consideration at a later date.

The applicant is proposing to demolish the existing building on the eastern parcel and combine the two parcels into a single lot to develop a 15-stall off-site parking lot. This new parking lot would provide additional spaces for bank staff and customers, helping meet parking needs as part of the bank's ongoing development. Currently, Premier Bank has an agreement with the adjacent Bienfang's Bar property for staff parking. However, this arrangement may not continue in the future, as the parking area is privately owned and access is not guaranteed long-term. In response, the proposed parking lot will serve as a replacement for the current parking spaces, ensuring long-term, dedicated parking for the bank. To assess the need for parking, the applicant conducted a parking study for the immediate area, which concluded that the proposed lot would help reduce peak parking occupancy in surrounding public parking areas in the downtown area.

City staff recommends approval of the General Development Plan, with the following conditions:

1. A recommendation to the City Council that the General Development Plan for parcels 226-0514-0322-008 and 226-0514-0322-009 be approved, subject to any and all requirements identified by the Plan Commission.
2. All other applicable standards and requirements of the underlying DHMU zoning district

shall continue to be in effect within this established PUD overlay, outside of those flexibilities noted below in item 3.

3. Nine proposed flexibilities from the DHMU zoning district standards:
  - a. Proposed flexibility to allow a permitted by-right principal land use of Off-Site Parking Lots in the DHMU zoning district is granted as proposed in the GDP submittal.
  - b. Proposed flexibility to allow a minimum pavement setback along the street, side, and rear property lines of 0 feet in the DHMU zoning district is granted as proposed in the GDP submittal.
  - c. Proposed flexibility to allow the maximum number of access points to be exceeded up to two on a parcel less than 200 feet in width is granted as proposed in the GDP submittal.
  - d. Proposed flexibility to allow the minimum number of bicycle and pedestrian connections to be less than one is granted as proposed in the GDP submittal.
  - e. Proposed flexibility to allow the minimum vision triangle standards to be less than 10 feet of visual clearance between the driveways and the public right-of-way is granted as proposed in the GDP submittal.
  - f. Proposed flexibility to allow the minimum green space areas for parking lots to be 0 feet along all property lines and between adjacent, neighboring property surface parking lots is granted as proposed in the GDP submittal.
  - g. Proposed flexibility to allow the minimum permitted throat length to be 4 feet is granted as proposed in the GDP submittal.
  - h. Proposed flexibility to allow the minimum aisle width for two-way traffic flow to be 6 feet on along the western property line is granted as proposed in the GDP submittal.
  - i. Proposed flexibility to allow the maximum footcandles at the property line to be exceeded up a maximum as defined within the SIP approval step.
4. Review and approval of a CSM providing cross-access easements with neighboring properties to the West and North and provide a utility easement to the City for replacement of an existing sanitary line, prior to approval of the Specific Implementation Plan.
5. The applicant is required to improve private storm sewer upgrades needed on the parcel and in the surrounding areas in coordination with City staff and adjoining property owners.
6. Any other recommendations of City staff or the Plan Commission.

The public hearing was opened at 4:20 pm. After three calls and no comments, the public hearing was closed at 4:21 pm.

- e. **Public Hearing:** relating to amendments to various sections of the Zoning Ordinance, Chapter 15 of the City of Fort Atkinson Code of General Ordinances, relating to the review and approval of Signs (ZTA-2026-01) (Draeger, Director of Neighborhood and Building Services)

Director Draeger stated that City staff have prepared the attached summary of proposed Zoning Text Amendments focused on Article IX: Signage. The proposed amendments would shift review and approval of Permanent Business Signs and Optional Miscellaneous Signs from the Plan Commission to administrative staff review, while retaining the existing

Plan Commission review and approval process for Electronic Message Signs and signage located within the Downtown Historic Mixed Use (DHMU) zoning district.

The proposed changes are based on the recognition that Plan Commission review of many sign types is an additional step, which may delay a property or business owner's sign project. Prior to Plan Commission consideration, staff has already worked with applicants to ensure full compliance with ordinance standards. As a result, Plan Commission review typically does not add new conditions or information once the ordinance requirements are met. In addition, the 2015 U.S. Supreme Court decision in *Reed v. Gilbert* requires sign regulations to be content neutral, limiting review to objective factors such as location, materials, and configuration. When a sign meets these standards, the Plan Commission has no authority to further regulate its design or content. The City intends to retain additional oversight where warranted. The DHMU zoning district is a highly sensitive area, and Electronic Message Signs have the potential to create external impacts on surrounding properties. Accordingly, the proposed amendments preserve the current Plan Commission review process for these sign types.

The primary policy change associated with the amendments is the shift of sign permit review and approval authority from the Plan Commission to City staff for most sign types, while retaining Plan Commission review for signage within the DHMU zoning district and for Electronic Message Signs. The City's Management Team has reviewed the proposed amendments, and all comments have been incorporated.

The public hearing opened at 4:23 pm and closed at 4:24 pm after three calls and no comments.

- f. *Review and discussion relating to the requested **Conditional Use Permit** on the property located at 525 Jefferson Street (CUP-2026-02) (Draeger, Director of Neighborhood and Building Services)*

Ciccarelli questioned if the evergreen trees in the aerial photos are part of the parcel and landscaping plan. Director Draeger believes that the trees are part of the parcel, but not counted in the current land count.

Ciccarelli further inquired about how the City would ensure that the sidewalks would be constructed at a later date. Director Draeger indicated that this would be captured within permits, letters to businesses, and other future processes.

Ciccarelli suggested when Jefferson Street is reconstructed, the City should reconsider the street parking. Director Draeger stated that parking would be addressed during the Jefferson Street reconstruction, as some of the spaces are currently in the right-of-way.

Schultz stated that if the design plan were to remove bike storage, he would be amenable since there are bike racks across the street.

No action was taken.

- g. *Review and possible recommendation to the City Council regarding a **Zoning Map Amendment** to change the zoning district for the property located on Mehta Lane (parcels 226-0614-3231-000 and 226-0614-3242-001) from Suburban Mixed Use (SMU) to Multi-Family Residential-12 (MRM-12) (ZMA-2026-01) (Draeger, Director of Neighborhood and Building Services)*

Schultz inquired about the difference between MRM-12 and SMU regarding this project. Director Draeger indicated that the biggest difference between the two is that SMU allows for commercial use, whereas MRM-12 does not. Since there is no commercial aspect to this project, the zoning amendment is being requested.

Ciccarelli questioned the possibility of making a public street in advance. Manager Houseman responded that the requirement of a new street for the development could prevent the development from taking place.

Kessenich moved to approve, and Schultz seconded to approve the recommendation to the City Council for the Zoning Map Amendment from SMU to MRM-12 for the subject parcels. Motion carried.

- h. *Review and possible recommendation to the City Council relating to a request for a **General Development Plan** for the property located at 23 N. Water St. E. and the westerly adjacent vacant lot (parcels 226-0514-0322-008 and 226-0514-0322-009), to change the zoning from Downtown Historic Mixed Use (DHMU) to Downtown Historic Mixed Use with a Planned Unit Development Overlay (PUD-2025-03) (Draeger, Director of Neighborhood and Building Services)*

Kessenich commented that she was pleased to see the mature trees on the parcels would remain and additional landscaping would be completed. She inquired about testing soil health and drainage improvement plans for the property. Director Draeger responded that he would make a note to include that in the comprehensive plan for the site.

Kessenich inquired about the availability of parking within the lot for downtown businesses. Director Draeger responded that the primary use would be for the Bank during daytime hours. Although a private lot, the parking spaces would be available for use as long as it doesn't overlap with business hours. However, the lot would remain private, and terms could change in the future.

Ciccarelli moved, seconded by Shultz to recommend to the City Council the General Development Plan for the property located at 23 N. Water St. E. and the westerly adjacent vacant lot (parcels 226-0514-0322-008 and 226-0514-0322-009), to change the zoning from Downtown Historic Mixed Use (DHMU) to Downtown Historic Mixed Use with a Planned Unit Development Overlay to allow for removal of a vacant building and development of a 15-stall parking lot at the site (PUD-2025-03). Motion carried.

- i. *Review and possible recommendation to the City Council relating to **amendments to various sections of the Zoning Ordinance, Chapter 15 of the City of Fort Atkinson Code of General Ordinances**, relating to the review and approval of Signs (ZTA-2026-01) (Draeger,*

*Director of Neighborhood and Building Services)*

Cicarelli suggested that the Planning Commission receive summary reports for the signage approved by staff. Manager Houseman agreed, and staff will implement signage reporting for the Commission.

Kessenich thinks that the projected signs option is great for the historic downtown buildings.

Shultz motioned, seconded by Shull, to recommend the City Council approve the amendments to various sections of the Zoning Ordinance, Chapter 15 of the City of Fort Atkinson Code of General Ordinances, relating to the review and approval of Signs (ZTA-2026-01). Motion carries.

*j. Review and possible recommendation to the City Council relating to a **Certified Survey Map** for the property located at 1310 Campus Dr. (CSM-2026-03) (Draeger, Director of Neighborhood and Building Services)*

Director Draeger provided that the property owner Tip of the Spear LLC has requested approval of a two-lot Certified Survey Map (CSM) for the parcel located at 1310 Campus Drive. The purpose of the CSM is to divide the existing 5.39-acre property into two separate developable lots. Proposed Lot 1 will have frontage along Campus Drive and Hawthorne Drive and will contain approximately 3.587 acres. Proposed Lot 2 will have frontage along Banker Road and will contain approximately 1.7995 acres. The property owner has submitted a request to divide the existing parcel located at 1310 Campus Drive into two separate parcels through a Certified Survey Map (CSM). The property is currently governed by an approved Planned Unit Development (PUD), including a General Development Plan (GDP) and Specific Implementation Plan (SIP), which were approved by the Plan Commission and City Council in 2023.

Under the PUD framework, the GDP establishes the general zoning and development parameters for the site, while the SIP provides the detailed site design and implementation elements. While these approvals do not have a formal expiration date, modifications to the approved plans may require amendments depending on the nature and scale of the proposed changes. The proposed land division would modify the existing lot configuration and reduce the total acreage associated with the approved development area from approximately 5.39 acres to 3.58 acres. Changes of this nature may affect several components of the previously approved development, including stormwater management, overall site density, and the ratios of building coverage and impervious surface area.

Due to the potential magnitude of these impacts, the proposed land division is considered a substantial change to the previously approved PUD plans. As a result, an amendment to the Specific Implementation Plan (SIP) will be required to evaluate how the revised parcel configuration affects the approved development layout and associated infrastructure. In addition, if the proposed lot division results in development ratios that exceed those permitted under the underlying Multi-Family Residential–30 (MRH-30) zoning district, an

amendment to the General Development Plan (GDP) may also be required.

Because the GDP functions similarly to a zoning map amendment within the PUD framework, any amendment to the GDP would require review and recommendation by the Plan Commission and final consideration by the City Council. Overall, the proposed CSM meets the requirements of the City's Land Division and Development Ordinance and the Dimensional Standards of the City's Zoning Ordinance. The CSM would also create an additional parcel that would be developable into additional residential units.

Ciccarelli recommended to make a pedestrian path in the future.

Ciccarelli motioned, seconded by Kessenich to recommend the City Council approve this preliminary Certified Survey Map, subject to the following conditions:

- Adjust the final CSM to reflect City Council President Kyle Jaeckel under the City of Fort Atkinson Approval Certificate.
- Remove access easements from the Final CSM; noted as 7 and 8 in the Easement Notes of the submitted CSM.

Motion carried

- k. *Information relating to the Habitat for Humanity Critical Repair Program (Houseman, City Manager)*

No action was taken.

- l. *Update on previously approved projects (Houseman, City Manager)*

Ciccarelli asked about the South Main Street project and moving utilities. Manager Houseman responded that yes, as part of the project, there are several minor utility updates, road rehabilitation, and path.

Manager Houseman informed Commission members that the Willow Ridge project will not move forward as proposed, as the project developer did not have control over the property, and it was sold to someone else.

No action was taken.

#### **4. Adjournment**

Kessenich moved, seconded by Schultz to adjourn. Meeting adjourned at 5:09 p.m.

Respectfully submitted,

Courtney Thom

Deputy Clerk



# Permit Report

02/01/2026 - 02/28/2026

| Permit Date | Permit # | Permit Location | Municipality | Owner Name | Permit Type | Permit Description | Estimated Project Cost | Total Fees |
|-------------|----------|-----------------|--------------|------------|-------------|--------------------|------------------------|------------|
|-------------|----------|-----------------|--------------|------------|-------------|--------------------|------------------------|------------|

**Group: Certificate of Occupancy**

|           |       |                |               |                               |                          |   |   |  |
|-----------|-------|----------------|---------------|-------------------------------|--------------------------|---|---|--|
| 2/17/2026 | 26145 | 320 S Main St. | Fort Atkinson | First United Methodist Church | Certificate of Occupancy | inspect church kitchen for a Certificate of Occupancy | 0 |  |
|           |       |                |               |                               |                          |   |   |  |

**Group Total: 1**

**Group: Demo/Raze**

|          |       |                 |               |                 |           |             |       |                |
|----------|-------|-----------------|---------------|-----------------|-----------|-------------|-------|----------------|
| 2/9/2026 | 26128 | 211 Shirley St. | Fort Atkinson | Joshua anderson | Demo/Raze | Garage raze | 1,000 | \$85.00        |
|          |       |                 |               |                 |           |             |       | <b>\$85.00</b> |

**Group Total: 1**

**Group: Electrical**

|           |       |                     |               |                        |            |  |        |         |
|-----------|-------|---------------------|---------------|------------------------|------------|--|--------|---------|
| 2/25/2026 | 26160 | 525 Stratford Ct.   | Fort Atkinson | Elliott Weber          | Electrical | Wire in new outlets, Light Switches and 12 breaker sub panel | 10,000 | \$98.00 |
| 2/17/2026 | 26142 | 314 S High St.      | Fort Atkinson | Bill & Ruth Hirschfeld | Electrical | bath & laundry remodel                                       | 0      | \$81.45 |
| 2/11/2026 | 26135 | 1226 W Sherman Ave. | Fort Atkinson | Gail Konkel            | Electrical | Add elevator   | 3,400  | \$60.00 |
| 2/11/2026 | 26134 | 1226 W Sherman Ave. | Fort Atkinson | Gail Konkel            | Electrical | Basement kitchenette   | 6,400  | \$60.00 |

|           |       |                    |               |                     |            |                                       |        |                 |
|-----------|-------|--------------------|---------------|---------------------|------------|---------------------------------------|--------|-----------------|
| 2/10/2026 | 26131 | 612 Frederick Ave. | Fort Atkinson | Amber Kastner       | Electrical | exhaust fan                           | 600    | \$60.00         |
| 2/6/2026  | 26121 | 11 Harrison St.    | Fort Atkinson | Robert Bell         | Electrical | Water Heater Replacement              | 4,000  | \$60.00         |
| 2/3/2026  | 26117 | 1301 Madison Ave.  | Fort Atkinson | 1031 Properties LLC | Electrical | Repair garage wiring (fire damage)    | 1,840  | \$60.00         |
| 2/1/2026  | 26115 | 110 S 3rd St. E    | Fort Atkinson | MacKenzie Clark     | Electrical | REWIRE-ELIMINATE KNOB AND TUBE WIRING | 18,000 | \$115.00        |
|           |       |                    |               |                     |            |                                       |        | <b>\$594.45</b> |

**Group Total: 8**

**Group: Fence**

|           |       |                 |               |               |       |                  |       |                |
|-----------|-------|-----------------|---------------|---------------|-------|------------------|-------|----------------|
| 2/10/2026 | 26129 | 325 Wilson Ave. | Fort Atkinson | Douglas Wisch | Fence | Chain link fence | 2,003 | \$60.00        |
|           |       |                 |               |               |       |                  |       | <b>\$60.00</b> |

**Group Total: 1**

**Group: HVAC**

|           |       |                    |               |                        |      |   |        |          |
|-----------|-------|--------------------|---------------|------------------------|------|---|--------|----------|
| 2/26/2026 | 26164 | 525 Stratford Ct.  | Fort Atkinson | Elliott Weber          | HVAC | Ducting supplies and returns for basement finish        | 10,000 | \$73.00  |
| 2/25/2026 | 26162 | 1125 Greene St.    | Fort Atkinson | Mark GC                | HVAC | Addition  | 5      | \$118.85 |
| 2/19/2026 | 26149 | 608 Maple St.      | Fort Atkinson | Loos Homes             | HVAC | Res NSF   | 12,000 | \$296.15 |
| 2/17/2026 | 26141 | 314 S. High St.    | Fort Atkinson | Bill & Ruth Hirschfeld | HVAC | bath & laundry remodel                                  | 0      | \$60.00  |
| 2/12/2026 | 26136 | 405 Taft St.       | Fort Atkinson | Patrick Augle          | HVAC | Replacement of the Furnace,A/C & Water Heater           | 14,735 | \$105.00 |
| 2/10/2026 | 26130 | 812 W Sherman Ave. | Fort Atkinson | Miltown Home Buyers    | HVAC | Scope of work includes modification and installation of | 0      | \$140.00 |

|          |       |                      |               |               |      |  |        |                   |
|----------|-------|----------------------|---------------|---------------|------|--|--------|-------------------|
|          |       |                      |               |               |      | ductwork to improve air distribution throughout the dwelling. Work performed included installation of a new supply air duct to the second-floor bathroom, relocation of the existing supply duct serving the first-floor bathroom, installation of a new supply air duct to the rear first-floor entrance area, installation of a new supply air duct to the finished basement area, and addition of a new return air duct in the basement for improved airflow balance. No changes were made to the existing heating equipment capacity |        |                   |
| 2/9/2026 | 26124 | 308 S FOURTH ST. W   | Fort Atkinson | Aimee Passini | HVAC | Replace Furnace and AC   | 12,547 | \$105.00          |
| 2/2/2026 | 26116 | 1131 Janesville Ave. | Fort Atkinson | Ryan Klopcic  | HVAC | Replace Makeup air unit  | 45,750 | \$135.00          |
|          |       |                      |               |               |      |  |        | <b>\$1,033.00</b> |

**Group Total: 8**

**Group: New Single Family**

|           |       |               |               |                        |                   |                   |         |                   |
|-----------|-------|---------------|---------------|------------------------|-------------------|-------------------|---------|-------------------|
| 2/13/2026 | 26139 | 608 Maple St. | Fort Atkinson | LOOS CUSTOM HOMES LLC. | New Single Family | NEW SINGLE FAMILY | 227,220 | \$3,659.00        |
|           |       |               |               |                        |                   |                   |         | <b>\$3,659.00</b> |

**Group Total: 1****Group: Other**

|          |       |                   |               |                         |       |                  |        |                 |
|----------|-------|-------------------|---------------|-------------------------|-------|------------------|--------|-----------------|
| 2/9/2026 | 26127 | 1105 Menomonee Ct | Fort Atkinson | Phillip D Martin Jr     | Other | Roof Replacement | 28,900 | \$60.00         |
| 2/9/2026 | 26126 | 1603 ENDL BLVD    | Fort Atkinson | Christopher Ketterhagen | Other | Roof Replacement | 15,300 | \$60.00         |
|          |       |                   |               |                         |       |                  |        | <b>\$120.00</b> |

**Group Total: 2****Group: Plumbing**

|           |       |                     |               |                         |          |                             |        |          |
|-----------|-------|---------------------|---------------|-------------------------|----------|-----------------------------|--------|----------|
| 2/26/2026 | 26168 | 608 Maple St.       | Fort Atkinson | Loos Homes              | Plumbing | sewer & water laterals      | 3,000  | \$200.00 |
| 2/26/2026 | 26166 | 1240 Elsie St.      | Fort Atkinson | Robert Hoefler          | Plumbing | Adding bathroom in basement | 7,000  |          |
| 2/26/2026 | 26165 | 525 Stratford Ct.   | Fort Atkinson | Elliott Weber           | Plumbing | Washer and tub moving       | 10,000 | \$60.00  |
| 2/25/2026 | 26163 | 314 S High St.      | Fort Atkinson | Bill & Ruth Hirschfeld  | Plumbing | Bathroom remodel            | 4,000  | \$75.45  |
| 2/20/2026 | 26151 | 320 Edward St.      | Fort Atkinson | Steven Holz             | Plumbing | Install Laundry hook ups    | 2,600  |          |
| 2/19/2026 | 26150 | 608 Maple St.       | Fort Atkinson | Loos Homes              | Plumbing | Res NSF                     | 14,000 | \$206.15 |
| 2/13/2026 | 26138 | 1001 McCoy Park Rd. | Fort Atkinson | Louis S Larsen          | Plumbing | Water heater replacement    | 1,200  | \$60.00  |
| 2/11/2026 | 26133 | 808 Jefferson St.   | Fort Atkinson | Logan's Hearts & Smiles | Plumbing | Bathroom Remodel            | 7,450  | \$60.00  |

|          |       |                 |               |                           |          |  |       |                 |
|----------|-------|-----------------|---------------|---------------------------|----------|--|-------|-----------------|
| 2/6/2026 | 26122 | 11 Harrison St. | Fort Atkinson | Robert Bell               | Plumbing | Water Heater Replacement                             | 4,000 | \$60.00         |
| 2/4/2026 | 26119 | 321 N High St.  | Fort Atkinson | James and Lorlife Quigley | Plumbing | Tub to pan conversion same size and location of area | 1,410 | \$60.00         |
|          |       |                 |               |                           |          |  |       | <b>\$781.60</b> |

**Group Total: 10**

**Group: Pool/Hot Tub**

|          |       |                 |               |                      |              |   |       |                |
|----------|-------|-----------------|---------------|----------------------|--------------|---|-------|----------------|
| 2/6/2026 | 26123 | 214 Hickory St. | Fort Atkinson | Corey Stark-Prohaska | Pool/Hot Tub | Add gfci breaker, wiring, and disconnect for 240v 50amp hot tub. Will be run off of 100 amp panel in garage. Hot tub will be next to garage on padio. | 1,000 | \$60.00        |
|          |       |                 |               |                      |              |   |       | <b>\$60.00</b> |

**Group Total: 1**

**Group: Right of Way Opening Permit**

|           |       |  |               |  |                             |   |   |                 |
|-----------|-------|--|---------------|--|-----------------------------|---|---|-----------------|
| 2/16/2026 | 26140 | Banker Rd, Campus Dr, and Hawthorne Dr | Fort Atkinson |  | Right of Way Opening Permit | Bored installation of 2" HDPE conduit to house fiber service              | 0 | \$100.00        |
| 2/12/2026 | 26137 | 1815 Janesville Avenue                 | Fort Atkinson |  | Right of Way Opening Permit | Direction bored installation of 2" HDPE conduit for fiber utility service | 0 | \$50.00         |
| 2/3/2026  | 26118 | Dempster St & Rankin St                | Fort Atkinson |  | Right of Way Opening Permit | GDAM REPLACEMENT  | 0 | \$200.00        |
|           |       |  |               |  |                             |   |   | <b>\$350.00</b> |

**Group Total: 3**

**Group: Roofing/Siding**

|           |       |                    |               |                           |                |  |        |                 |
|-----------|-------|--------------------|---------------|---------------------------|----------------|--|--------|-----------------|
| 2/25/2026 | 26158 | 1322 Erick St.     | Fort Atkinson | Antonio Rodriguez         | Roofing/Siding | Siding   | 25,700 | \$60.00         |
| 2/18/2026 | 26148 | 617 Grant St.      | Fort Atkinson | Kirsten and Anthony Beard | Roofing/Siding | Roof Replacement   | 28,635 | \$60.00         |
| 2/18/2026 | 26146 | 402 Raintree Dr.   | Fort Atkinson | Ruby                      | Roofing/Siding | Remove old rubber and decking install new decking and rubber | 4,800  | \$60.00         |
| 2/9/2026  | 26125 | 32 SOUTH ST.       | Fort Atkinson | Tyler Floerke             | Roofing/Siding | Asphalt roof & gutter replacement                            | 40,777 | \$60.00         |
| 2/5/2026  | 26120 | 905 W Sherman Ave. | Fort Atkinson | Dustin Roe                | Roofing/Siding | Roof replacement   | 11,775 | \$60.00         |
|           |       |                    |               |                           |                |  |        | <b>\$300.00</b> |

**Group Total: 5**

**Group: Sign**

|           |       |                     |               |                             |      |   |       |         |
|-----------|-------|---------------------|---------------|-----------------------------|------|---|-------|---------|
| 2/24/2026 | 26156 | 40 E Rockwell Ave.  | Fort Atkinson | Bruce Johnson               | Sign | Sign 36" x 72" made from aluminum with decals   | 1,500 | \$55.00 |
| 2/17/2026 | 26144 | 524 Whitewater Ave. | Fort Atkinson | Luke Walsh                  | Sign | Removing building sign and channel letters from Madison Avenue location and installing at new Whitewater Avenue location.               | 3,680 |         |
| 2/11/2026 | 26132 | 401 Madison Ave.    | Fort Atkinson | Wayne Hayes Real Estate LLC | Sign | Putting a replacement panel in an existing sign standard. Will have a temporary banner on sign indicating :New Home of Wayne Hayes Real | 350   | \$55.00 |

|  |  |  |  |  |  |  |  |                 |
|--|--|--|--|--|--|--|--|-----------------|
|  |  |  |  |  |  | Estate" Sign panel is two sided with heavy vinyl letting and logo. size is 60" wide and 24" high. Aluminum is the material the sign is built from. No lighting is planned for this sign. |  |                 |
|  |  |  |  |  |  |  |  | <b>\$110.00</b> |

**Group Total: 3**

**Group: Single Family Alteration/Addition**

|           |       |                     |               |                        |                                   |  |        |                 |
|-----------|-------|---------------------|---------------|------------------------|-----------------------------------|--|--------|-----------------|
| 2/26/2026 | 26167 | 917 Whitewater Ave. | Fort Atkinson | Daniel Way             | Single Family Alteration/Addition | Sun room - replacing existing walls and roof structures with no added square footage | 5,000  | \$120.00        |
| 2/23/2026 | 26154 | 1240 Elsie St.      | Fort Atkinson | Robert Hoefler         | Single Family Alteration/Addition | Add bathroom to basement/Basement remodel  | 40,000 |                 |
| 2/17/2026 | 26143 | 314 S. High St.     | Fort Atkinson | Bill & Ruth Hirschfeld | Single Family Alteration/Addition | bath & laundry remodel   | 50,000 | \$112.25        |
|           |       |                     |               |                        |                                   |  |        | <b>\$232.25</b> |

**Group Total: 3**

**Group: Two Family Alteration**

|           |       |                |               |            |                       |  |       |  |
|-----------|-------|----------------|---------------|------------|-----------------------|--|-------|--|
| 2/25/2026 | 26159 | 320 Edward St. | Fort Atkinson | Steve Holz | Two Family Alteration | Add laundry. Repair/replacement floor joists in down stairs bedrooms.13x24 | 3,500 |  |
|           |       |                |               |            |                       |  |       |  |

**Group Total: 1**

**Group: Windows/Doors**

|           |       |                    |               |               |               |  |        |                |
|-----------|-------|--------------------|---------------|---------------|---------------|--|--------|----------------|
| 2/25/2026 | 26161 | 1117 Harriette St. | Fort Atkinson | Roy Hernandez | Windows/Doors | Replacing (1) 3LS, (1) 2LS, and (12) double hung same sizes and location | 15,444 | \$60.00        |
|           |       |                    |               |               |               |  |        | <b>\$60.00</b> |

**Group Total: 1**

|  |  |  |  |  |  |  |  |                   |
|--|--|--|--|--|--|--|--|-------------------|
|  |  |  |  |  |  |  |  | <b>\$7,445.30</b> |
|--|--|--|--|--|--|--|--|-------------------|

**Total Records: 49**

**3/10/2026**

Jedidiah Draeger  
Neighborhood and Building Services



## MEMORANDUM

**DATE:** March 17, 2026

**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 March (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 February 17, 2026 through March 17, 2026 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 |
|-----------------|----------------------|---|------|
| Ethan Punzel    | Festival Foods       | Y   | \$15 |
| Ashley Lowe     | Country Inn & Suites | Y   | \$15 |
| Madison Koehler | Brickhouse           | Y   | \$15 |
| Prisma Sanchez  | 303 S Main St        | Y   | \$25 |
| Kayla Pucheta   | 303 S Main St        | Y   | \$25 |
| Madelyn Recob   | Tavern on Rock       | Y   | \$15 |

#### MOBILE MERCHANT

|                |   |   |      |
|----------------|---|---|------|
| Jennifer Smith | Tree Ripe Fruit – Riverstone Event Center | Y | \$75 |
|----------------|---|---|------|

#### DOOR-TO-DOOR RESIDENTIAL / DIRECT SELLER

None

**FINANCIAL ANALYSIS**

In accordance with the City's Ordinances and Fee Schedule, a total of \$75 was collected for Mobile Merchant Permits, and \$110 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:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Michelle Ebbert, Clerk/Treasurer/Finance Director

**RE:** Review and possible action relating to a Special Event: FA Summer Charity Concerts on June 10, June 24, July 15, July 29, August 12, and August 26, 2026, from 6:30-8:30 p.m. at Barrie Park (Ebbert, Clerk/Treasurer/Finance Director)

---

### BACKGROUND

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

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

### DISCUSSION

**Event:** FA Summer Charity Concerts

**Date:** Wednesdays: June 10, June 24, July 15, July 29, August 12, and August 26, 2026

**Location:** Barrie Park

**Contact Person:** Megan Hartwick; [facharityconcerts@gmail.com](mailto:facharityconcerts@gmail.com)

**Hours of Event:** 6:30 pm to 8:30 pm

**Estimated Number of Attendees:** 300+

Event information was routed to Departments without any concerns provided.

### FINANCIAL ANALYSIS

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

**RECOMMENDATION**

Staff recommends that City Council approve the Special Event FA Summer Charity Concerts in Barrie Park on Wednesday, June 10, June 24, July 15, July 29, August 12, and August 26, 2026 at Barrie Park.

**ATTACHMENTS**

- 1. Kiwanis Charity Concerts Sponsorship 2026
- 2. Kiwanis Charity Concerts Special Event App 2026
- 3. Barrie Park Map 2026



**Kiwanis**  
FORT ATKINSON, WI

# FA Summer Charity

## Concerts

### 2026 Sponsorship Opportunity



Sponsorships are available for the six FREE concerts at the bandshell this summer! The funds raised will continue to support youth engagement efforts in Fort Atkinson, including, but not limited to, BASE Fort Atkinson, the charity concert scholarship, and the Kiwanis Youth Athletic Fields. **Since 2013, the charity concerts have donated a total of \$120,988 to help connect kids with our community!**

#### Gold Sponsor - \$1,000 (5 available)

- Logo on main date banner
- Logo on bandshell banner
- Logo on Robert Street banner
- Logo on concert posters
- Facebook post
- Media press release mention
- Announcement at concerts

#### Silver Sponsor - \$750 (5 available)

- Logo on bandshell banner
- Logo on Robert Street banner
- Logo on concert posters
- Facebook post
- Media press release mention
- Announcement at concerts

#### Bronze Sponsor - \$500 (10 available)

- Logo on Robert Street banner
- Logo on concert posters
- Facebook post
- Media press release mention
- Announcement at concerts

#### 2026 Concert Details:

6:30-8:30pm

*Barrie Park Bandshell*

**June 10th:** The Belle Weather

**June 24th:** Fort Night Band

**July 15th:** Katie Scullin

**July 29th:** Altar Boy Picnic

**August 12th:** Twang Dragons

**August 26th:** Jason Thomas Band

**Please confirm your sponsorship via email BEFORE sending a check:**  
**facharityconcerts@gmail.com**

Checks payable to "Kiwanis Club of Fort Atkinson" with "charity concerts" in the memo.

Mail to:  
Kiwanis Club of Fort Atkinson  
P.O. Box 27  
Fort Atkinson, WI 53538



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

Name of Business/Group Organizing Event: **Fort Atkinson Kiwanis Club**

Contact Person for Event: **Megan Hartwick**

Phone Number: \_\_\_\_\_ Email: **facharityconcerts@gmail.com**

Day of Event Contact Person (if different from above): \_\_\_\_\_ Phone: **920.728.6061** Email: \_\_\_\_\_

**Special Event Details**

Event Name: **FA Summer Charity Concerts**

Event Date (mm/dd/yyyy): **6/10/26, 6/24/26, 7/15/26, 7/29/26, 8/12/26, 8/26/26**

Event Location: **Barrie Park**

|   |  |
|---|--|
| Estimated Number of Attendees: <b>300 per concert</b> | Hours of Event: <b>6:30-8:30pm</b>       |
| Event Setup Time: <b>4:45pm</b>                       | Event Tear Down Time: <b>8:30-9:15pm</b> |

Event Description: The 13th Annual FA Summer Charity Concert series plans to host six free concerts at the Barrie Park bandshell throughout the summer. The event is supported by local sponsorships and donations are accepted at the shows. All musicians donate their time and talent in support of our fundraising efforts. Concert attendance varies each show, but we tend to have around 300 guests per show - from all ages and walks of life! Our Kiwanis Club offers free popcorn and fun kid items at each show, and our finale show always features a donation raffle.

Goal/Purpose of Event: The purpose of the concerts is two-fold. One, they offer a free experience promoting music, joy, connection, and community. ALL are welcome and encouraged to attend. Second, they serve as a fundraiser for our Kiwanis Club, with all raised funds donated in support of efforts that promote youth engagement in Fort Atkinson. Including, but not limited to, BASE Fort Atkinson, Kiwanis Youth Fields, and the Charity Concert Scholarship.

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: 6:30pm End Time of Music: 8:30pm

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: Megan JAC

Submission Date: \_\_\_\_\_

**For Office Use Only:**

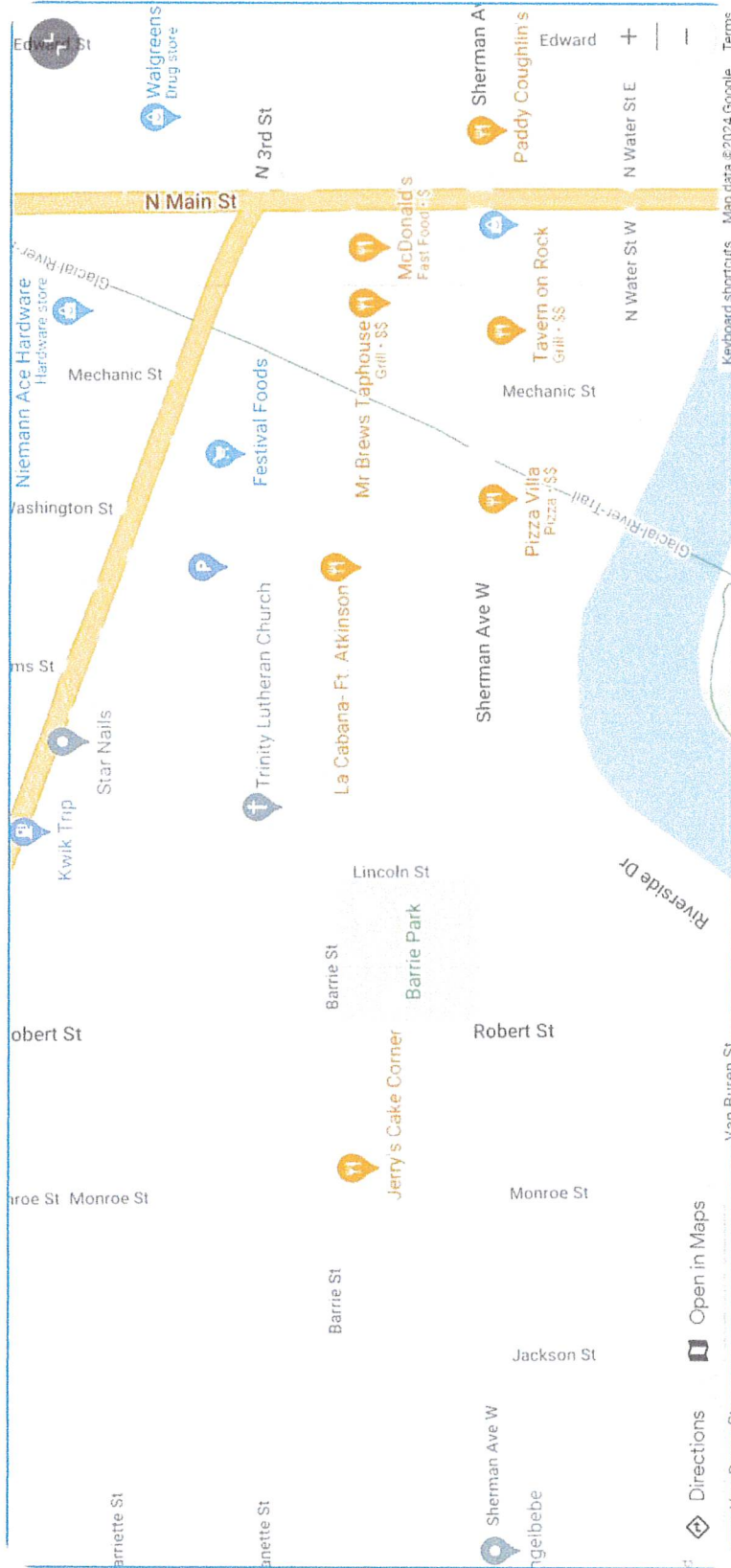
Date Received: \_\_\_\_\_

Date Paid: \_\_\_\_\_

Council Approval / Denial Date: \_\_\_\_\_

Date applicant notified of Council action and any event stipulations: \_\_\_\_\_

Event Stipulations:



There is ample parking available for the event, with street parking surrounding Barrie Park and all blocks within walking distance. Many concert guests also park in the parking lots near Trinity Church, and many walk to the show.



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Michelle Ebbert, Clerk/Treasurer/Finance Director

**RE:** Review and possible action on a Special Event: Parks & Recreation Egg Hunt, Saturday, April 4, 2026, 8:00 - 11:00 a.m. at Ralph Park (Ebbert, Clerk/Treasurer/Finance Director)

---

### BACKGROUND

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

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

### DISCUSSION

**Event:** Parks & Recreation Easter Egg Hunt

**Date and Hours of Event:** Saturday, April 4, 2026, 10:00 a.m. to 10:30 a.m.

**Event Set Up:** 8:00 am - 9:30 a.m.

**Event Tear Down:** 10:30 -11:00 a.m.

**Location:** Ralph Park

**Contact Person:** Brett Ketterman

**Estimated Number of Attendees:** 200

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: Parks & Recreation Egg Hunt, Saturday, April 4, 2026, 8:00 - 11:00 a.m. at Ralph Park.

**ATTACHMENTS**

1. Special Event Easter Egg Hunt 4.4.26
2. Ralph Park



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

Name of Business/Group Organizing Event:

Contact Person for Event:

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

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

**Special Event Details**

Event Name:

Event Date (mm/dd/yyyy):

Event Location:

Estimated Number of Attendees: \_\_\_\_\_ Hours of Event: \_\_\_\_\_

Event Setup Time: \_\_\_\_\_ Event Tear Down Time: \_\_\_\_\_

Event Description:

Goal/Purpose of Event:

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

*\* 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: \_\_\_\_\_ End Time of Music: \_\_\_\_\_

I will be closing a street(s)\*

Barricades can be provided by Public Works upon request

*\* Provide proof of permission from neighboring businesses/properties if street closure impacts daily activity*

I will be selling beer and/or wine\*

Alcohol license and licensed bartender(s) required. Contact City Clerk (920) 397-9901 prior to submitting this application.

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

I will be erecting a tent, canopy or other temporary structure.\*

*\*Event coordinator is responsible for ensuring that the temporary structure is safely installed. Event Coordinator is required to contact Diggers Hotline at least 4 business days prior to the event. Diggershotline.com, 1-800-242-8511*

I am having a walk/race\*

*\*See map instructions above. In addition to the previously listed map requirements, clearly mark your walk/race route on the map.*

**By signing, I agree to the following statements:**

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

Responsible Party Signature: \_\_\_\_\_

Submission Date:

**For Office Use Only:**

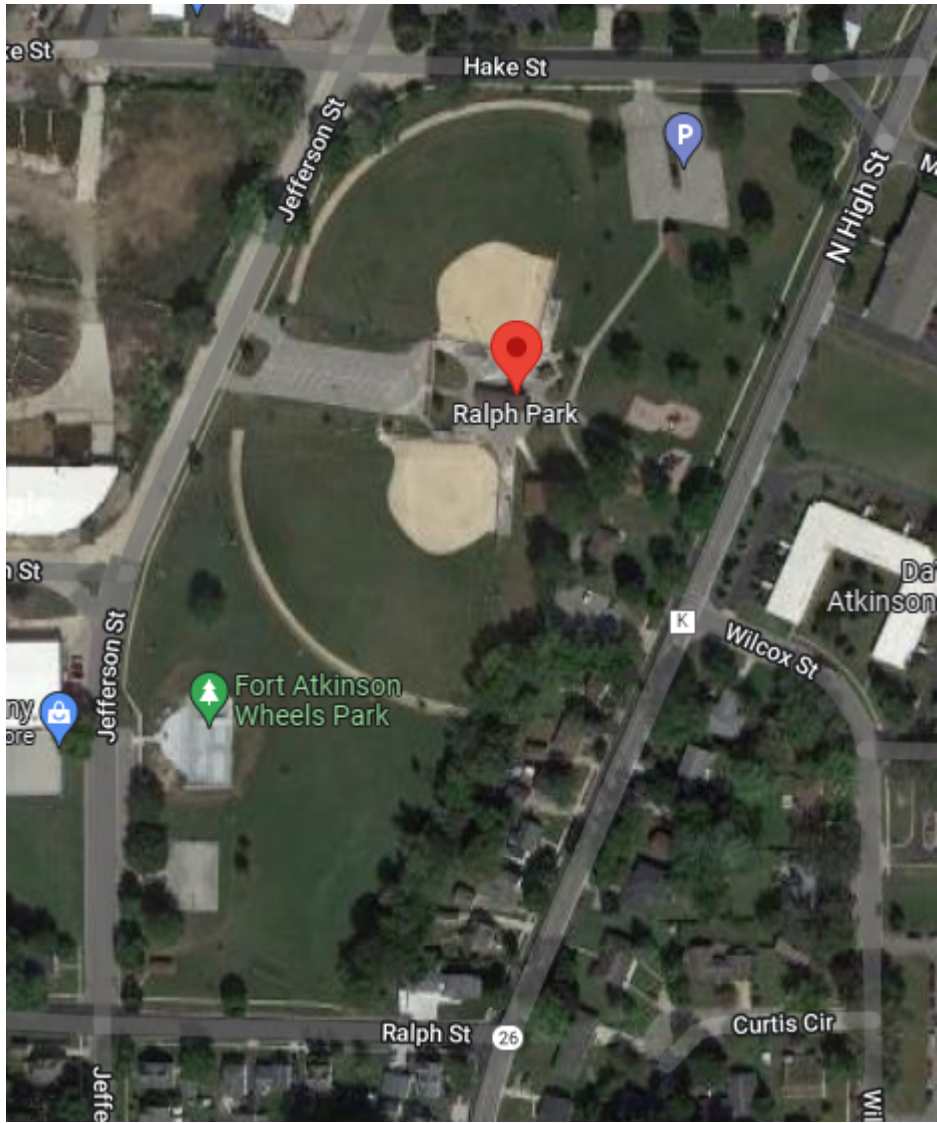
Date Received: \_\_\_\_\_

Date Paid: \_\_\_\_\_

Council Approval / Denial Date: \_\_\_\_\_

Date applicant notified of Council action and any event stipulations: \_\_\_\_\_

Event Stipulations:





## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Michelle Ebbert, Clerk/Treasurer/Finance Director

**RE:** Review and possible action on a Special Event: Park & Recreation Youth Triathlon, Saturday, July, 25, 2026, 8:00 - 1:00 a.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.

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### DISCUSSION

**Event:** Parks & Recreation Youth Triathlon  
**Date:** Saturday, July 25, 2026  
**Location:** Rock River Park, Aquatic Center, Montclair Place  
**Contact Person:** Brett Ketterman  
**Hours of Event:** 8:00 a.m. to 11:00 a.m.  
**Event Set Up:** Friday all day & Saturday morning  
**Event Tear Down:** 11:00 a.m.– 1:00 p.m.  
**Estimated Number of Attendees:** 300

Participants aged 7 to 14 will swim at the Aquatic Center, bike on the road through Rock River Park and Montclair Street. Participants will then run on Sinnissippi Drive in the park to the

archery range and back. Over 50 volunteers will be helping direct kids where to go, on the swim deck, on the course, and throughout the location.

Event information was routed to Departments without any concerns provided.

### **FINANCIAL ANALYSIS**

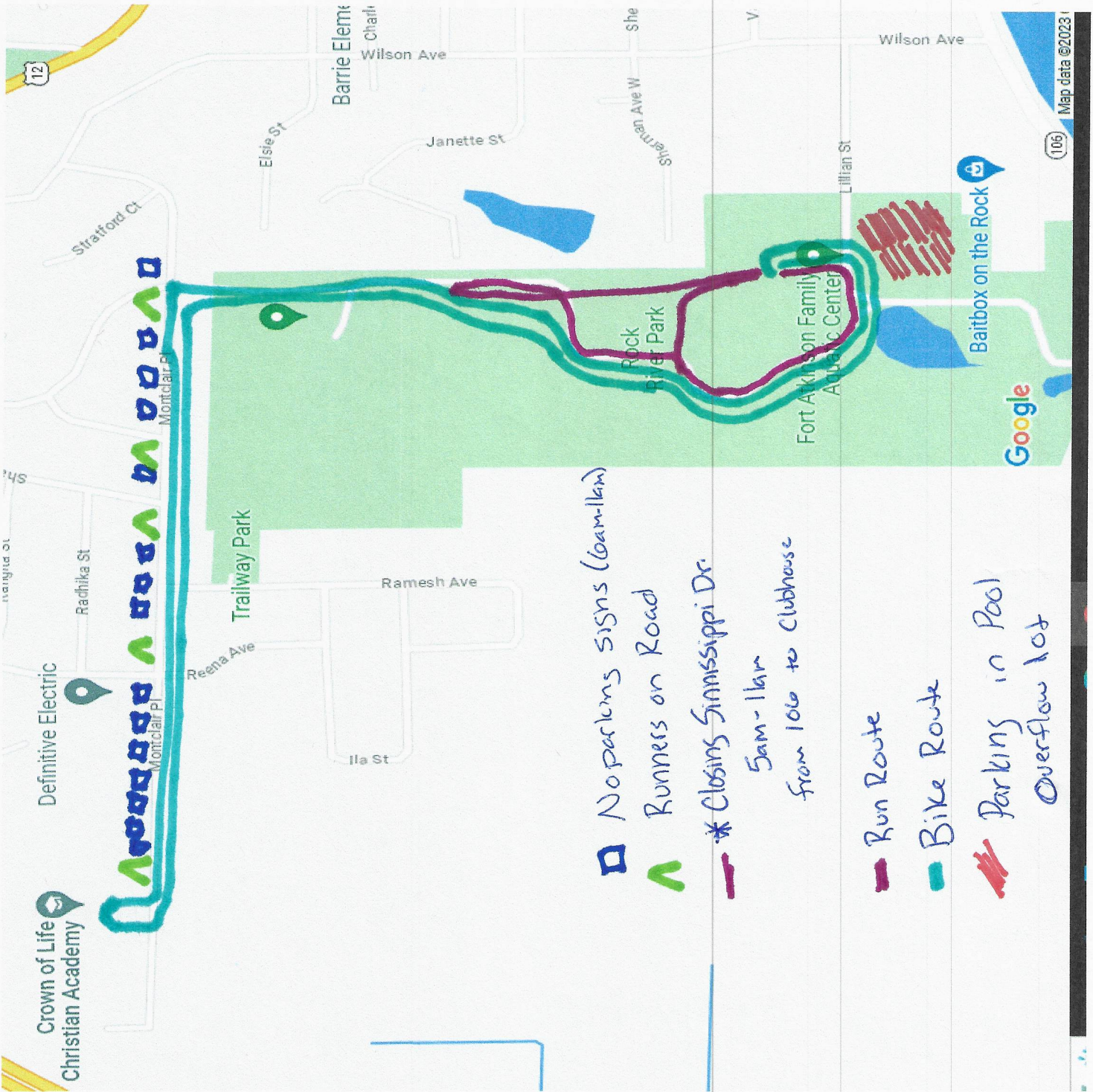
There is no financial impact to the City of Fort Atkinson for the event.

### **RECOMMENDATION**

Staff recommends that City Council approve the Special Event Youth Triathlon for the Parks & Recreation to be held on Saturday, July 25, 2026 at Rock River Park, Aquatic Center and Montclair Subdivision and approve closure of Sinnissippi Drive from 7:00 am to 11:00 pm.

### **ATTACHMENTS**

1. Triathalon Map
2. Special Event Youth Triathlon 7.25.26



□ No parking signs (60m/1km)

▲ Runners on Road

— \* Closing Sinissippi Dr

5am - 11am  
from 106 to clubhouse

— Run Route

— Bike Route

/// Parking in Pool  
Overflow lot



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

Name of Business/Group Organizing Event:

Contact Person for Event:

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

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

**Special Event Details**

Event Name:

Event Date (mm/dd/yyyy):

Event Location:

Estimated Number of Attendees: \_\_\_\_\_ Hours of Event: \_\_\_\_\_

Event Setup Time: \_\_\_\_\_ Event Tear Down Time: \_\_\_\_\_

Event Description:

Goal/Purpose of Event:

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

*\* 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: \_\_\_\_\_ End Time of Music: \_\_\_\_\_

I will be closing a street(s)\*

Barricades can be provided by Public Works upon request

*\* Provide proof of permission from neighboring businesses/properties if street closure impacts daily activity*

I will be selling beer and/or wine\*

Alcohol license and licensed bartender(s) required. Contact City Clerk (920) 397-9901 prior to submitting this application.

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

I will be erecting a tent, canopy or other temporary structure.\*

*\*Event coordinator is responsible for ensuring that the temporary structure is safely installed. Event Coordinator is required to contact Diggers Hotline at least 4 business days prior to the event. Diggershotline.com, 1-800-242-8511*

I am having a walk/race\*

*\*See map instructions above. In addition to the previously listed map requirements, clearly mark your walk/race route on the map.*

**By signing, I agree to the following statements:**

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

Responsible Party Signature: \_\_\_\_\_

Submission Date: \_\_\_\_\_

**For Office Use Only:**

Date Received: \_\_\_\_\_

Date Paid: \_\_\_\_\_

Council Approval / Denial Date: \_\_\_\_\_

Date applicant notified of Council action and any event stipulations: \_\_\_\_\_

Event Stipulations:



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Michelle Ebbert, Clerk/Treasurer/Finance Director

**RE:** Review and Possible action on a Special Event: Wings & Wheels Fly-In Breakfast, Sunday, May 31, 2026, 8 a.m.-12 p.m. at the Fort Atkinson Municipal Airport (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.

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### DISCUSSION

**Event:** Wings & Wheels Fly-In Breakfast

**Date:** Sunday, May 31, 2026

**Location:** Fort Atkinson Municipal Airport, Hwy K

**Contact Person:** Alicia Norris; [alicia@basefortatkinson.org](mailto:alicia@basefortatkinson.org)

**Hours of Event:** 8:00 a.m.-12:00 p.m.

**Event Setup:** 6:00 a.m. – 8:00 a.m.

**Event Tear Down:** 12:00 p.m. – 2:00 p.m.

**Estimated Number of Attendees:** 750

<https://www.basefortatkinson.org/wingswheels>

Event information was routed to Departments without any concerns provided.

**FINANCIAL ANALYSIS**

In accordance with the City's Ordinances and fee schedule, a total of \$25 was collected.

**RECOMMENDATION**

Staff recommends that City Council approve the Special Event for BASE: Wings & Wheels Fly-In Breakfast on Sunday May 31, 2026.

**ATTACHMENTS**

- 1. BASE Special Event Application Wings & Wheels 2026



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

Name of Business/Group Organizing Event:

Contact Person for Event:

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

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

**Special Event Details**

Event Name:

Event Date (mm/dd/yyyy):

Event Location:

Estimated Number of Attendees: \_\_\_\_\_ Hours of Event: \_\_\_\_\_

Event Setup Time: \_\_\_\_\_ Event Tear Down Time: \_\_\_\_\_

Event Description:

Goal/Purpose of Event:

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

*\* 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: \_\_\_\_\_ End Time of Music: \_\_\_\_\_

I will be closing a street(s)\*

Barricades can be provided by Public Works upon request

*\* Provide proof of permission from neighboring businesses/properties if street closure impacts daily activity*

I will be selling beer and/or wine\*

Alcohol license and licensed bartender(s) required. Contact City Clerk (920) 397-9901 prior to submitting this application.

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

I will be erecting a tent, canopy or other temporary structure.\*

*\*Event coordinator is responsible for ensuring that the temporary structure is safely installed. Event Coordinator is required to contact Diggers Hotline at least 4 business days prior to the event. Diggershotline.com, 1-800-242-8511*

I am having a walk/race\*

*\*See map instructions above. In addition to the previously listed map requirements, clearly mark your walk/race route on the map.*

**By signing, I agree to the following statements:**

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

Responsible Party Signature: \_\_\_\_\_

Submission Date: \_\_\_\_\_

**For Office Use Only:**

Date Received: \_\_\_\_\_

Date Paid: \_\_\_\_\_

Council Approval / Denial Date: \_\_\_\_\_

Date applicant notified of Council action and any event stipulations: \_\_\_\_\_

Event Stipulations:



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Michelle Ebbert, Clerk/Treasurer/Finance Director

**RE:** Review and possible action on a Special Event: Rhythm on the River, August 29, 2026 from 5:00 - 9:00 p.m. at the Merchant Ave./N Water Street W./Municipal Lot/Boat Launch (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

#### Fort Atkinson Lion's Club

**Event:** Rhythm on the River

**Dates and Hours of Event:** Saturday August 29, 2026, 5:00-9:00 pm

**Set Up/Tear Down:** 12:00 pm closure of parking lot. 9:00-10:00 pm clean up.

**Location:** Merchant Ave, N Water St W/Municipal Lot/Boat Launch

**Contact Person:** Tom Gebhardt: [gebhat@charter.net](mailto:gebhat@charter.net), 608-290-3397 and Michelle Ebbert: [mebbert@fortatkinsonwi.gov](mailto:mebbert@fortatkinsonwi.gov)

**Estimated Number of Attendees:** 2000

The application and event information was routed to all City Departments with comments provided:

Wastewater: The lift station that is in the municipal lot to remain clear the entire event. Map provided.

Water: Map provided of area to be cleared if water emergency.

Police Department: Staffed for the event, will confirm decibel readers.

A map is attached that shows the closure of Merchant Ave, N Water St W, where vehicles for volunteers, the band, and the stage company will be parked. Other entrances to the parking lot will be blocked, barricaded or allow for the parking of Emergency Vehicles. There may be minor adjustments to the map pending food tables, ticket booth, etc.

Alcohol sales will begin at 4:00 pm with 'last call' around 8:30 / 8:45 pm. The band is scheduled to end at 9:00 pm. Local businesses support the ending at 9:00 pm along with area residents.

### **FINANCIAL ANALYSIS**

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

### **RECOMMENDATION**

Staff recommends that City Council approve Rhythm on the River on August 29, 2026 from 5:00 to 9:00 pm.

### **ATTACHMENTS**

1. RHYTHM ON THE RIVER APP 8.29.26
2. Rhythm on the River 08292026 Layout
3. Water Emergency Map
4. Wastewater Emergency Map



**CITY OF FORT ATKINSON**  
**Special Event Application**

Fee: \$25.00

Name of Business/Group Organizing Event: Fort Atkinson Lions Club

Contact Person for Event: Tom Gebhardt, Kevin Becker, Micah Frohmader, Michelle Ebbert

Phone Number: 920-728-1014

Email: gebhat@charter.net

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

Phone: 608-290-3397

Email:

**Special Event Details**

Event Name: Rhythm on the River

Event Date (mm/dd/yyyy): Saturday August 29, 2026

Event Location: Merchant Ave/N Water Street W/ Municipal Lot / Boat Launch

Estimated Number of Attendees: 2,000

Hours of Event: 5:00 pm to 9:00 pm. Band begins 5:30 pm

Event Setup Time: Stage to be delivered in the morning with set up during the day.

Event Tear Down Time: Start tear down !

Event Description: The Fort Atkinson Lions Club with partnership of other local civic organizations, is excited for the 2nd year of Rhythm on the River to return. A live band will begin performing at 5:30 pm with end time of 9:00 pm. Wristbands will be provided to those of legal age and are to be worn during the event. Food trucks/vendors will be set up inside the parking lot. Concrete barriers will be placed accordingly for safety. This location will allow an ambulance and squad car to be placed. Last call for alcohol sales is 8:45 pm, same as last year without issues.

Goal/Purpose of Event: The purpose is for community gathering and celebration. In 2025, the event was safely held without issues. Plenty of volunteers assured of age attendees, maintained crowd control and the site was clean up before midnight. The Lions donated to other organizations that assisted with the event. The Lions seek to have a positive presence in the community and grow membership.

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, ballfield, or shelter

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 require 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.

Renting white folding tables. Request

Additional Garbage/Recycling Can\*

Qty \_\_\_\_\_

barricades as required by Public Safety.

Barricades\*

Qty 5-6

Traffic Cones\*

Qty 10

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: Will work with Electrician for process coverage of equipment. Beverage trailer onsite will be connected to the light pole.

I will be having music

(Per City Ordinance 17.03) no ~~permitted~~ cause or allow loud, excessive or unusual noise that will disturb the

Music ending 9:00 pm

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: Warm up 4:30, Start 5:30 pm End Time of Music: 9:00 pm

I will be closing a street(s)\*  
Small entrance to lot off Main Street

Street closure is determined by the Police and Fire Departments and dependent on traffic, parking, safety, and access concerns.

\* Provide proof of permission from neighboring businesses/properties if street closure impacts daily activity

I will be selling beer and/or wine\*  
Temporary License applied for

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.\*

Pop up tents only.

\*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

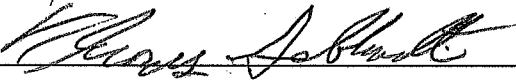
I am having a walk/race\*

\*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:



Submission Date:

Cash or Check payment payable to:

City of Fort Atkinson, 101 N. Main St, Fort Atkinson, WI 53538

**For Office Use Only:**

Date Received: \_\_\_\_\_

Date Paid: \_\_\_\_\_

Council Approval / Denial Date: \_\_\_\_\_

Date applicant notified of Council action and any event stipulations: \_\_\_\_\_

Event Stipulations:

**Sherman @ Mechanic St:** Allowance for Stage, Band, Food Vendors. Emergency access.



**Alley way Access:** 3-4 Jersey Barriers for complete closure. Opening blocked during entire event.

**Main St Entrance:** Barricades, cones, saw horses

**Main St @ N Water St West Entrance:** Allowance for Stage, Band, Food Vendors. Emergency access.

Sherman @ Mechanic St: Allowance for Stage, Band, Food Vendors. Emergency access.



Water Dept will need access to parking area in the event of a water emergency.

Main St Entrance: Barricades, cones, saw horses



This area needs to stay clear should we have to access our pumps at the lift station in emergency.

**Sherman @ Mechanic St:** Allowance for Stage, Band, Food Vendors. Emergency access.

Bathroom

Vendors

Vendors

Vendors

Stage

**Alley way Access:** 3-4 Jersey Barriers for complete closure. Opening blocked during entire event.

**Main St Entrance:** Barricades, cones, saw horses

BAR

Bathroom

**Main St @ N Water St West Entrance:**  
Allowance for Stage, Band, Food Vendors.  
Emergency access.



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Michelle Ebbert, Clerk/Treasurer/Finance Director

**RE:** Review and possible action relating to Cigarette, Tobacco and Electronic Vaping Device Retail License Applications for Speedy 3 LLC dba Location 2 - 303 S. Main Street for the licensing period of March 18, 2026 through June 30, 2026 (Ebbert, Clerk/Treasurer)

---

### BACKGROUND

The State of Wisconsin regulates cigarette, tobacco and electronic vaping device licensing for local governments through State Statute Chapters 134 and 139. On December 6, 2023, Wisconsin Act 73 was signed into law. This legislation subjects electronic vaping devices to the same retail licensing requirements as cigarettes and tobacco products. As of March 6, 2024, retailers selling electronic vaping devices were required to obtain a retail license from the City. The Department of Revenue updated their existing Cigarette and Tobacco Retailers License application to include Electronic Vaping Products.

**134.65(1)(d)** No person shall in any manner, or upon any pretense, or by any device, directly or indirectly sell, expose for sale, possess with intent to sell, exchange, barter, dispose of or give away any cigarettes, electronic vaping devices, or tobacco products to any person not holding a license as herein provided or a permit under ss. [139.30](#) to [139.41](#) or [139.79](#) without first obtaining a license from the clerk of the city, village or town wherein such privilege is sought to be exercised.

### DISCUSSION

The gas station at 303 S. Main Street has been operated as Kings Operating LLC since March 5, 2025. A Cigarette and Tobacco Application was submitted by Speedy 3, LLC dba Location 2 - 303 S. Main Street for use at 303 S Main Street. Quotas do not exist for cigarette and tobacco licenses.

The following information was provided and confirmed.

- Confirmation of Legal Name (corporation, limited liability company, partnership)
- Trade or Business Name

- Background check on Agent/Applicant

### **FINANCIAL ANALYSIS**

Cigarette, Tobacco and Electronic Vaping Device Retail License fee for the licensing period of March 18, 2026, to June 30, 2026, is \$100.00. Cigarette license fees are not pro-rated.

### **RECOMMENDATION**

The License Committee reviewed the application and recommended City Council approval at their March 9, 2026 meeting.

Staff recommends the City Council approve the Cigarette and Tobacco Products Retail License Application for Speedy 3, LLC dba Location 2 - 303 S. Main Street for the licensing period of March 18, 2026, to June 30, 2026, contingent upon monies owed to the City are paid prior to license issuance by the City Clerk.

### **ATTACHMENTS**

1. Speedy 3 LLC Cigarette Application\_Redacted

| FOR CLERKS ONLY |  |
|-----------------|--|
| Municipality    |  |
| License Period  |  |

Form  
CTV-100

# Cigarette, Tobacco, and Electronic Vaping Device Retail License Application

## Part A: Premises/Business Information

|  |  |  |                                      |
|--|--|--|--------------------------------------|
| 1. Legal Business Name (individual name if sole proprietor)<br>Speedy 3 LLC  |  |  |                                      |
| 2. Business Trade Name or DBA<br>LOCATION 2 - 303 S MAIN ST FORT ATKINSON WI 53538-2240  |  |  |                                      |
| 3. FFIN<br>41-3655181  |  | 4. Wisconsin Seller's Permit Number<br>456-1032247803-02 |                                      |
| 5. Entity Type (check one)<br><input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input checked="" type="checkbox"/> Limited Liability Company <input type="checkbox"/> Corporation   |  |  |                                      |
| 6. State of Organization<br>Wisconsin  |  | 7. Date of Organization<br>01/22/2026                    | 8. Wisconsin DFI Registration Number |
| 9. Premises Address (do not use PO Box)<br>303 S Main St,  |  |  |                                      |
| 10. City<br>Fort Atkinson  |  | 11. State<br>WI  | 12. Zip Code<br>53538                |
| 13. County<br>Jefferson  | 14. Governing Municipality: <input checked="" type="checkbox"/> City <input type="checkbox"/> Town <input type="checkbox"/> Village<br>of: Fort Atkinson |  | 15. Aldermanic District              |
| 16. Mailing Address (if different from premises address)   |  |  |                                      |
| 17. City   |  | 18. State  | 19. Zip Code                         |
| 20. Premises Phone   |  | 21. Premises Email<br>speedygasstation@gmail.com         | 22. Website                          |
| 23. Premises Description - Describe the building or buildings where cigarettes, tobacco products, and electronic vaping devices are to be sold and stored. Describe all rooms including living quarters, if used, for the sales and/or storage of cigarettes, tobacco products, and electronic vaping devices and records. Cigarettes, tobacco products, and electronic vaping devices may be sold and stored ONLY on the premises described in this application. Attach a floor plan if possible.<br><br><i>Behind the counter and back stock room.</i> |  |  |                                      |

## Part B: Questions

|  |  |  |  |
|--|--|--|--|
| 1. What products will be sold at this business location? (check all that apply)<br><input checked="" type="checkbox"/> Cigarettes <input checked="" type="checkbox"/> Tobacco Products <input checked="" type="checkbox"/> Electronic Vaping Devices   |  |  |  |
| 2. How will cigarettes, tobacco, and/or electronic vaping devices be sold? (check all that apply)<br><input type="checkbox"/> Over the counter <input type="checkbox"/> Vending machine  |  |  |  |
| 3. Is the applicant business owned by another business entity? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>If yes, provide the name(s) and FEIN(s) of the business entity(s) below. Attach additional sheets if necessary<br>3a. Name of Business Entity: _____<br>3b. FEIN of Business Entity: _____ |  |  |  |

**Part C: Individual Information**

List the name, title, and phone number for each person or entity holding the following titles or positions in the applicant business and any businesses listed in Part B, Question 3: sole proprietor: all officers, directors, and agents of a corporation: all partners of a partnership: and all members and agents of a limited liability company. Attach additional sheets if necessary.

Include Form CTV-101, *Individual Questionnaire*, for each person listed below.

| Last Name          | First Name | Title   | Phone |
|--------------------|------------|---------|-------|
| Campechano Pucheta | Hector     | Partner |       |
| Elizabeth Pucheta  | Kayla      | Partner |       |
|                    |            |         |       |
|                    |            |         |       |

**Part D: Attestation**

One of the following must sign and attest to this application:  
 • sole proprietor      • one general partner of a partnership      • one corporate officer      • one managing member of an LLC

**READ CAREFULLY BEFORE SIGNING:**

I understand and agree to the following:

- I will only purchase cigarettes, tobacco, and vapor products from distributors, jobbers, or subjobbers permitted by the Wisconsin Department of Revenue, unless I also hold the proper distributor's permit and pay all applicable excise taxes.
- I will not purchase or exchange products from another retailer, including transferring existing stock to a new owner.
- I will provide tobacco sales training that has been approved by the Wisconsin Department of Health Services to my employees. (<https://witobaccocheck.org>).
- I will not sell single cigarettes.
- I will not sell, give, or otherwise provide cigarettes, tobacco, or any nicotine products to minors.
- I will keep product invoices on the licensed premises for two years and ensure the records are available for inspection by law enforcement. Failure to comply with this will result in criminal penalties, including loss of inventory.
- I will not sell cigarettes or roll-your-own (RYO) tobacco products unless listed on the Wisconsin Department of Justice's directory of certified tobacco manufacturers and brands.

Further, under penalty provided by law, I state that this application has been truthfully answered to the best of my knowledge. I agree to operate this business according to law and that the rights and responsibilities conferred by the license(s), if granted, cannot be assigned to another. Any lack of access to any portion of a licensed premises during inspection will be deemed a refusal to allow inspection. Such refusal is a misdemeanor and grounds for revocation of this license. Any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000 if convicted.

|  |                  |
|--|------------------|
| Signature<br> | Date<br>02/13/26 |
|--|------------------|

Name (Last, First, M.I.)  
Hector Campechano Pucheta

|                  |                                     |       |
|------------------|-------------------------------------|-------|
| Title<br>Partner | Email<br>speedygasstation@gmail.com | Phone |
|------------------|-------------------------------------|-------|

**Part E: For Clerk Use Only**

|                                       |                                 |                      |                |
|---------------------------------------|---------------------------------|----------------------|----------------|
| Date application was filed with clerk | Date license issued             | Date license expires | License number |
| License fees                          | Signature of Clerk/Deputy Clerk |                      |                |

Click mouse in 'Date' field to begin and tab throughout. Use mouse to check appropriate boxes, spacebar or enter.

Save Print

Date 02/13/2026

Form CTV-101

## Cigarette, Tobacco, and Electronic Vaping Device - Individual Questionnaire

| Part A: Business Information  |                                      |   |                                      |
|---|--------------------------------------|---|--------------------------------------|
| 1. Legal Business Name (Individual name if sole proprietor)<br>Speedy 3 LLC             |                                      |   |                                      |
| 2. Business Trade Name or DBA<br>LOCATION 2 - 303 S MAIN ST FORT ATKINSON WI 53538-2240 |                                      |   |                                      |
| 3. Entity Type (check one)  |                                      |   |                                      |
| <input type="checkbox"/> Sole Proprietor  | <input type="checkbox"/> Partnership | <input checked="" type="checkbox"/> Limited Liability Company | <input type="checkbox"/> Corporation |

| Part B: Individual Information                    |                           |   |                                 |
|---|---------------------------|---|---------------------------------|
| 1. Name (Last)<br>Campechano Pucheta              | 2. Name (First)<br>Hector | 3. Name (M.I.)  |                                 |
| 4. Relationship to Business (Title)<br>Partner    | 5. Email<br>[REDACTED]    | 6. Phone  |                                 |
| 7. Home Address<br>[REDACTED]                     |                           |   |                                 |
| 8. City<br>[REDACTED]                             | 9. State<br>WI            | 10. Zip Code<br>[REDACTED]                                  | 11. Date of Birth<br>[REDACTED] |
| 12. Drivers License/State ID Number<br>[REDACTED] |                           | 13. Drivers License/State ID State of Issuance<br>Wisconsin |                                 |

| Part C: Individual's Address History  |        |       |          |
|---|--------|-------|----------|
| List in chronological order all of your addresses within the last 5 years. Attach additional sheets if necessary. |        |       |          |
| Previous Address 1  | City   | State | Zip Code |
| Previous Address 2  | City   | State | Zip Code |
| Previous Address 3  | City   | State | Zip Code |
| Previous Address 4  | City   | State | Zip Code |
| Previous Address 5  | City   | State | Zip Code |
| Previous Address 6  | City   | State | Zip Code |
| If applicable, list all states and counties you have lived in as an adult. Attach additional sheets if necessary. |        |       |          |
| State   | County | State | County   |
| State   | County | State | County   |

Continued →

**Part D: Individual's Criminal History**

1. Have you ever been convicted of any offenses (other than traffic offenses) for violation of any federal, Wisconsin, or another state's laws, or of any county or municipal ordinances?  Yes  No

If yes to question 1, please list details of each conviction below:

|                        |          |   |
|------------------------|----------|---|
| Law/Ordinance Violated | Location | Trial Date  |
| Penalty Imposed        |          | Was sentence completed? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Law/Ordinance Violated | Location | Trial Date  |
| Penalty Imposed        |          | Was sentence completed? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Law/Ordinance Violated | Location | Trial Date  |
| Penalty Imposed        |          | Was sentence completed? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |

2. Are charges for any offenses currently pending against you (other than traffic offenses) for violation of any federal, Wisconsin, or another state's laws or any county or municipal ordinances?  Yes  No

If yes to question 2, describe nature and status of pending charges using the space below. Attach additional sheets as needed.

**Part E: Attestation by Individual**

**READ CAREFULLY BEFORE SIGNING:** I understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on an application for cigarette, electronic vaping devices, and tobacco products retail license may be required to forfeit not more than \$1,000 if convicted. I declare under penalties of the law that I have examined this information and, to the best of my knowledge, it is true, correct, and complete to the best of my knowledge and belief.

Signature  Date 02/13/20

**Part F: Licensing Authority Approval**

I hereby certify that I have checked municipal and state criminal records. To the best of my knowledge, with the available information, this individual does not have a criminal record that would disqualify them from having an interest in a cigarette, tobacco product, or electronic vaping device retailer license according to sec. 134.65(1m), Wis. Stats.

Name of Local Official \_\_\_\_\_ Title \_\_\_\_\_  
 Signature of Local Official \_\_\_\_\_ Date \_\_\_\_\_

Form CTV-102

Cigarette, Tobacco, and Electronic Vaping Device Appointment of Agent

Date 02/16/2026

Agent Type (check one): [x] Original [ ] Change

Part A: Agent Information. Fields include Last Name (Campechano Pucheta), First Name (Hector), M.I., Email, Phone, City, State (WI), Zip Code, and Drivers License/State of Issuance (Wisconsin).

Part B: Questions. Question 1: Have you completed Form CTV-101... [x] Yes [ ] No. Question 2: If this is a change of agent, please describe the reason for the agent change.

Part C: Business Information. Fields include Legal Business Name (Speedy 3 LLC), Business Trade Name or DBA (LOCATION 2 - 303 S MAIN ST FORT ATKINSON WI 53538-2240), Entity Type (Limited Liability Company), and Premises Address (303 S Main St, Fort Atkinson, WI 53538).

Part D: Attestations. Includes a signature block for the Licensee or Permittee (Hector Campechano Pucheta, Parmer) and a signature block for the Agent, both dated 02/13/26.



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Michelle Ebbert, Clerk/Treasurer/Finance Director

**RE:** Review and possible action relating to Alcohol Beverage License Application for Speedy 3 LLC dba Location 2 - 303 S. Main Street for use at 303 S. Main Street for the licensing period of March 18, 2026 through June 30, 2026 (Ebbert, Clerk/Treasurer)

### BACKGROUND

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

*Table 1: Type of license, beverage and where consumption is permitted.*

| <u>Type of License</u>        | <u>Type of Beverage</u> | <u>Consumption Location</u> |
|-------------------------------|-------------------------|-----------------------------|
| "Class A"                     | Intoxicating Liquor     | Off-site                    |
| Class "A"                     | Fermented Malt          | Off-site                    |
| "Class A" Liquor: Cider Only* | Cider Only              | Off-site                    |
| "Class B"                     | Intoxicating Liquor     | On-site                     |
| Class "B"                     | Fermented Malt          | On-site                     |
| "Class C"                     | Wine only               | On-site                     |
| Reserve "Class B"             | Intoxicating Liquor     | On-site                     |
| Temporary Class "B" **        | Fermented Malt          | On-site                     |
| Temporary "Class B" **        | Wine                    | On-site                     |

\*The 2015-17 Wisconsin State Budget (2015 Act 55) provides that municipalities shall issue a "Class A" liquor license if both of the following apply:

- The “Class A” liquor license application is for sales limited to cider products only.
- The application for a “Class A” liquor license holds a Class “A” beer license for the same premises.

2015 Act 55 provision also defines ‘cider’ to mean any alcohol beverage that is obtained from the fermentation of the juice of apples or pears and that contains not less than 0.5 percent alcohol by volume and not more than 7.0 percent alcohol by volume. “Cider” includes flavored, sparkling, and carbonated cider.

\*\* Temporary Class “B” Fermented Malt and Temporary “Class B” Wine – these licenses are issued throughout the year to lodges, societies, bona fide clubs, chambers, non-profit, etc.

*Table 2: Combination of Licenses*

| <b><u>License Combinations</u></b>          | <b><u>Type of Beverage(s)</u></b>      | <b><u>Consumption Location</u></b> |
|---|--|------------------------------------|
| “Class A” and Class “A”                     | Intoxicating Liquor and Fermented Malt | Off-site                           |
| Class “A” and “Class A” Liquor: Cider Only  | Fermented Malt and Cider               | Off-site                           |
| “Class B” and Class “B”                     | Intoxicating Liquor and Fermented Malt | On-site                            |
| Class “B” and “Class C” Wine                | Fermented Malt and Wine                | On-site                            |
| Reserve “Class B” and Class “B”             | Intoxicating Liquor and Fermented Malt | On-site                            |
| Temporary Class “B” and Temporary “Class B” | Fermented Malt and Wine                | On-site                            |

*Table 3: License fees (maximum amount allowable by State Statute is being charged)*

| <b><u>Type of License</u></b>         | <b><u>License Fee</u></b> |
|---------------------------------------|---------------------------|
| “Class A” Intoxicating Liquor         | \$500.00                  |
| Class “A” Fermented Malt              | \$100.00                  |
| “Class A” Liquor: Cider Only          | No fee.                   |
| “Class B” Intoxicating Liquor         | \$500.00                  |
| Class “B” Fermented Malt              | \$100.00                  |
| “Class C” Wine Only                   | \$100.00                  |
| Reserve “Class B” Intoxicating Liquor | \$10,000 (one-time)       |
| Temporary Class “B” Fermented Malt    | \$10.00                   |
| Temporary “Class B” Wine              | \$10.00                   |

A combination Class A license (intoxicating liquor and fermented malt) would total \$600.00.

A combination Class B license (intoxicating liquor and fermented malt) would total \$600.00

Table 4: Existing Quotas (03/06/2026)

| <u>License</u>                | <u>Quota</u>              | <u>Licenses Issued</u> | <u>Licenses Available</u> |
|-------------------------------|---------------------------|------------------------|---------------------------|
| "Class A" Intoxicating Liquor | 16 - 1 per 750 residents  | 15                     | 1                         |
| Class "A" Fermented Malt      | 17 - 1 per 750 residents  | 16                     | 1                         |
| "Class B" Intoxicating Liquor | 25 - 1 per 500 residents  | 25                     | 0                         |
| RESERVE                       | 4 - \$10,000 one-time fee | 4                      | 1                         |
| "Class B" Intoxicating Liquor |                           |                        |                           |

**DISCUSSION**

The gas station at 303 S. Main Street has been operated by Kings Operating LLC as of March 5, 2026. An Alcohol License Application was submitted by Speedy 3, LLC dba Location 2 - 303 S. Main Street for use at 303 S. Main Street.

The following information was provided.

- Confirmation of Legal Name (corporation, limited liability company, partnership)
- Trade or Business Name
- Background check on Agent/Applicant
- Letter from King Operating WI LLC stating they will surrender the Class "A" Fermented Malt Beverage license contingent upon approval of applicant Hector Campechano Pucheta, Speedy 3, LLC dba Location 2 - 303 S. Main Street

The following items were verified.

- Verification of Federal Identification Number
- Verification of Wisconsin Seller's Permit Number

**FINANCIAL ANALYSIS**

Alcohol license fees for the submitted application is pro-rated from the month of issuance to expiration. Such Class A license from March to June is \$33.36.

**RECOMMENDATION**

The License Committee reviewed the application and recommended City Council approval at their March 9, 2026 meeting.

Staff recommends the approval of the Alcohol License Application for a Class "A" Fermented Malt Beverage License for Speedy 3, LLC dba Location 2 - 303 S. Main Street licensing period of March 18, 2026 to June 30, 2026 contingent upon all monies owed to the City are paid prior to license issuance by the City Clerk.

**ATTACHMENTS**

- 1. Speedy 3 LLC 303 S Main St - Alcohol License Application\_Redacted

Form  
**AB-200**

## Alcohol Beverage License Application

| For Municipal Use Only |
|------------------------|
| Municipality           |
| License Period         |

**License(s) Requested:** (up to two boxes may be checked)

- Class "A" Beer ..... \$ ✓     
  Class "B" Beer ..... \$ \_\_\_\_\_  
 "Class A" Liquor ..... \$ X     
  "Class B" Liquor ..... \$ \_\_\_\_\_  
 "Class A" Liquor (cider only) \$ \_\_\_\_\_     
  Reserve "Class B" Liquor \$ \_\_\_\_\_  
 "Class C" Liquor (wine only) \$ \_\_\_\_\_

| Fees                 |                 |
|----------------------|-----------------|
| License Fees         | \$ _____        |
| Background Check Fee | \$ _____        |
| Publication Fee      | \$ _____        |
| <b>Total Fees</b>    | <b>\$ _____</b> |

**Part A: Premises/Business Information**

|   |   |                                      |                         |
|---|---|--------------------------------------|-------------------------|
| 1. Legal Business Name (individual name if sole proprietorship)<br><b>Speedy 3 LLC</b>  |   |                                      |                         |
| 2. Business Trade Name or DBA<br><b>LOCATION 2 - 303 S MAIN ST FORT ATKINSON WI 53538-2240</b>  |   |                                      |                         |
| 3. FEIN<br><b>41-3655181</b>  | 4. Wisconsin Seller's Permit Number<br><b>456-1032247803-02</b>   |                                      |                         |
| 5. Entity Type (check one)<br><input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input checked="" type="checkbox"/> Limited Liability Company <input type="checkbox"/> Corporation <input type="checkbox"/> Nonprofit Organization  |   |                                      |                         |
| 6. State of Organization<br><b>Wisconsin</b>  | 7. Date of Organization<br><b>01/22/2026</b>  | 8. Wisconsin DFI Registration Number |                         |
| 9. Premises Address<br><b>303 S Main St</b>   |   |                                      |                         |
| 10. City<br><b>Fort Atkinson</b>  | 11. State<br><b>WI</b>  | 12. Zip Code<br><b>53538</b>         |                         |
| 13. County<br><b>0 Jefferson</b>  | 14. Governing Municipality: <input checked="" type="checkbox"/> City <input type="checkbox"/> Town <input type="checkbox"/> Village<br>of: <b>Fort Atkinson</b> |                                      | 15. Aldermanic District |
| 16. Premises Phone  | 17. Premises Email<br><b>[REDACTED]</b>   | 18. Website                          |                         |
| 19. Premises Description - Describe the building or buildings where alcohol beverages are produced, sold, stored, or consumed, and related records are kept. Describe all rooms within the building, including living quarters. Authorized alcohol beverage activities and storage of records may occur only on the premises described in this application. Attach a map or diagram and additional sheets if necessary.<br><i>Gas the cooler and Back Room.</i> |   |                                      |                         |
| 20. Mailing Address (if different from premises address)  |   |                                      |                         |
| 21. City  | 22. State   | 23. Zip Code                         |                         |

**Part B: Questions**

1. Has the business (sole proprietorship, partnership, limited liability company, or corporation) been convicted of violating federal or state laws or local ordinances? Exclude traffic offenses unless related to alcohol beverages.     Yes     No

If yes, list the details of violation below. Attach additional sheets if necessary.

|                        |          |   |
|------------------------|----------|---|
| Law/Ordinance Violated | Location | Trial Date  |
| Penalty Imposed        |          | Was sentence completed? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Law/Ordinance Violated | Location | Trial Date  |
| Penalty Imposed        |          | Was sentence completed? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |

2. Are charges for any offenses pending against the business? Exclude traffic offenses unless related to alcohol . . .  Yes  No beverages.

If yes, describe the nature and status of pending charges using the space below. Attach additional sheets as needed.

3. Is the applicant business or any of its officers, directors, members, agent, employees, owners, or other related individuals or entities a restricted investor with any interest in an alcohol beverage producer or distributor? . . .  Yes  No  
If yes, provide the name of the restricted investor and describe the nature of the interest.

4. Is the applicant business owned by another business entity? . . . . .  Yes  No  
If yes, provide the name(s) and FEIN(s) of the business entity owners below. Attach additional sheets as needed.

|                             |                          |
|-----------------------------|--------------------------|
| 4a. Name of Business Entity | 4b. Business Entity FEIN |
|-----------------------------|--------------------------|

5. Have the partners, agent, or sole proprietor satisfied the responsible beverage server training requirement for this license period? Submit proof of completion. . . . .  Yes  No

6. Is the applicant business indebted to any wholesaler beyond 15 days for beer or 30 days for liquor/wine? . . . . .  Yes  No

7. Does the applicant business owe past due municipal property taxes, assessments, or other fees? . . . . .  Yes  No

**Part C: Individual Information**

List the name, title, and phone number for each person or entity holding the following positions in the applicant business or businesses listed in Part B, Question 4: sole proprietor, all officers, directors, and agent of a corporation or nonprofit organization, all partners of a partnership, and all members, managers, and agent of a limited liability company. Attach additional sheets if necessary.

Include Form AB-100 for each person listed below. Corporations and LLCs must appoint an agent by including Form AB-101.

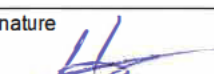
| Last Name          | First Name | Title   | Phone |
|--------------------|------------|---------|-------|
| Campechano Pucheta | Hector     | Partner |       |
| Elizabeth Pucheta  | Kayla      | Partner |       |
|                    |            |         |       |
|                    |            |         |       |

**Part D: Attestation**

One of the following must sign and attest to this application:

- sole proprietor
- one general partner of a partnership
- one corporate officer
- one member of an LLC

**READ CAREFULLY BEFORE SIGNING:** Under penalty of law, I have answered each of the above questions completely and truthfully. I agree that I am acting solely on behalf of the applicant business and not on behalf of any other individual or entity seeking the license. Further, I agree that the rights and responsibilities conferred by the license(s), if granted, will not be assigned to another individual or entity. I agree to operate this business according to the law, including but not limited to, purchasing alcohol beverages from state authorized wholesalers. I understand that lack of access to any portion of a licensed premises during inspection will be deemed a refusal to allow inspection. Such refusal is a misdemeanor and grounds for revocation of this license. I understand that any license issued contrary to Wis. Stat. Chapter 125 shall be void under penalty of state law. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000 if convicted.

|  |                     |                      |                  |      |
|--|---------------------|----------------------|------------------|------|
| Last Name<br>Campechano Pucheta  |                     | First Name<br>Hector |                  | M.I. |
| Title<br>Partner   | Email<br>[REDACTED] |                      | Phone            |      |
| Signature<br> |                     |                      | Date<br>02/13/26 |      |

**Part E: For Clerk Use Only**

|                                       |                |                      |   |
|---------------------------------------|----------------|----------------------|---|
| Date Application Was Filed With Clerk | License Number | Date License Granted | Date License Issued                             |
| Signature of Clerk/Deputy Clerk       |                |                      | Date Provisional License Issued (if applicable) |

# Alcohol Beverage Individual Questionnaire

All individuals involved in the alcohol beverage business must complete this form, including:

- sole proprietor
- all partners of a partnership
- all officers, directors, and agent of a corporation or nonprofit organization
- members and agent of a limited liability company

Your alcohol beverage application or renewal is not complete until all required Individual Questionnaires are submitted.

| Part A: Business Information   |  |
|--|--|
| 1. Legal Business Name (Individual name if sole proprietor)<br>Speedy 3 LLC  |  |
| 2. Business Trade Name or DBA<br>LOCATION 2 - 303 S MAIN ST FORT ATKINSON WI 53538-2240  |  |
| 3. Entity Type (check one)<br><input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input checked="" type="checkbox"/> Limited Liability Company <input type="checkbox"/> Corporation <input type="checkbox"/> Nonprofit Organization |  |

| Part B: Individual Information                    |  |                         |   |                                 |
|---|--|-------------------------|---|---------------------------------|
| 1. Last Name<br>Campechano Pucheta                |  | 2. First Name<br>Hector |   | 3. M.I.                         |
| 4. Relationship to Business (Title)<br>Partner    |  | 5. Email<br>[REDACTED]  |   | 6. Phone                        |
| 7. Home Address<br>[REDACTED]                     |  |                         |   |                                 |
| 8. City<br>[REDACTED]                             |  | 9. State<br>WI          | 10. Zip Code<br>[REDACTED]                                  | 11. Date of Birth<br>[REDACTED] |
| 12. Drivers License/State ID Number<br>[REDACTED] |  |                         | 13. Drivers License/State ID State of Issuance<br>Wisconsin |                                 |

| Part C: Address History  |        |       |        |       |        |          |   |                             |
|--|--------|-------|--------|-------|--------|----------|---|-----------------------------|
| 1. Do you currently live in Wisconsin? .....   |        |       |        |       |        |          | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| If yes, provide the month and year when you permanently moved to Wisconsin .....                                     |        |       |        |       |        |          | (MM/YYYY)                               |                             |
| 2. List in chronological order all of your addresses within the last 5 years. Attach additional sheets if necessary. |        |       |        |       |        |          |   |                             |
| Previous Address 1   |        | City  |        | State |        | Zip Code |   |                             |
| Previous Address 2   |        | City  |        | State |        | Zip Code |   |                             |
| Previous Address 3   |        | City  |        | State |        | Zip Code |   |                             |
| Previous Address 4   |        | City  |        | State |        | Zip Code |   |                             |
| Previous Address 5   |        | City  |        | State |        | Zip Code |   |                             |
| 3. List all states and counties you have lived in as an adult. Attach additional sheets if necessary.                |        |       |        |       |        |          |   |                             |
| State  | County | State | County | State | County | State    | County                                  |                             |
| State  | County | State | County | State | County | State    | County                                  |                             |

Continued →

**Part D: Criminal History**

1. Have you ever been convicted of any offenses (excluding traffic offenses unless related to alcohol beverages) for violation of any federal, Wisconsin, or another state's laws or of any county or municipal ordinances? . . . . .  Yes  No

If yes to question 1, please list details of each conviction below. Attach additional sheets as needed.

|                        |          |   |
|------------------------|----------|---|
| Law/Ordinance Violated | Location | Conviction Date   |
| Penalty Imposed        |          | Was sentence completed? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Law/Ordinance Violated | Location | Conviction Date   |
| Penalty Imposed        |          | Was sentence completed? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Law/Ordinance Violated | Location | Conviction Date   |
| Penalty Imposed        |          | Was sentence completed? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |

2. Are charges for any offenses currently pending against you (excluding traffic offenses unless related to alcohol beverages) for violation of any federal, Wisconsin, or another state's laws or any county or municipal ordinances? . . . . .  Yes  No

If yes to question 2, describe nature and status of pending charges using the space below. Attach additional sheets as needed.

**Part E: Attestation**

**READ CAREFULLY BEFORE SIGNING:** Under penalty of law, I have answered each of the above questions completely and truthfully. I certify that I am not prohibited from participating in this business due to any involvement in another tier of the alcohol beverage industry as a restricted investor. I understand that any license issued contrary to Wis. Stat. Chapter 125 shall be void under penalty of state law. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000 if convicted.

|   |                  |
|---|------------------|
| Signature<br> | Date<br>02/13/26 |
|---|------------------|

Form AB-101

Alcohol Beverage Appointment of Agent

Date 02/13/2026

**Agent Type (check one)**

Original (no fee)       Successor (\$10 fee for municipal licensees only)

**Part A: Business Information**

1. Legal Business Name (Individual name if sole proprietor)  
Speedy 3 LLC

2. Business Trade Name or DBA  
LOCATION 2 - 303 S MAIN ST FORT ATKINSON WI 53538-2240

3. Entity Type (check one)       Limited Liability Company       Corporation       Nonprofit Organization

4. Alcohol Beverage Business Authorization (check one)      5. If successor agent, provide State Permit or Municipal Retail License Number  
 Municipal Retail License       State Permit      456-1032247803-02

6. Describe the reason for appointing a successor agent, if successor is checked above.

**Part B: Agent Information**

1. Last Name      2. First Name      3. M.I.  
Campechano Pucheta      Hector

4. Email      5. Phone  
[Redacted]

6. Home Address  
[Redacted]

7. City      8. State      9. Zip Code      10. Date of Birth  
[Redacted]      WI      [Redacted]

11. Drivers License/State ID Number      12. Drivers License/State ID State of Issuance  
[Redacted]      Wisconsin

**Part C: Agent Questions**

1. Have you satisfied the responsible beverage server training requirement? .....  Yes     No  
Submit proof of completion.

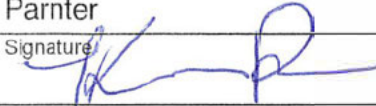
2. Have you completed Form AB-100, *Alcohol Beverage Individual Questionnaire* (licensee) or Form AB-300, *Alcohol Beverage Personal Questionnaire* (permittee)? .....  Yes     No

3. Have you been a Wisconsin resident for at least 90 continuous days? .....  Yes     No  
See instructions for exceptions.

Continued →


**Part D: Business Attestation**

READ CAREFULLY BEFORE SIGNING: I, the **Undersigned**, authorize the above-named individual to act for the above-named corporation, nonprofit organization, or limited liability company with full authority and control of the premises and of all alcohol beverage activities on such premises. I certify that I am authorized by the above-named entity to authorize this individual to act on behalf of the entity. If I am appointing a successor agent, I rescind all previous agent appointments for this premises. Further, I understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000 if convicted.

|   |                     |                     |      |
|---|---------------------|---------------------|------|
| Last Name<br>Elizabeth Pucheta  |                     | First Name<br>Kayla | M.I. |
| Title<br>Partner  | Email<br>[REDACTED] | Phone               |      |
| Signature<br> |                     | Date<br>2/13/26     |      |

**Part E: Agent Attestation**

READ CAREFULLY BEFORE SIGNING: I, the **Agent**, hereby accept this appointment as agent for the above-named corporation, nonprofit organization, or limited liability company and assume full responsibility for the conduct of all alcohol beverage activities on the premises for the above-named business. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000 if convicted.

|  |  |                      |      |
|--|--|----------------------|------|
| Last Name<br>Campechano Pucheta  |  | First Name<br>Hector | M.I. |
| Signature<br> |  | Date<br>02/13/26     |      |

**King Operating WI LLC**  
303 S Main St,  
Fort Atkinson, WI 53538

February 24, 2026

**City of Fort Atkinson,**  
City Council / Clerk's Office  
Fort Atkinson, WI

**Re: Surrender of Class A Liquor/Beer License #3/25-26**  
**Location:** 303 S Main St, Fort Atkinson, WI 53538

To Whom It May Concern,

This letter is to formally state that **King Operating WI LLC** will surrender **Class A**  
~~Liquor/Beer License #3/25-26~~ for the property located at **303 S Main St, Fort Atkinson, WI**  
**53538**, upon the **conditional granting of a liquor license to Speedy 3 LLC** by the Fort  
Atkinson, City Council.

This surrender shall become effective **only after** the City Council approves the issuance of the  
license to **Speedy 3 LLC**.

Please let us know if you require any additional documentation or information.

Thank you for your time and consideration.

Sincerely,

**King Operating WI LLC**

By: Adnan Maqbool

**Adnan Maqbool**  
Authorized Signer  
King Operating WI LLC

\*Not 'Liquor'



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Rebecca Houseman, City Manager

**RE:** Review and possible action on a proclamation recognizing April as Fair Housing Month in the City of Fort Atkinson (Houseman, City Manager)

---

### BACKGROUND

The month of April is celebrated as National Fair Housing Month. This year, the United States Department of Housing and Urban Development (HUD) is celebrating the 58<sup>th</sup> anniversary of the Fair Housing Act. This landmark law was signed into law on April 11, 1968, by President Lyndon B. Johnson. The Fair Housing Act prohibits housing discrimination because of race, color, religion, national origin, sex, disability, and family status. The Act furthers the beliefs advocated by Dr. Martin Luther King, Jr., and the other heroes of the Civil Right Movement.

### DISCUSSION

The attached Proclamation declares the City's support for fair housing initiatives and recognizes the benefits of a diverse and inclusive community. The Proclamation further declares April as Fair Housing Month in the City of Fort Atkinson.

### FINANCIAL ANALYSIS

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

### RECOMMENDATION

Staff recommends that the City Council adopt the Proclamation recognizing April 2026 as Fair Housing Month in the City of Fort Atkinson.

### ATTACHMENTS

1. Fair Housing Proclamation

**PROCLAMATION  
RECOGNIZING FAIR HOUSING MONTH  
IN THE CITY OF FORT ATKINSON**

**WHEREAS;** the Fair Housing Act, enacted on April 11, 1968, enshrined into federal law the goal of eliminating racial segregation and ending housing discrimination in the United State; and

**WHEREAS;** the Fair Housing Act prohibits discrimination in housing based on race, color, religion, sex, familial status, national origin, and disability, and commits recipients of federal funding to affirmatively further fair housing in their communities; and

**WHEREAS;** the City of Fort Atkinson is committed to the mission and intent of Congress to provide fair and equal housing opportunities for all; and

**WHEREAS;** our social fabric, the economy, health, and environment are strengthened in diverse, inclusive communities; and

**WHEREAS;** more than fifty years after the passage of the Fair Housing Act, discrimination persists, and many communities remain segregated; and

**WHEREAS;** acts of housing discrimination and barriers to equal housing opportunity are repugnant to a common sense of decency and fairness.

**NOW, THEREFORE, I,** Kyle Jaeckel, as City Council President of the City of Fort Atkinson, and my council colleagues, do hereby declare the month of April 2026 as

**FAIR HOUSING MONTH**

In the City of Fort Atkinson as an inclusive community committed to fair housing, and to promoting appropriate activities by private and public entities to provide and advocate for equal housing opportunities for all residents and prospective residents of the City of Fort Atkinson.

Proclaimed this 17th day of March in the year 2026.

\_\_\_\_\_  
**Kyle Jaeckel, City Council President**

Attest:

\_\_\_\_\_  
Michelle Ebbert, City Clerk/Treasurer/Finance Director



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Rebecca Houseman, City Manager

**RE:** Review and possible action relating to a Resolution Terminating Tax Incremental District #6 in the City of Fort Atkinson, Jefferson County, Wisconsin (Houseman, City Manager)

---

### BACKGROUND

The City Council created Tax Increment District (TID) #6 on January 18, 2000, as an industrial TID that covered the Klement Business Park. The TID was declared distressed in 2011, which allowed for successful TIDs #7 and #8 to donate their increment to pay down the debt in TID #6. Through focused efforts and patience, sufficient increment was collected from the 2024 tax roll to pay off the project costs and other obligations.

### DISCUSSION

The City Council held a TID Workshop on August 20, 2024, to discuss a plan for closing the City's three oldest TIDs: #6, #7, and #8. During the workshop, the City Council, staff, and the City's financial advisors from Baird discussed the opportunity to extend the lives of these TIDs to improve the City's housing stock through an affordable housing fund. Since that workshop, the City Council has extended the life of TID #8 to contribute to the AHF, extended the lives of TIDs #6 and #7 to support the same, and closed TID #8.

The City has received the attached reminder letter from the Wisconsin Department of Revenue (DOR) to close TIDs #6 and #7 by the April 15, 2026 deadline. The Resolution attached to this memo terminates the TID.

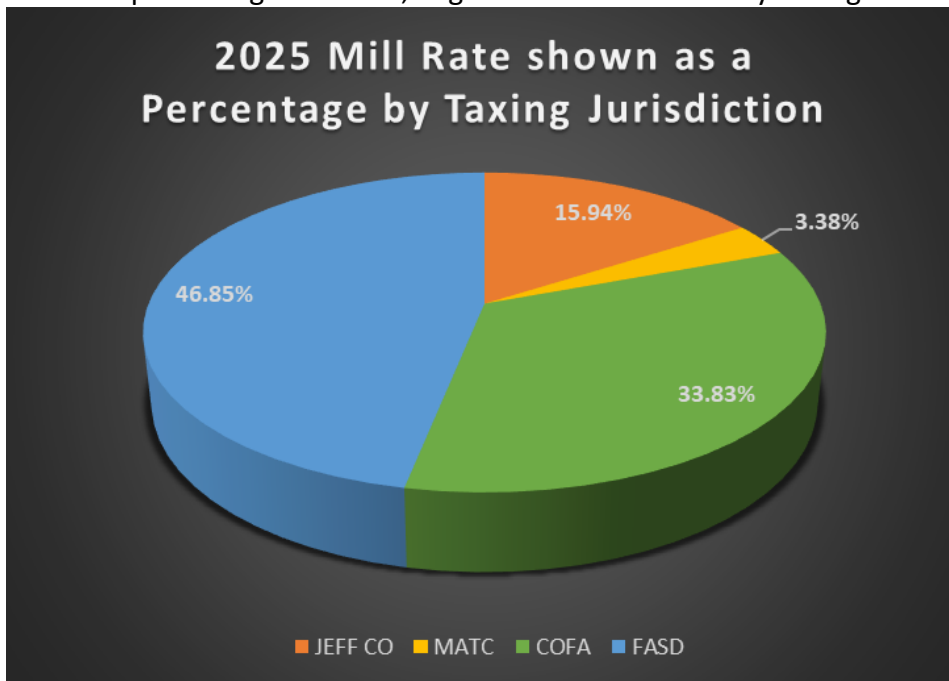
### FINANCIAL ANALYSIS

The termination of TID #6 will have a positive financial impact on all of the taxing jurisdictions within the City, especially the City of Fort Atkinson and the Fort Atkinson School District. The table below shows the projected additional annual revenue in the City's general fund in 2027 and beyond due to the termination of TID #6 and the increase in value on the general tax roll.

| City of Fort Atkinson Tax Increment District Closure Impacts |        |                  |                                   |
|--|--------|------------------|-----------------------------------|
| Revenue Projection for TID 6 Termination                     |        |                  |                                   |
|  | TID #6 |                  |                                   |
| Base Value   | \$     | 1,135,400.00     |                                   |
| 2025 Actual Value  | \$     | 9,400,200.00     |                                   |
| Increment Over Base  | \$     | 8,264,800.00     |                                   |
| 2025 Equalized Tax Rate per \$1000                           | \$     | 17.75            | <b>Total Revenue Impact on GF</b> |
| <b>Projected Tax Revenue 2027</b>                            | \$     | 146,700.20       | <b>2027 and Beyond</b>            |
| <b>COFA Portion*</b>   | \$     | <b>51,653.14</b> | \$ <b>51,653.14</b>               |
| FASD Portion*  | \$     | 68,288.94        |                                   |
| Jeff Co Portion*   | \$     | 21,961.02        |                                   |
| MATC Portion*  | \$     | 4,797.10         |                                   |

\*Proportions based on the percentage of 2025 total mill rate by taxing jurisdiction

2026 Adopted Budget: Chart 7, Page 18 - 2025 Mill Rate by Taxing Jurisdiction as a percentage



The table assumes that the value of the property within TID #6 will remain the same after the TID has been terminated. Using the 2025 equalized tax rate and the portions to each taxing jurisdiction based on the 2026 adopted budget, the City can expect to see an estimated \$51,653.14 in additional property tax revenue without increasing the mill rate.

Note that the City is responsible for commissioning and submitting a final audit for TID #6 to the DOR. Staff has requested that Baker Tilley provide an engagement proposal to complete such an audit within 12 months.

The closure of TID #6 will allow the City to create a new TID over the Klement Business Park as well as additional land in the area. A proposal to create a new TID over the undeveloped and underdeveloped land in this area is later on the agenda for Council review and possible action.

**RECOMMENDATION**

Staff recommends that the City Council adopt the Resolution Terminating TID #6 in the City of Fort Atkinson, Jefferson County, Wisconsin and direct the Clerk to file the appropriate paperwork with the Wisconsin Department of Revenue by April 15, 2026.

**ATTACHMENTS**

- 1. Resolution Terminating TID 6 3.17.26
- 2. Res 1438 TID 6 Extension for AHF
- 3. TIF Housing and Closure timeline COFA
- 4. ExtApproval-FortAtkinson-6-2025
- 5. MaxLifeLtr-FortAtkinson-6-2026

RESOLUTION NO. \_\_\_\_\_

**TAX INCREMENTAL DISTRICT (TID) TERMINATION RESOLUTION  
TERMINATING TID #6 IN THE CITY OF FORT ATKINSON, JEFFERSON COUNTY, WISCONSIN**

**WHEREAS**, the City Council of the City of Fort Atkinson created TID #6 on January 18, 2000, and adopted a project plan in the same year; and

**WHEREAS**, the City Council adopted Resolution No. 2025-1438 on August 19, 2025, which extended the life of TID #6 for 12 months, using the increment collected in 2026 from the 2025 tax roll to improve the City's housing stock (Affordable Housing Fund); and

**WHEREAS**, all TID #6 projects were completed in the prescribed allowed time; and

**WHEREAS**, sufficient increment was collected as of the 2024 tax roll, payable in 2025, to cover TID project costs.

**NOW, THEREFORE, BE IT RESOLVED**, that the City Council of the City of Fort Atkinson hereby terminates TID #6; and

**BE IT FURTHER RESOLVED**, that the City Clerk shall notify the Wisconsin Department of Revenue (DOR), within sixty (60) days of this resolution or prior to the deadline of April 15, 2026, whichever comes first, that the TID has been terminated; and

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

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

Adopted and this 17<sup>th</sup> day of March 2026.

Resolution introduced and adoption moved by Council Member \_\_\_\_\_.

Motion for adoption seconded by Council Member \_\_\_\_\_.

On roll call motion, passed by a vote of \_\_\_\_\_ ayes to \_\_\_\_\_ nays.

**CITY OF FORT ATKINSON**

---

**Kyle Jaeckel, Council President**

ATTEST:

---

Michelle Ebbert, City Clerk/Treasurer/Finance Director

RESOLUTION NO. 2025-1438

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

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

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

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

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

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

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

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

Adopted this 19<sup>th</sup> day of August 2025.

**City of Fort Atkinson City Council**

  
\_\_\_\_\_  
Kyle Jaekel, Council President

ATTEST:

  
\_\_\_\_\_  
Michelle Ebbert, Clerk/Treasurer/Finance Director

# City of Fort Atkinson

## *TID # 6-8 Affordable Housing Extension and Closure Timelines*



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



# State of Wisconsin • DEPARTMENT OF REVENUE

DIVISION OF STATE AND LOCAL FINANCE • OFFICE OF TECHNICAL & ASSESSMENT SERVICES • 2135 RIMROCK ROAD MADISON, WI 53713

**Mailing Address:**  
PO Box 8971 #6-97  
Madison, WI 53708-8971  
Phone: (608) 266-7750  
tif@wisconsin.gov

August 21, 2025

28-226

Michelle Ebbert  
Municipal Clerk/Treasurer  
101 N Main St  
Fort Atkinson, WI 53538-1861

RE: Extension Approval — City of Fort Atkinson TID 006

Dear Michelle Ebbert:

The Wisconsin Department of Revenue (DOR) approves your municipality's request to extend the life of Tax Incremental District (TID) 006. This approval extends the TID life to April 15, 2026.

DOR confirms your municipality followed the extension procedures, under state law (sec. 66.1105, Wis. Stats.); however, DOR does not review the facts or feasibility of the extension.

If you have questions, contact us at [tif@wisconsin.gov](mailto:tif@wisconsin.gov).

Sincerely,

*Tod Ericson*

Community Services Specialist  
Office of Technical and Assessment Services



# State of Wisconsin • DEPARTMENT OF REVENUE

DIVISION OF STATE AND LOCAL FINANCE • OFFICE OF TECHNICAL & ASSESSMENT SERVICES • MADISON, WI

**Mailing Address**  
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PO Box 8971 • MS 6-97  
Madison, WI 53708-8971  
Phone: (608) 266-7750  
tif@wisconsin.gov

January 29, 2026

28-226

Michelle Ebbert  
Municipal Clerk/Treasurer  
101 N Main St  
Fort Atkinson, WI 53538-1861

RE: Maximum Life — City of Fort Atkinson Tax Incremental District (TID) 006

Dear Michelle Ebbert:

The Wisconsin Department of Revenue (DOR) records show your municipality created TID 006 on January 18, 2000 and must terminate this TID by April 15, 2026.

**To terminate a TID, your municipality must:**

1. Adopt a termination resolution by April 15, 2026
2. Notify DOR within 60 days of the resolution or by April 15, whichever comes first
3. Email these documents to [tif@wisconsin.gov](mailto:tif@wisconsin.gov):
  - Adopted termination resolution
  - Completed Terminated TID Final Accounting Submission Date Agreement (Form PE-223)

If you have questions, contact us at [tif@wisconsin.gov](mailto:tif@wisconsin.gov).

Sincerely,

*Tod Ericson*

Community Services Specialist  
Office of Technical and Assessment Services



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Rebecca Houseman, City Manager

**RE:** Review and possible action relating to a Resolution Terminating Tax Incremental District #7 in the City of Fort Atkinson, Jefferson County, Wisconsin (Houseman, City Manager)

---

### BACKGROUND

Tax Increment District (TID) #7 was created as a blight elimination TID on January 18, 2000. 2022 was the last year to incur TID-related costs. Since 2011, TID #7 has been donating increment to TID #6 to pay off obligations. Through focused efforts and patience, TID #6 became solvent, which allows for both TIDs #6 and #7 to close.

### DISCUSSION

On August 19, 2025, the City Council adopted a Resolution extended the life of #7 for 12 months to support affordable housing efforts in the City of Fort Atkinson. The Wisconsin Department of Revenue has notified the City that this TID must be closed by April 15, 2026. The Resolution attached to this memo terminates the TID.

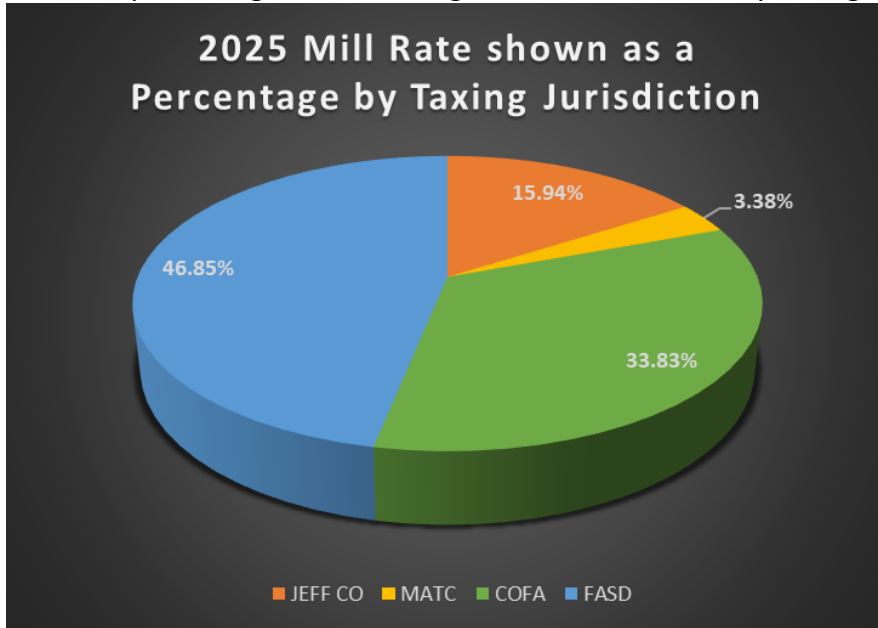
### FINANCIAL ANALYSIS

The termination of TID #7 will have a positive impact on all of the taxing jurisdictions within the City, especially the City of Fort Atkinson and the Fort Atkinson School District. The table below shows the projected additional annual revenue in the City's general fund in 2027 and beyond due to the termination of TID #7 and the increase in value on the general tax roll.

| City of Fort Atkinson Tax Increment District Closure Impacts |        |                   |                                   |
|--|--------|-------------------|-----------------------------------|
| Revenue Projection for TID 7 Termination                     |        |                   |                                   |
|  | TID #7 |                   |                                   |
| Base Value   | \$     | 11,239,400.00     |                                   |
| 2025 Actual Value  | \$     | 34,980,700.00     |                                   |
| Increment Over Base  | \$     | 23,741,300.00     |                                   |
| 2025 Equalized Tax Rate per \$1000                           | \$     | 17.75             | <b>Total Revenue Impact on GF</b> |
| <b>Projected Tax Revenue 2027</b>                            | \$     | 421,408.08        | <b>2027 and Beyond</b>            |
| <b>COFA Portion*</b>   | \$     | <b>148,377.78</b> | \$ <b>148,377.78</b>              |
| FASD Portion*  | \$     | 196,165.46        |                                   |
| Jeff Co Portion*   | \$     | 63,084.79         |                                   |
| MATC Portion*  | \$     | 13,780.04         |                                   |

\*Proportions based on the percentage of 2025 total mill rate by taxing jurisdiction

2026 Adopted Budget: Chart 7, Page 18 - 2025 Mill Rate by Taxing Jurisdiction as a percentage



The table assumes that the value of the property within TID #7 will remain the same after the TID has been terminated. Using the 2025 equalized tax rate and the portions to each taxing jurisdiction based on the 2026 adopted budget, the City can expect to see an estimated \$148,377.78 in additional property tax revenue without increasing the mill rate.

Note that the City is responsible for commissioning and submitting a final audit for TID #7 to the DOR. Staff has requested that Baker Tilly provide an engagement proposal to complete such audit within 12 months.

The closure of TID #7 will allow the City to create a new TID in its place. City staff will recommend creating two new TIDs over the undeveloped and underdeveloped land in the City's downtown and downtown periphery areas to support and encourage redevelopment opportunities and new private investment. Such proposals are later on the agenda for Council

review and possible action.

**RECOMMENDATION**

Staff recommends that the City Council adopt the Resolution Terminating TID #7 in the City of Fort Atkinson, Jefferson County, Wisconsin and direct the Clerk to file the appropriate paperwork with the Wisconsin Department of Revenue by April 15, 2026.

**ATTACHMENTS**

- 1. Resolution Terminating TID 7 3.17.26
- 2. Res 1489 TID 7 Extension for AHF
- 3. TIF Housing and Closure timeline COFA
- 4. ExtApproval-FortAtkinson-7-2025
- 5. MaxLifeLtr-FortAtkinson-7-2026

RESOLUTION NO. \_\_\_\_\_

**TAX INCREMENTAL DISTRICT (TID) TERMINATION RESOLUTION  
TERMINATING TID #7 IN THE CITY OF FORT ATKINSON, JEFFERSON COUNTY, WISCONSIN**

**WHEREAS**, the City Council of the City of Fort Atkinson created TID #7 on January 18, 2000, and adopted a project plan in the same year; and

**WHEREAS**, the City Council adopted Resolution No. 2025-1438 on August 19, 2025, which extended the life of TID #7 for 12 months, using the increment collected in 2026 from the 2025 tax roll to improve the City's housing stock (Affordable Housing Fund); and

**WHEREAS**, all TID #7 projects were completed in the prescribed allowed time; and

**WHEREAS**, sufficient increment was collected as of the 2024 tax roll, payable in 2025, to cover TID project costs.

**NOW, THEREFORE, BE IT RESOLVED**, that the City Council of the City of Fort Atkinson hereby terminates TID #7; and

**BE IT FURTHER RESOLVED**, that the City Clerk shall notify the Wisconsin Department of Revenue (DOR), within sixty (60) days of this resolution or prior to the deadline of April 15, 2026, whichever comes first, that the TID has been terminated; and

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

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

Adopted and this 17<sup>th</sup> day of March 2026.

Resolution introduced and adoption moved by Council Member \_\_\_\_\_.

Motion for adoption seconded by Council Member \_\_\_\_\_.

On roll call motion, passed by a vote of \_\_\_\_\_ ayes to \_\_\_\_\_ nays.

**CITY OF FORT ATKINSON**

---

**Kyle Jaeckel, Council President**

ATTEST:

---

Michelle Ebbert, City Clerk/Treasurer/Finance Director

RESOLUTION NO. 2025-1439

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

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

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

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

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

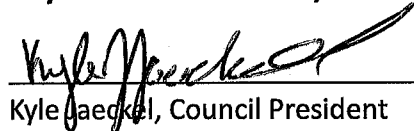
**NOW, THEREFORE, BE IT RESOLVED**, that the City of Fort Atkinson, Wisconsin, hereby extends the life of TID #7 for up to 12 months to use the final year's increment collected in 2026 from the 2025 tax roll to benefit affordable housing; and

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

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

Adopted this 19<sup>th</sup> day of August 2025.

City of Fort Atkinson City Council

  
\_\_\_\_\_  
Kyle Jaeckel, Council President

ATTEST:

  
\_\_\_\_\_  
Michelle Ebbert, Clerk/Treasurer/Finance Director

# City of Fort Atkinson

## *TID # 6-8 Affordable Housing Extension and Closure Timelines*



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



# State of Wisconsin • DEPARTMENT OF REVENUE

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Phone: (608) 266-7750  
tif@wisconsin.gov

August 21, 2025

28-226

Michelle Ebbert  
Municipal Clerk/Treasurer  
101 N Main St  
Fort Atkinson, WI 53538-1861

RE: Extension Approval — City of Fort Atkinson TID 007

Dear Michelle Ebbert:

The Wisconsin Department of Revenue (DOR) approves your municipality's request to extend the life of Tax Incremental District (TID) 007. This approval extends the TID life to April 15, 2026.

DOR confirms your municipality followed the extension procedures, under state law (sec. 66.1105, Wis. Stats.); however, DOR does not review the facts or feasibility of the extension.

If you have questions, contact us at [tif@wisconsin.gov](mailto:tif@wisconsin.gov).

Sincerely,

*Tod Ericson*

Community Services Specialist  
Office of Technical and Assessment Services



# State of Wisconsin • DEPARTMENT OF REVENUE

DIVISION OF STATE AND LOCAL FINANCE • OFFICE OF TECHNICAL & ASSESSMENT SERVICES • MADISON, WI

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PO Box 8971 • MS 6-97  
Madison, WI 53708-8971  
Phone: (608) 266-7750  
tif@wisconsin.gov

January 29, 2026

28-226

Michelle Ebbert  
Municipal Clerk/Treasurer  
101 N Main St  
Fort Atkinson, WI 53538-1861

RE: Maximum Life — City of Fort Atkinson Tax Incremental District (TID) 007

Dear Michelle Ebbert:

The Wisconsin Department of Revenue (DOR) records show your municipality created TID 007 on January 18, 2000 and must terminate this TID by April 15, 2026.

**To terminate a TID, your municipality must:**

1. Adopt a termination resolution by April 15, 2026
2. Notify DOR within 60 days of the resolution or by April 15, whichever comes first
3. Email these documents to [tif@wisconsin.gov](mailto:tif@wisconsin.gov):
  - Adopted termination resolution
  - Completed Terminated TID Final Accounting Submission Date Agreement (Form PE-223)

If you have questions, contact us at [tif@wisconsin.gov](mailto:tif@wisconsin.gov).

Sincerely,

*Tod Ericson*

Community Services Specialist  
Office of Technical and Assessment Services



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Jedidiah Draeger, Director of Neighborhood and Building Services

**RE:** First reading of an ordinance relating to a Zoning Map Amendment to change the zoning district for the property located on Mehta Lane (parcels 226-0614-3231-000 and 226-0614-3242-001) from Suburban Mixed Use (SMU) to Multi-Family Residential-12 (MRM-12) (Draeger, Director of Neighborhood and Building Services)

---

### BACKGROUND

The applicant is proposing a Zoning Map Amendment (ZMA) to rezone two vacant parcels in Fort Atkinson from Suburban Mixed Use (SMU) to Multi-Family Residential (MRM-12) to allow development of six apartment buildings with 12 units each (72 total units). If the ZMA is approved, the applicant plans to combine the parcels through a Certified Survey Map (CSM), apply for a Conditional Use Permit for a group development to allow multiple principal buildings on one lot, and complete site plan review for the project details.

The properties are located at the west end of Mehta Lane on the northwest side of Fort Atkinson near the USH 26 bypass and are currently vacant. Nearby land uses include commercial development near Madison Street, apartments to the east, and wetlands, residential neighborhoods, and the Crown of Life Christian Academy to the south. The future land use designation in the City's Comprehensive Plan for these parcels is Planned Mixed Use, which allows multifamily housing, making the proposal consistent with the plan. Prior to further approvals, the applicant will complete a new wetland delineation to establish updated wetland boundaries and determine the site's developable area.

### DISCUSSION

At the meeting on March 10, 2026, the Plan Commission reviewed this matter and recommended that the City Council adopt an Ordinance changing the zoning of the properties to MRM-12 to support the proposed project. A concept plan for the project was presented at the February 10th Plan Commission meeting and received support.

### FINANCIAL ANALYSIS

The proposed rezoning would allow development of six multifamily apartment buildings totaling 72 units on currently vacant land. The project would convert undeveloped land that currently generates minimal tax revenue into a higher-value residential property, increasing the overall property tax base. The project may also produce one-time revenues through building permits, plan review fees, and utility connection charges.

Overall, the proposed Zoning Map Amendment meets the requirements of the City’s ordinances, is in alignment with adopted City plans, and will provide additional tax base and housing units when the project is complete and is located within Tax Incremental District (#9).

**RECOMMENDATION**

City staff recommend that the City Council perform the first reading of this ordinance and direct the City Manager to prepare the Ordinance for a second reading.

**ATTACHMENTS**

- 1. Plan Commission Memorandum ZMA Mehta Lane
- 2. Updated Written Description - 2-24-26
- 3. Northwest Quadrant Planning Area
- 4. Future Land Use Map 1



## ZONING MAP AMENDMENT REPORT TO THE PLAN COMMISSION

**DATE:** March 10, 2026

**PROPERTY ADDRESS:** NA

**PARCEL NUMBER:** 226-0614-3231-000 and 226-0614-3242-001

**OWNER:** CBF Investment CO, LLC

**APPLICANT:** Premier Real Estate Management, LLC  
(Emily McFarland)

**FILE NUMBER:** ZMA-2026-01

**EXISTING ZONING:** SMU, Suburban Mixed Use

**REQUESTED ZONING:** MRM-12, Multi-Family Residential

**EXISTING LAND USE:** Vacant

**REQUESTED USES:** Multi-family residential

---

### BACKGROUND

Section 15.10.31 of the City of Fort Atkinson Zoning Ordinance outlines the requirements for a Zoning Map Amendment process. This requires a public hearing, review, and approval by the Plan Commission and the City Council on the consistency of the proposal with adopted plans.

---

### REQUEST OVERVIEW



The proposed project involves a Zoning Map Amendment for two existing parcels from Suburban Mixed Use (SMU) to Multi-Family Residential (MRM-12) to facilitate the future development of six multi-family apartment buildings with 12 units in each. Pending the proposed amendment, the applicant has indicated that they will seek a certified survey map to combine the two existing parcels; a conditional use permit for a group development to allow multiple principal buildings on the same lot; and site plan review for the details associated with the project.

The subject properties are located on the far northwest side of Fort Atkinson, adjacent to the USH 26 bypass. The parcels are vacant and not currently addressed. They are located at the western terminus of Mehta Lane. Existing land uses in the area include commercial near Madison Street, senior and market rate apartments to the east, and a combination of wetlands, mixed residential neighborhoods, and the Crown of Life Christen Academy to the south.

The parcels are identified as Planned Mixed Use within the Comprehensive Plan. This land use designation includes commercial, multifamily, and mixed-use buildings. The proposed Zoning Map Amendment is consistent with this designation.

The applicant will conduct a new wetland delineation prior to seeking CSM, Group Development, and Site Plan approvals. The new delineation will provide updated wetland boundaries and setback requirements to indicate the developable area of the subject properties.

**REZONING REVIEW:**

The existing properties are currently zoned SMU. This zoning district allows for a mix of commercial land uses and mixed-use buildings. The Comprehensive Plan identifies the properties as Planned Mixed Use on the Future Land Use Map. The consistency between the proposed rezoning and the Comprehensive Plan is further described below.

The parcels must meet the minimum standards of the MRM-12 zoning district to accommodate the proposed rezoning. All proposed land uses and structures must also meet the minimum standards of each district and will be reviewed in detail associated with future required steps prior to development.

The minimum lot dimensions will be met for each parcel, as shown below:

**Parcel 226-0614-3231-000 (western parcel)**

| Bulk Regulation              | MRM-12 Standard | Parcel Dimensions       |
|------------------------------|-----------------|-------------------------|
| Minimum Lot Area             | 20,000 sf       | 349,278 sf (8.02 acres) |
| Minimum Lot Width            | 100 feet        | >100 feet               |
| Minimum Lot Depth            | 120 feet        | >120 feet               |
| Minimum Lot Frontage at ROW* | 50 feet         | 0 feet                  |

\*The existing western parcel does not currently have any accessible right-of-way frontage. It does share a boundary with the USH 26 Bypass, but no access is permitted per WisDOT standards. The parcel was created without accessible right-of-way frontage, which does not conform to the current zoning and subdivision ordinances. However, the applicant plans to

remediate this nonconformity through a future CSM combining the two subject parcels and providing the required lot frontage at the right-of-way.

**Parcel 226-0614-3242-001 (eastern parcel)**

| Bulk Regulation             | MRM-12 Standard | Parcel Dimensions       |
|-----------------------------|-----------------|-------------------------|
| Minimum Lot Area            | 20,000 sf       | 141,165 sf (3.24 acres) |
| Minimum Lot Width           | 100 feet        | >100 feet               |
| Minimum Lot Depth           | 120 feet        | >120 feet               |
| Minimum Lot Frontage at ROW | 50 feet         | 120 feet                |

**ZONING MAP AMENDMENT CRITERIA:**

A Zoning Map Amendment must be reviewed per the requirements of Section 15.10.31(4)(b) of the Zoning Ordinance. City Staff is required to provide a written report regarding this review to assist the Plan Commission and Common Council in reviewing the proposed amendment.

1. Does the proposed Zoning Map Amendment advance the purposes of the Zoning Ordinance as outlined in Section 15.01.03? Yes. The proposed zoning map amendment protects the health, safety, morals, comfort, convenience, and general welfare of the public. This will be accomplished through consistency with neighboring land use patterns and advancement of community goals within adopted plans.
2. Is the proposed Zoning Map Amendment in harmony with the Comprehensive Plan? Yes. The proposed zoning map amendment helps accomplish many of the community's goals as identified in the Comprehensive Plan and is consistent with the Planned Mixed Use designation on the Future Land Use Map.
3. Does the proposed Zoning Map Amendment maintain the desired consistency of land uses, land use intensities, and land use impacts within the pertinent Zoning District? Yes. The proposed zoning map amendment is consistent with the Comprehensive Plan and the intended uses are consistent with adjacent land use patterns to the east (senior and market rate apartments).
4. Does the proposed Zoning Map Amendment address any factors that are not accomplished on the current Zoning Map?
  1. The designations of the Zoning Map are not in conformance with the Comprehensive Plan. N/A
  2. A mapping mistake was made. N/A
  3. Factors have changed such as new data, infrastructure, market conditions, development, annexation, or other zoning changes that make the subject property more appropriate for a different zoning district. Yes. The proposed zoning map amendment allows for the creation of additional housing units

within the City of Fort Atkinson in reflection of the well-documented housing shortage in the community.

4. Growth patterns or rates have changed, creating the need for an amendment to the Zoning Map. Yes. There is a well-documented shortage of housing in Fort Atkinson and across Wisconsin that necessitates additional housing opportunities within the community, which is consistent with the proposed amendment.

**PUBLIC NOTICE:**

A public hearing is required for Zoning Map Amendment review and action. All required public hearing notices have been properly posted in compliance with state law.

**COMPREHENSIVE LAND USE PLAN (2019):**

The subject parcels are located within the Northwest Quadrant Planning Area (see attachments) and are identified as community commercial and environmental corridor. Some of the opportunities identified in this area include enhanced marketability due to location near highways, creation of a community gateway experience, traditional neighborhood and sustainable design, neighborhood connections across Highway 26, capitalizing on existing businesses and schools, and urban mixed-use development and redevelopment opportunities.

The subject parcels are also shown as Planned Mixed Use and Environmental Corridor on the Future Land Use Map. The Planned Mixed Use designation includes a mix of commercial and residential uses, including Multi-Family Residential. The Environmental Corridor designation includes open space areas comprised of known sensitive natural resources that require additional, detailed on-site investigation to determine their boundaries and appropriate setbacks. Staff believes the proposal is in concert with the Comprehensive Plan.

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**DISCUSSION**

The applicant has worked with City staff to develop the proposed project. The City's Management Team has reviewed the application and all comments have been included within this document.

The proposed Zoning Map Amendment aims to provide an additional housing development opportunity on the subject properties. This location comprises a mix of different land uses that includes multi-family development directly to the east. However, the amendment still continues to maintain the character and appropriate scale of development within the surrounding neighborhood.

Overall, the proposed Zoning Map Amendment meets the requirements of the City's ordinances, is in alignment with adopted City plans, and will provide additional tax base and housing units when the project is complete. The parcels are located within a Tax Incrementation District (#9).

---

**RECOMMENDATION**

City staff recommends that the Plan Commission recommend the City Council approve

the Zoning Map Amendment from SMU to MRM-12 for the subject parcels.

Note that the following land use applications are expected for this project, which will require future Plan Commission and/or City Council review and approval:

- A certified survey map combining the two parcels into one to gain right-of-way accessibility conformance with the Zoning Ordinance.
- A conditional use permit for a group development.
- Site, landscape, stormwater, and building material review through the Site Plan Review process.

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**ATTACHMENTS**

1. Updated Written Description - 2-24-26
2. Northwest Quadrant Planning Area
3. Future Land Use Map 1

City of Fort Atkinson

Written Description for Site Plan

Parcels 226-0641-3231-000 and 226-0614-3242-001

Parcel **226-0614-3231-000**

NE1/4 SW1/4. EX PT NW OF STH 26. EX 9.8A IN STH 26 IN DOC 910339. EX PT LYG S OF SD L: COM S1/4/C, S89DG43'E 164.99 FT, N01DG30'W 1780.23FT, N75 DG42'W 904.79FT TO ELY L STH 26 BYPASS.

Parcel **226-0614-3242-001**

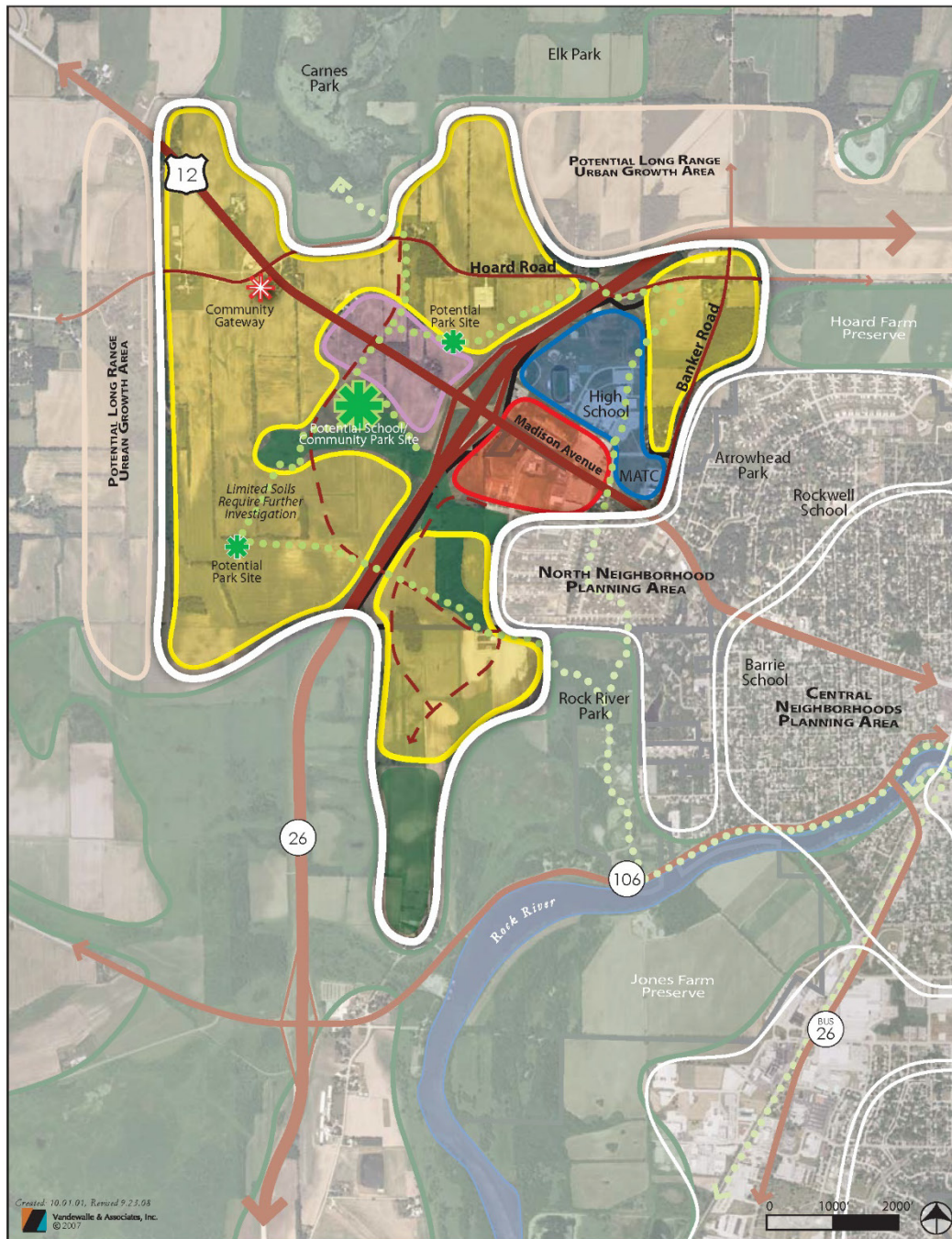
W5A OF NW1/4 SE1/4. EX PT LYG S OF SD L: COM S1/4/C, S89DG43'E 164.99FT, N01DG30' W 1780.23FT, N75DG42'W 904. 79FT TO ELY L STH 26 BYPASS. EX COM W1/4/C, S89DG48'E 2613.44FT, S89DG58'E 107.43 FT TO POB, S89DG58'E 58.27FT S01DG28'E 59.08FT, S75DG05'E 27.77FT, N82DG49'W 49.69FT, N89DG58'W 37.36FT, N00DG01'E 60FT TO POB.

Both properties are currently zoned Suburban Mixed Use (SMU), which does not permit standalone multi-family residential buildings without a commercial component. As a result, rezoning will be required. We would like to rezone the property to Multi-Residential-12 (MRM-12). This district allows up to twenty dwelling units per acre, which aligns with our proposed density. Additionally, an adjacent property already zoned MRM-12. The City's Comprehensive Plan also supports the MRM-12 Zoning as well. The attached site plan shows our typical 12-unit buildings, with each unit including two bedrooms, two bathrooms, an attached garage, and a private entrance. Depending upon the unit, each is roughly between 1,050, and 1,150 square feet. There is also an office space and a mail pickup location for the tenants as well. For employees, there will be 1 full time (property manager) and possibly 2 part time employees for maintenance and housekeeping.

# NORTHWEST QUADRANT PLANNING AREA

FIGURE: 2.12

CITY OF FORT ATKINSON  
FUTURES OPEN HOUSE



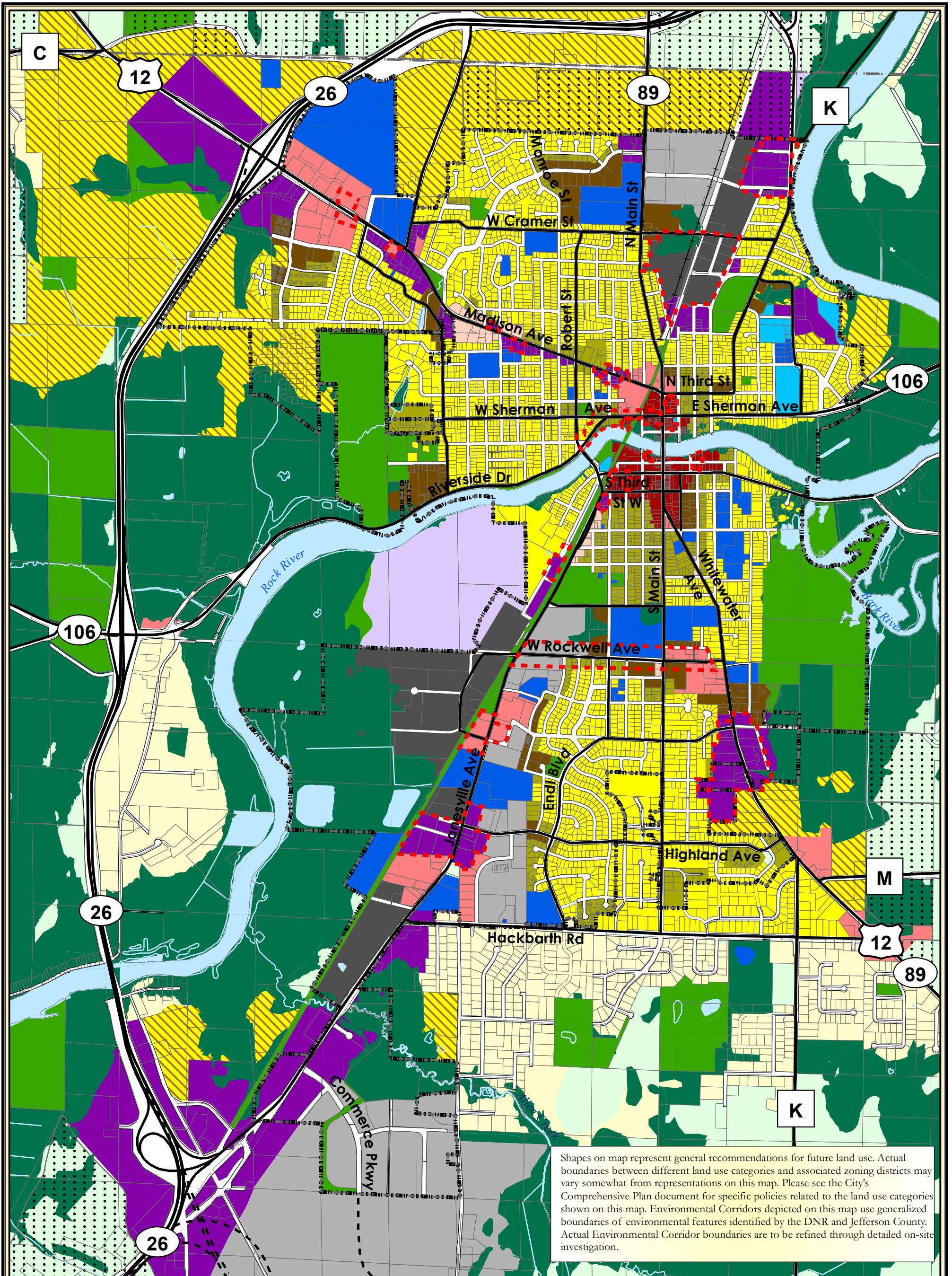
## Opportunities

- Proximity to Madison enhances marketability
- Community gateway experience
- Traditional neighborhood & sustainable design
- Neighborhoods connected across Highway 26
- Capitalize on existing businesses & schools
- Urban mixed use development & redevelopment opportunities

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

## Conceptual Land Uses

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



**City of Fort Atkinson  
Comprehensive Plan**

**Map 7: Future Land Use - City View**

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

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

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

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

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



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



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Jedidiah Draeger, Director of Neighborhood and Building Services

**RE:** First reading of an ordinance relating to a Zoning Map Amendment for the property located at 23 N. Water St. E. and the westerly adjacent vacant lot (parcels 226-0514-0322-008 and 226-0514-0322-009), to change the zoning from Downtown Historic Mixed Use (DHMU) to Downtown Historic Mixed Use with a Planned Unit Development Overlay (Draeger, Director of Neighborhood and Building Services)

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### BACKGROUND

Premier Bank owns two parcels between Main Street and Edward Street with frontage on N. Water Street East in the City of Fort Atkinson. One parcel is a gravel parking lot, and the other contains a vacant former auto alignment shop. The applicant proposes demolishing the existing building and combining the parcels to develop a paved, 15-stall off-site parking lot to support Premier Bank staff and customers.

The new lot would replace parking currently used through a private agreement with the neighboring Bienfang's Bar property, which may not be available long-term. A parking study found the proposed lot would help reduce peak parking demand in nearby public downtown spaces. The applicant is currently seeking Plan Commission review of the General Development Plan (GDP), the first step in the Planned Unit Development (PUD) process, with a Specific Implementation Plan and Certified Survey Map (CSM) to combine the lots expected at a later stage.

### DISCUSSION

The proposed General Development Plan (GDP) identifies nine areas of flexibility from the standards of the DHMU zoning district, each related to the proposed off-site parking lot and the physical constraints typical of downtown development in Fort Atkinson. Off-site parking lots were intentionally not permitted as a standalone principal use in the DHMU district to prioritize preservation and reuse of existing structures and limit large surface parking lots in the downtown core. However, the applicant has provided additional context through a parking analysis and a multi-year collaboration with City staff to address documented parking

deficiencies, redevelop an underutilized property, and improve utilities in the area.

City staff and Premier Bank have worked together to develop a proposal that balances the intent of the zoning ordinance with site constraints while supporting broader city goals. The property's location one block off of Main Street helps minimize impacts on the historic streetscape while supporting downtown activity and reducing demand for shared and on-street parking.

Based on these factors, City staff supports the proposal due to its potential to improve infrastructure, address safety concerns, and assist with the long-term coordination of downtown redevelopment.

At the meeting on March 10, 2026, the Plan Commission reviewed this matter and recommended that the City Council adopt an Ordinance changing the zoning of the property.

### **FINANCIAL ANALYSIS**

There will be a minor reduction in the tax base associated with the deconstruction of the existing building. However, the structure is currently dilapidated and carries a relatively low assessed value. In addition, the project provides an opportunity to facilitate the reconstruction of an aging sewer main that has reached the end of its service life and is currently located beneath private property without adequate access for maintenance or repair. This improvement will enhance long-term infrastructure reliability and address a maintenance constraint for the City.

### **RECOMMENDATION**

City Staff recommend the City Council perform the first reading of the ordinance and direct the City Manager to prepare the ordinance for a second reading at the meeting on April 9, 2026.

### **ATTACHMENTS**

1. Plan Commission Memo 23 N. Water St.
2. PBP-DRAWINGS Rev 2 11x17 2-5-26
3. Premier Bank Documents



## General Development Plan REPORT TO THE PLAN COMMISSION

**DATE:** March 10, 2026

**PROPERTY ADDRESS:** 23 N. Water Street and the westerly adjacent vacant lot

**PARCEL NUMBER:** 226-0514-0322-008 and 226-0514-0322-009

**OWNER:** Premier Bank

**APPLICANT:** Premier Bank

**FILE NUMBER:** PUD-2025-03

**EXISTING ZONING:** DHMU, Downtown Historic Mixed Use

**PROPOSED ZONING:** DHMU, with Planned Unit Development Overlay

**EXISTING LAND USE:** Parking lot and vacant building

**REQUESTED USES:** Off-site parking lot

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### BACKGROUND

#### **Planned Unit Development - GDP REVIEW: Section 15.10.44**

Section 15.02.81 of the City of Fort Atkinson Zoning Ordinance outlines the purpose, intent, potential zoning flexibilities, and applicability associated with a PUD. Additionally, Section 15.10.44 of the Zoning Ordinance outlines the procedural steps associated with a PUD. This requires a two-step process: 1) General Development Plan (GDP) to establish the new customized zoning requirements for the property and 2) Specific Implementation Plan (SIP) to review the details of the project associated with the Site Plan. Both must be acted upon by the Plan Commission and/or City Council for approval in reflection of defined criteria as listed within the ordinance.

A Planned Unit Development (PUD) allows a municipality to provide flexibility from certain zoning and design standards in order to accommodate unique site conditions or development proposals that may not fit within the City's zoning regulations. In exchange for this flexibility, the PUD process allows the City to review the project comprehensively to ensure the overall development remains consistent with community planning goals and provides an appropriate site design.

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### REQUEST OVERVIEW

Premier Bank owns two parcels of land located between Main Street and Edward Street, with frontage along N. Water Street East. One of these parcels is a gravel parking lot, while the other contains a vacant building that was previously used as an auto alignment shop.



The applicant is proposing to demolish the existing building on the eastern parcel and combine the two parcels into a single lot to develop a 15-stall off-site parking lot. This new parking lot would provide additional spaces for bank staff and customers, helping meet parking needs as part of the bank’s ongoing development. Currently, Premier Bank has an agreement with the adjacent Bienfang’s Bar property for staff parking. However, this arrangement may not continue in the future, as the parking area is privately owned and access is not guaranteed long-term. In response, the proposed parking lot will serve as a replacement for the current parking spaces, ensuring long-term, dedicated parking for the bank. To assess the need for parking, the applicant conducted a parking study for the immediate area, which concluded that the proposed lot would help reduce peak parking occupancy in surrounding public parking areas in the downtown area.

Today, the applicant is seeking Plan Commission review of the General Development Plan (GDP), which is the first step (zoning) in the Planned Unit Development (PUD) approval process. The second step (Specific Implementation Plan), which will include a CSM to combine the lots, will come before the Plan Commission for consideration at a later date, pending the outcome of today’s agenda items.

**PUBLIC NOTICE:**

A public hearing is required for Zoning Map Amendment review and action. All required public hearing notices have been properly posted in compliance with state law.

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**DISCUSSION**

**Certified Survey Map (CSM) REVIEW:**

The applicant is not seeking CSM review and action today, but it is important to consider the requirements while considering approval of the GDP. A future Certified Survey Map is planned to combine two existing parcels into one. The Land Division and Development Code requires that the CSM be reviewed by the Plan Commission for consistency with all other ordinances, laws, rules, regulations, and plans. The Zoning Ordinance has minimum and maximum density, intensity, and bulk regulations for all properties in the City. As further described below, the new

parcel proposed to be created via the CSM must meet the minimum standards for the DHMU zoning district.

Minimum lot dimensions must be met, as shown below:

| Bulk Regulation             | DHMU Standard | Proposed New Parcel |
|-----------------------------|---------------|---------------------|
| Minimum Lot Area            | 3,000 sf      | 5,051 sf            |
| Minimum Lot Width           | None          | 84 feet             |
| Minimum Lot Depth           | None          | 60 feet             |
| Minimum Lot Frontage at ROW | None          | 84 feet             |

**GENERAL DEVELOPMENT PLAN (GDP) REVIEW:**

The property will utilize the DHMU zoning district as the underlying requirements. The DHMU district does not currently permit principal Off-Site Parking Lots as a permitted land use. Through the proposed GDP rezoning, the underlying DHMU zoning district will remain in place and this GDP will indicate all requested flexibilities or deviations from that zoning district.

Per Section 15.03.18(6), the Off-Site Parking Lot land use requires the following:

- Access and vehicular circulation shall be designed so as to discourage cut-through traffic = Met (the proposed interconnected surface parking lots may facilitate some cut-through traffic, but volumes will most likely be very low given site constraints, a small number of parking spaces, and tighter traffic circulation areas between the two lots in this downtown setting)

The DHMU zoning district’s bulk dimensions must also be met as shown below:

| Requirement Type                  | Requirement                          | Proposed                            |
|-----------------------------------|--------------------------------------|-------------------------------------|
| Min. Lot Area                     | 3,000 sf                             | 5,051 sf                            |
| Max. Impervious Surface Area      | 100%                                 | 85%                                 |
| Max. Building Coverage            | 90%                                  | 0%                                  |
| Min. Lot Width                    | None                                 | 84 feet                             |
| Min. Lot Depth                    | None                                 | 60 feet                             |
| Min. Lot Frontage at ROW          | None                                 | 84 feet                             |
| Min. Front or Street Side Setback | 0 or 10 feet                         | N/A (no building)                   |
| Min. Side Yard Setback            | 0 feet                               | N/A (no building)                   |
| Min. Rear Yard Setback            | 10 feet                              | N/A (no building)                   |
| Max. Building Height              | 50 feet                              | N/A (no building)                   |
| Min. Pavement Setback             | Rear/Side: 5 feet<br>Street: 10 feet | Rear: 7 feet<br>Side: <b>0 feet</b> |

**GDP FLEXIBILITIES REQUESTED:**

The proposed GDP identifies the following items of flexibility from the standards of the DHMU zoning district:

1. The **Permitted Principal Uses** established in Section 15.02.34 of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, an Off-Site Parking Lot is not a permitted principal land use in the DHMU zoning district. The proposed development includes an Off-Site Parking Lot as a principal land use on the site.
2. The **Minimum Pavement Setback** established in Section 15.02.34(7) of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, a minimum of 10 feet is required for pavement adjacent to the street and 5 feet is required for pavement adjacent to side or rear property lines. The proposed development includes a minimum pavement setback of 0 feet on the side property lines and 4 feet on the street facing property line.
3. The **Maximum Number of Access Points** established in Section 15.06.03(5) of the Zoning Ordinance will not be met by this proposal.
  1. Specially, only one access point is permitted to any lot less than 200 feet in width. The proposed development includes two access points on a property that's only 84 feet wide.
4. The **Minimum Number of Bicycle and Pedestrian Connections** in Section 15.06.04 of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, a minimum of one 5-foot-wide pedestrian and bicycle access point is required from at least one street frontage. The proposed development does not include any pedestrian and bicycle access points.
5. The **Minimum Vision Triangle Standards** in Section 15.06.05 of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, a minimum 10-foot vision triangle clearance is required between driveways and the public right-of-way. The proposed development includes a vision triangle clearance of less than 10 feet.
6. The **Minimum Green Space Area for Parking Lots** established in Section 15.06.06(9) of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, a minimum 10-foot green area along all street frontages and interior lot lines shall be required from on-site parking lot areas and a minimum 10-foot green area between abutting off-street parking areas on neighboring properties shall be required. The proposed development includes a 7-foot green area along the northern property line, 4-foot green area along the southern property line, and 0-foot green area along the eastern and western property lines.
7. The **Minimum Permitted Throat Length** established in Section 15.06.06(j) of the Zoning Ordinance will not be met by this proposal

1. Specifically, for parking lots of 6 or more stalls, the minimum throat length required is 25 feet. The proposed development includes 15 parking stalls with a 4-foot throat length (15 feet from the curb).
8. The **Minimum Aisle Width for Two-Way Traffic Flow** established in Section 15.06.06(15) of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, the minimum aisle width for two-way traffic flow is required to be 24 feet. The proposed development includes a 6-foot aisle width along the western property line (total of 14 feet if adjacent private property is included in that measurement).
9. The **Maximum Footcandles at the Property Line** established in Section 15.06.20 of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, the minimum foot candles permitted at the property line is 1.0. The proposed development (if it includes exterior lighting which is currently unknown given the plans provided) would not be able to meet this requirement given the site layout and connections to adjacent existing parking areas.

#### **ZONING MAP AMENDMENT (GDP) FINDINGS:**

A Zoning Map Amendment must be reviewed per the requirements of Section 15.10.31(4)(b) of the Zoning Ordinance. City Staff is required to provide a written report regarding this review to assist the Plan Commission and Common Council in reviewing the proposed amendment.

1. Does the proposed Zoning Map Amendment advance the purposes of the Zoning Ordinance as outlined in Section 15.01.03? Yes. The proposed zoning map amendment protects the health, safety, morals, comfort, convenience, and general welfare of the public. This will be accomplished through consistency with the neighboring land uses and assisting the long-term parking needs of downtown businesses.
2. Is the proposed Zoning Map Amendment in harmony with the Comprehensive Plan? Yes. The proposed zoning map amendment is consistent with the Downtown designation on the Future Land Use Map and several of the plan's stated goals for economic development, utilities and community facilities, and land use.
3. Does the proposed Zoning Map Amendment maintain the desired consistency of land uses, land use intensities, and land use impacts within the pertinent Zoning District? Yes. The proposed zoning map amendment is consistent with adjacent land use patterns that includes off-street surface parking lots to support downtown businesses.
4. Does the proposed Zoning Map Amendment address any of factors that are not accomplished on the current Zoning Map?
  1. The designations of the Zoning Map are not in conformance with the Comprehensive Plan. N/A
  2. A mapping mistake was made. N/A
  3. Factors have changed such as new data, infrastructure, market conditions, development, annexation, or other zoning changes that make the subject property more appropriate for a different zoning district. Yes. The proposed

zoning map amendment allows for the creation of additional parking spaces in the downtown area to support local businesses and assist in meeting the unmet demand for parking as documented within the applicant's parking study.

4. Growth patterns or rates have changed, creating the need for an amendment to the Zoning Map. N/A

#### **OVERVIEW OF SPECIFIC IMPLEMENTATION PLAN (SIP)**

The applicant is not seeking SIP review and action today, but it is important to consider the proposed development plan details as part of this GDP review:

- The proposed off-site parking lot is situated directly across the street from Premier Bank's existing on-site parking lot. Pedestrians could use one of two nearby intersections to safely cross N. Water Street East or an additional pedestrian mid-block crossing could be added to assist in facilitating safe pedestrian movements.
- The western access point looks to align with Premier Bank's existing on-site parking lot access point to the south.
- The proposed off-site parking lot area is currently interconnected between several other adjacent properties. The applicant will need to secure cross-access easements between each of the neighboring properties to ensure connectivity and accessibility.
- The proposed development will improve the aesthetic look and overall functionality of the area by increasing the green space between the two existing sites by 763 square feet (15% increase from today), reconstructing the pavement, removing the dilapidated structure, and improving utility infrastructure in the area.
- The applicant has engaged in discussions with the City and neighboring properties regarding private storm sewer upgrades.
- The applicant has agreed to allow an easement for the replacement of an 8-inch clay sanitary sewer line, which has recently encountered issues. This line runs north to south behind and beneath the Main Street buildings on the east side of N. Main Street, extending beyond the private property boundaries.

#### **PUD APPROVAL CRITERIA:**

The Plan Commission must make a finding with respect to the following criteria:

- The proposed planned unit development project is consistent with the overall purpose and intent of this chapter = Met
- The proposed planned unit development project is consistent with the City's Comprehensive Plan and other area plans = Met
- The proposed planned unit development project would maintain the desired relationships between land uses, land use densities and intensities, and land use impacts in the environs of the subject site = Met

- Adequate public infrastructure is or will be available to accommodate the range of uses being proposed for the planned unit development project, including but not limited to public sewer and water and public roads = Met
- The proposed planned unit development project will incorporate appropriate and adequate buffers and transitions between areas of difference land uses and development densities/intensities = Met
- The proposed planned unit development project design does not detract from areas of natural beauty surrounding the site = Met
- The proposed architecture and character of the proposed planned unit development project is compatible with adjacent/nearby development = Met
- The proposed planned unit development project will positively contribute to and not detract from the physical appearance and functional arrangement of development in the area = Met
- The proposed planned unit development project will produce significant benefits in terms of environmental design and significant alternative approaches to addressing development performance that relate to and more than compensate for any requested exceptions/base standard modifications variation of any standard or regulation of this chapter = Met
- For planned unit development projects that are proposed to be developed in phases, the applicant can provide a timeline for development and can demonstrate that the project would be successful even if all phases were not or could not be completed = N/A

The proposed General Development Plan (GDP) identifies nine (9) areas of flexibility from the standards of the DHMU zoning district. Each of the requested flexibilities is directly related to the proposed use, an off-site parking lot, and the physical constraints and configuration typical of downtown development patterns in this area. If a similar project were proposed in another area of Fort Atkinson, there would likely be sufficient space to meet the ordinance's base standards without modification. However, within the core blocks of downtown Fort Atkinson, site limitations and existing development patterns significantly constrain design options.

During the Zoning Ordinance rewrite, Off-Site Parking Lots were intentionally not permitted as a standalone principal use within the DHMU district. This policy decision was made to prioritize the preservation and reuse of existing structures and to prevent large surface parking lots from occupying valuable land within the downtown core. In this instance, however, additional context has been provided through the applicant's parking analysis and a multi-year collaborative process with City staff. The proposal is intended to address documented parking deficiencies, improve a currently underutilized and deteriorating property, upgrade public and private utilities in and around the site, and design the parking area in a manner that is responsive to adjacent land uses and nearby property owners.

City Staff and Premier Bank have worked closely together over an extended period to develop a plan that balances ordinance intent with practical site constraints. Through this collaboration,

the parties have shaped a proposal that improves conditions for all stakeholders and advances the broader interests of the City. The result is a plan that not only addresses the applicant’s operational needs but also contributes to site cleanup, infrastructure improvements, and better overall coordination within the downtown area.

Additionally, the property’s location, positioned off Main Street, helps minimize impacts on the historic streetscape while still providing critical support to downtown activity. By accommodating off-site parking in this location, the project reduces future demand for shared and on-street parking resources, thereby supporting the long-term parking strategy for the downtown district and reinforcing the vitality of the surrounding commercial core.

For these reasons, City staff supports this proposal based on its potential to improve public infrastructure, remove safety hazards, and help coordinate the long-term redevelopment of the downtown area.

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**RECOMMENDATION**

City staff recommends approval of the General Development Plan, with the following conditions:

1. A recommendation to the City Council that the General Development Plan for parcels 226-0514-0322-008 and 226-0514-0322-009 be approved, subject to any and all requirements identified by the Plan Commission.
2. All other applicable standards and requirements of the underlying DHMU zoning district shall continue to be in effect within this established PUD overlay, outside of those flexibilities noted below in item 3.
3. Nine proposed flexibilities from the DHMU zoning district standards:
  - a. Proposed flexibility to allow a permitted by-right principal land use of Off-Site Parking Lots in the DHMU zoning district is granted as proposed in the GDP submittal.
  - b. Proposed flexibility to allow a minimum pavement setback along the street, side, and rear property lines of 0 feet in the DHMU zoning district is granted as proposed in the GDP submittal.
  - c. Proposed flexibility to allow the maximum number of access points to be exceeded up to two on a parcel less than 200 feet in width is granted as proposed in the GDP submittal.
  - d. Proposed flexibility to allow the minimum number of bicycle and pedestrian connections to be less than one is granted as proposed in the GDP submittal.
  - e. Proposed flexibility to allow the minimum vision triangle standards to be less than 10 feet of visual clearance between the driveways and the public right-of-way is granted as proposed in the GDP submittal.
  - f. Proposed flexibility to allow the minimum green space areas for parking lots to be 0 feet along all property lines and between adjacent, neighboring property

- surface parking lots is granted as proposed in the GDP submittal.
- g. Proposed flexibility to allow the minimum permitted throat length to be 4 feet is granted as proposed in the GDP submittal.
  - h. Proposed flexibility to allow the minimum aisle width for two-way traffic flow to be 6 feet on along the western property line is granted as proposed in the GDP submittal.
  - i. Proposed flexibility to allow the maximum footcandles at the property line to be exceeded up a maximum as defined within the SIP approval step.
- 4. Review and approval of a CSM providing cross-access easements with neighboring properties to the West and North and provide a utility easement to the City for replacement of an existing sanitary line, prior to approval of the Specific Implementation Plan.
  - 5. The applicant is required to improve private storm sewer upgrades needed on the parcel and in the surrounding areas in coordination with City staff and adjoining property owners.
  - 6. Any other recommendations of City staff or the Plan Commission.

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**ATTACHMENTS**

- 1. PBP-DRAWINGS Rev 2 11x17 2-5-26
- 2. Premier Bank Documents

# PREMIERBANK PARKING LOT REMODEL

## DRAWING INDEX:

- SP-1 SITE LOCATION & IMAGES, RENDERING
- SP-2 EXISTING SITE PLAN
- SP-3 PROPOSED SITE PLAN
- SP-4 LANDSCAPING PLAN
- SP-5 PROPOSED STORM SEWER LOCATION

## PROJECT DESCRIPTION:

RAZE EXISTING STRUCTURE. EXPAND EXISTING PARKING, SERVING PREMIERBANK. (15) TOTAL PARKING SPACES.

INCREASE GREENSPACE BY 674 S.F. (8.4% INCREASE)

ADDITION OF (5) MASONRY PIERS WITH WROUGHT IRON FENCE TO MATCH EXISTING MASONRY PIERS LOCATED NORTH OF THE SITE AT SHERMAN AVE E -- SEE FORT ATKINSON PUBLIC PARKING LOT AT 210 N MAIN ST.

## EXISTING SITE INFORMATION:

|                          |           |             |
|--------------------------|-----------|-------------|
| SITE AREA:               | 5062 S.F. | (0.12 ACRE) |
| BUILDING FOOTPRINT AREA: | 2412 S.F. | (47.6%)     |
| PARKING AREA:            | 2436 S.F. | (48.1%)     |
| GREEN SPACE AREA:        | 204 S.F.  | (4.02%)     |

23 N. Water Street East  
Fort Atkinson, WI 53538

## PROPOSED SITE INFORMATION:

|                          |           |             |
|--------------------------|-----------|-------------|
| SITE AREA:               | 5062 S.F. | (0.12 ACRE) |
| BUILDING FOOTPRINT AREA: | 0 S.F.    | (00.0%)     |
| PARKING AREA:            | 4299 S.F. | (84.9%)     |
| GREEN SPACE AREA:        | 763 S.F.  | (15.1%)     |

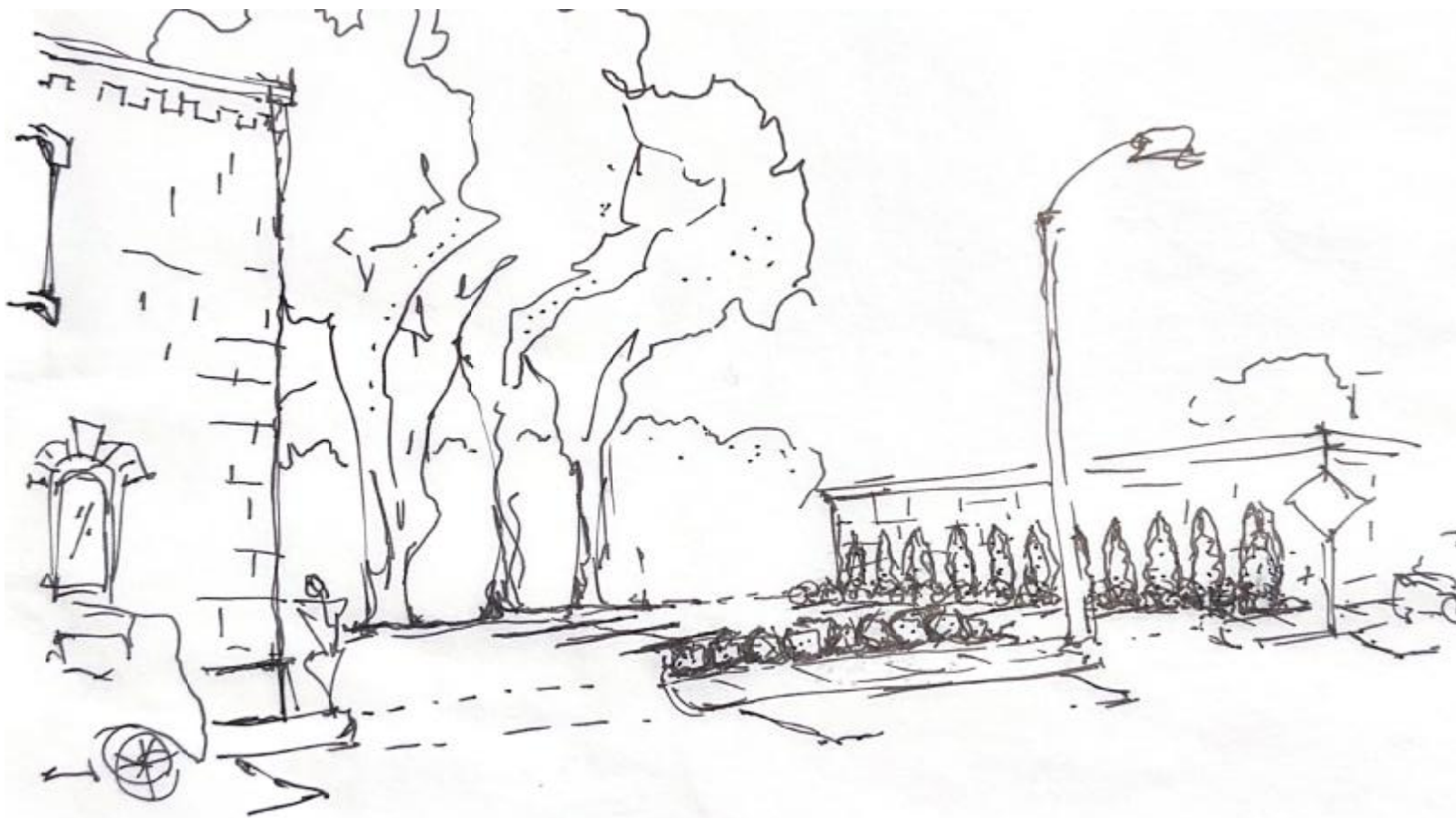
VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START.

ALL DRAWINGS ARE  
1/2 SCALE SHOWN

PRELIMINARY NOT  
FOR CONSTRUCTION



**EXISTING SITE IMAGES**  
SCALE: N.T.S.  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022



**SOUTH PERSPECTIVE RENDERING**  
SCALE: N.T.S.  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022



SITE LOCATION

**SITE LOCATION MAP**  
SCALE: N.T.S.  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022

**Design Alliance Architects, Inc.**

1003 Madison Avenue  
Fort Atkinson, WI  
(920) 563-3404

PREMIER BANK PARKING LOT  
23 N. Water Street East  
Fort Atkinson, WI 53538

### DRAWING NAMES

SITE INFO

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### REVISIONS

|   |           |
|---|-----------|
| 1 | 6/28/2024 |
| 2 | 2/3/2025  |
|   |           |
|   |           |

### PROJECT DATA

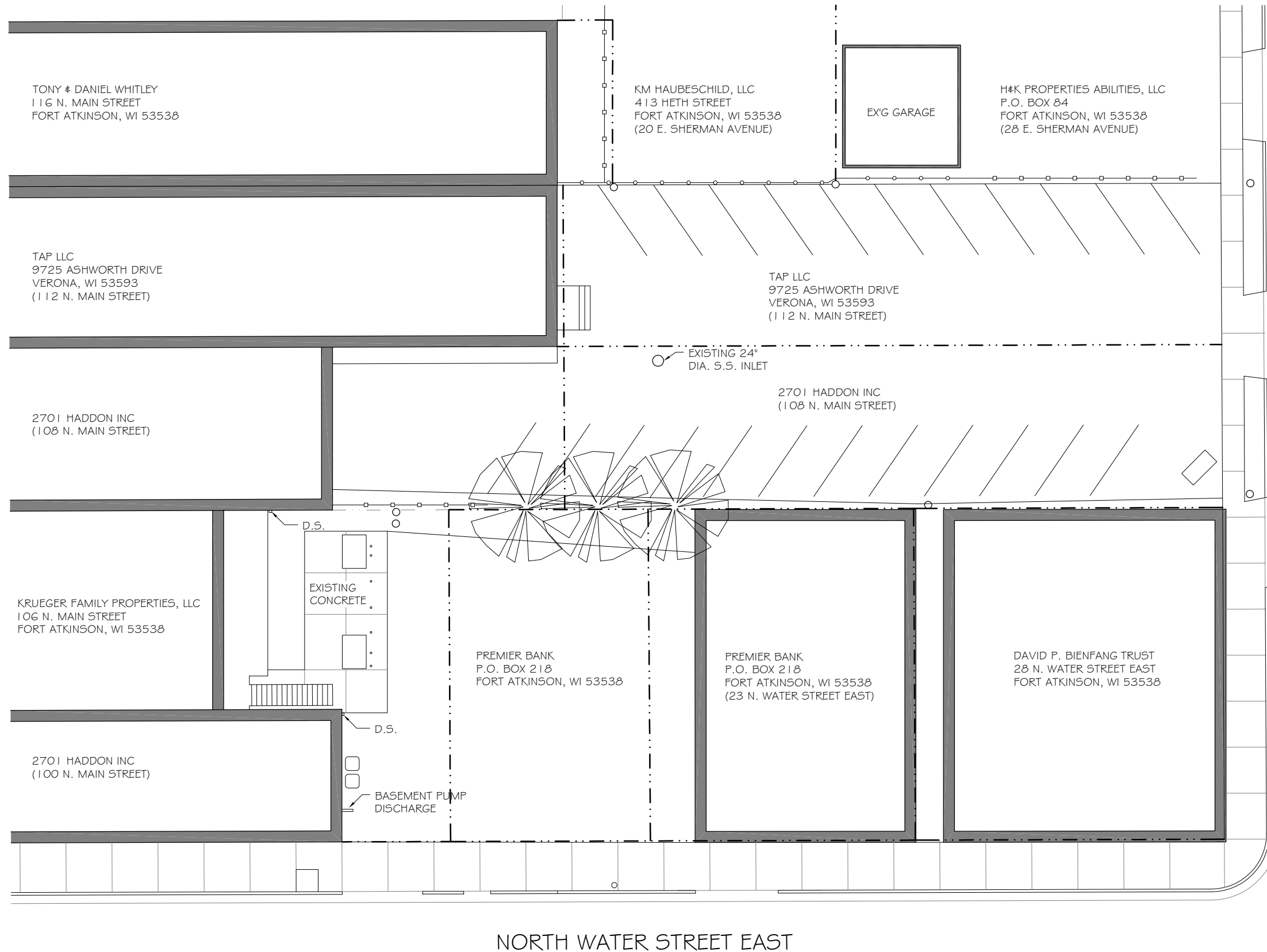
|             |           |
|-------------|-----------|
| DATE:       | 9/13/2023 |
| DRAWN BY:   | CL, CJ    |
| CHECKED BY: | P.W.      |

SHEET NO.

**SP-1**

VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START.

ALL DRAWINGS ARE  
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PRELIMINARY NOT  
FOR CONSTRUCTION



EDWARD STREET

NORTH WATER STREET EAST



EXISTING SITE PLAN

SCALE: 1" = 10'-0"  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022

**Design Alliance Architects, Inc.**  
1003 Madison Avenue  
Fort Atkinson, WI  
(920) 563-3404

**PREMIER BANK PARKING LOT**  
23 N. Water Street East  
Fort Atkinson, WI 53538

DRAWING NAMES

|                    |  |
|--------------------|--|
| EXISTING SITE PLAN |  |
|                    |  |
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REVISIONS

|   |           |
|---|-----------|
| 1 | 6/28/2024 |
| 2 | 2/3/2025  |
|   |           |
|   |           |
|   |           |

PROJECT DATA

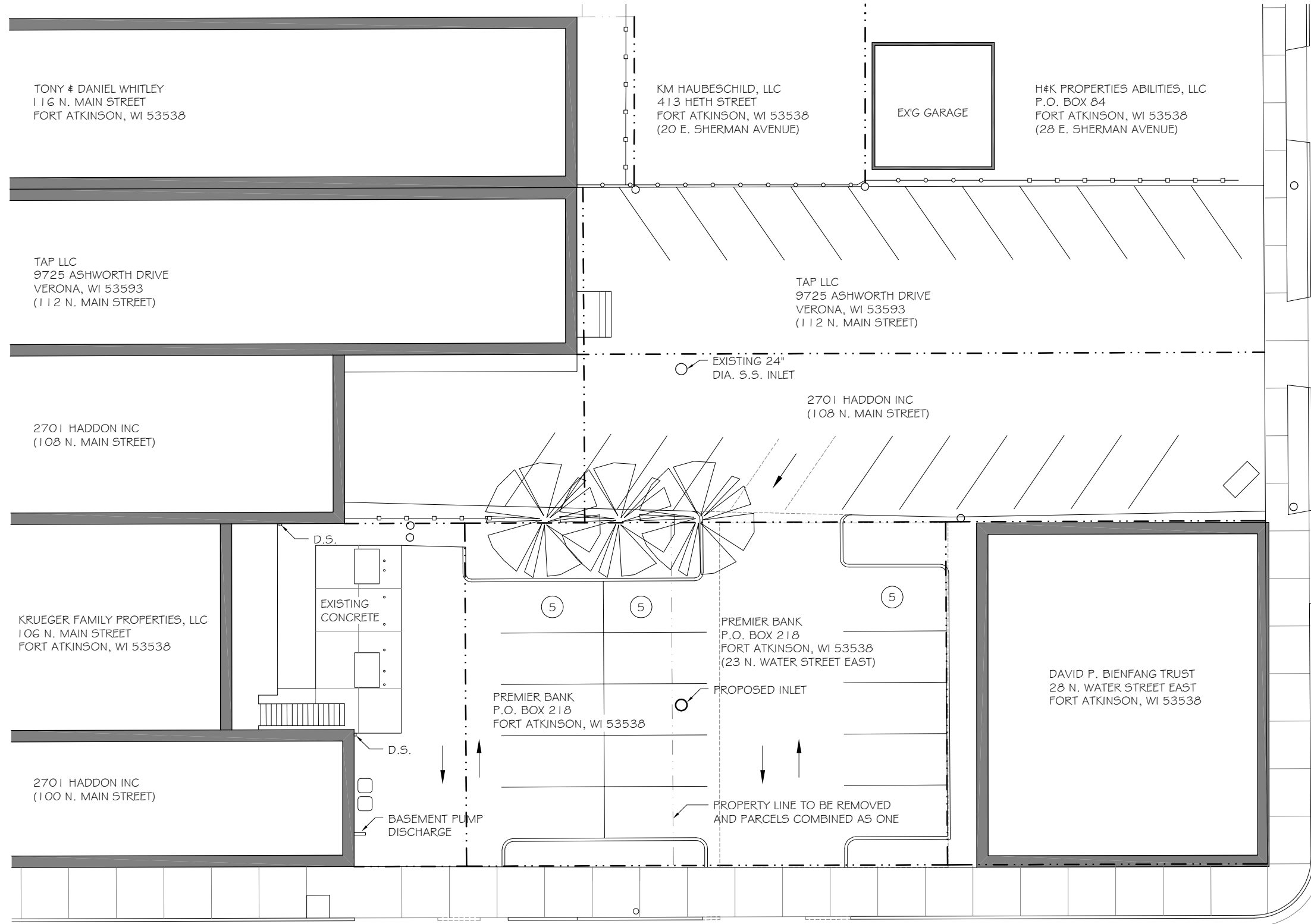
|             |           |
|-------------|-----------|
| DATE:       | 9/13/2023 |
| DRAWN BY:   | CL, CJ    |
| CHECKED BY: | P.W.      |

SHEET NO.

**SP-2**

VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START.

ALL DRAWINGS ARE  
1/2 SCALE SHOWN  
  
PRELIMINARY NOT  
FOR CONSTRUCTION



NORTH WATER STREET EAST

EDWARD STREET



PROPOSED SITE PLAN

SCALE: 1" = 10'-0"  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022

**Design Alliance Architects, Inc.**  
1003 Madison Avenue  
Fort Atkinson, WI  
(920) 563-3404

**PREMIER BANK PARKING LOT**  
23 N. Water Street East  
Fort Atkinson, WI 53538

DRAWING NAMES

PROPOSED SITE PLAN

REVISIONS

|   |           |
|---|-----------|
| 1 | 6/28/2024 |
| 2 | 2/3/2025  |

PROJECT DATA

DATE: 9/13/2023  
DRAWN BY: CL, CJ  
CHECKED BY: P.W.

SHEET NO.

**SP-3**

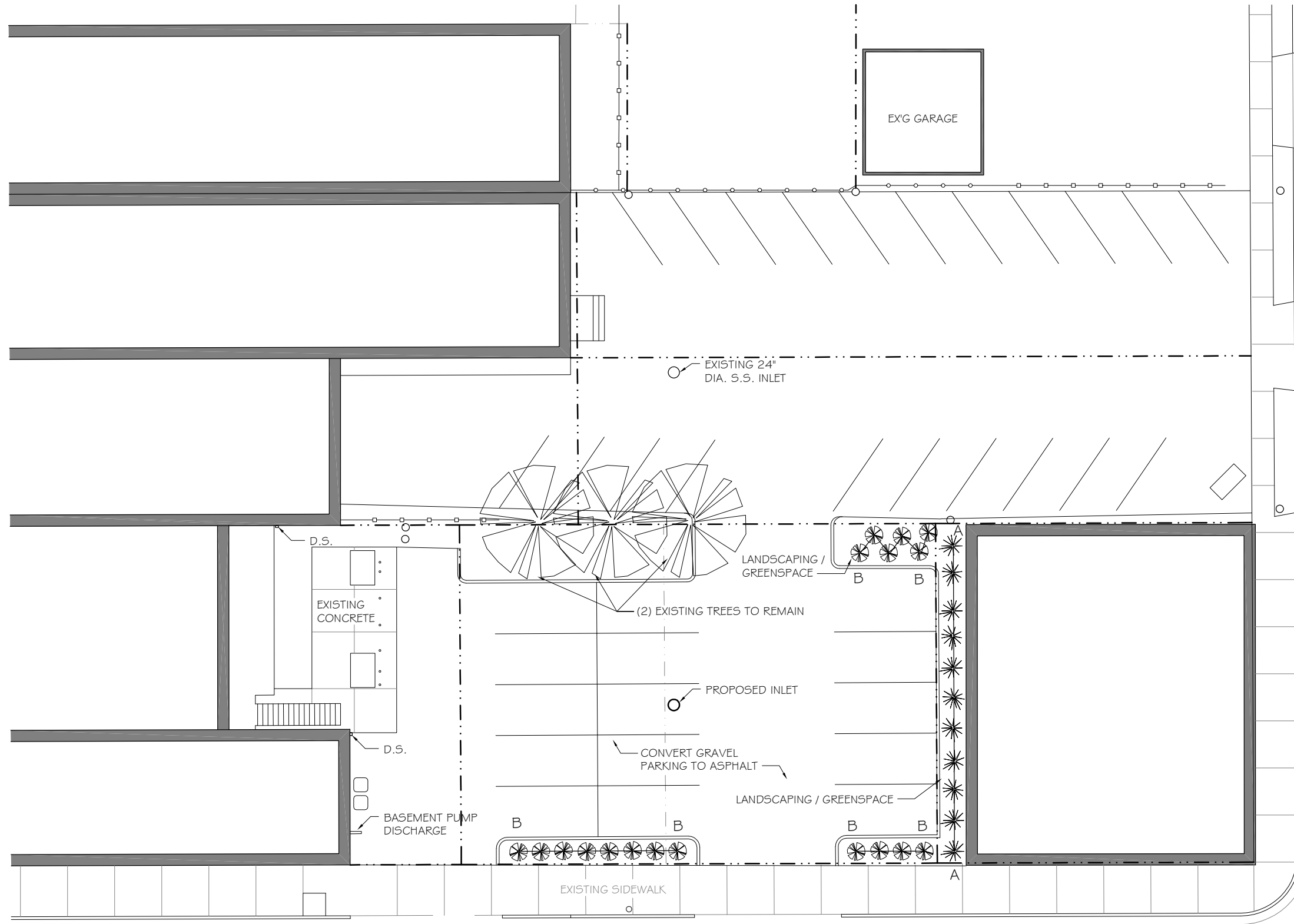
VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START.

ALL DRAWINGS ARE  
1/2 SCALE SHOWN  
PRELIMINARY NOT  
FOR CONSTRUCTION

PLANTING SCHEDULE

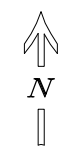
| TYPE | DESCRIPTION             | PLANTING SIZE | MATURE SIZE | QUANTITY |
|------|-------------------------|---------------|-------------|----------|
| A    | ARBOR VITAE 'PYRAMIDAL' | 3-4'H         | 6' DIA      | 11       |
| B    | DWARF SPIREA 'PROEBELI' | 15-18'H       | 3' DIA      | 18       |

NOTE: MATURE SIZES GIVEN ARE FOR PLANT SIZE AFTER 7-12 YEARS GROWTH TYP.



EDWARD STREET

NORTH WATER STREET EAST



LANDSCAPE PLAN  
SCALE: 1" = 10'-0"  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022

**Design Alliance Architects, Inc.**  
1003 Madison Avenue  
Fort Atkinson, WI  
(920) 563-3404

PREMIER BANK PARKING LOT  
23 N. Water Street East  
Fort Atkinson, WI 53538

DRAWING NAMES

PROPOSED SITE PLAN

REVISIONS

| NO. | DATE      |
|-----|-----------|
| 1   | 6/28/2024 |
| 2   | 2/3/2025  |

PROJECT DATA

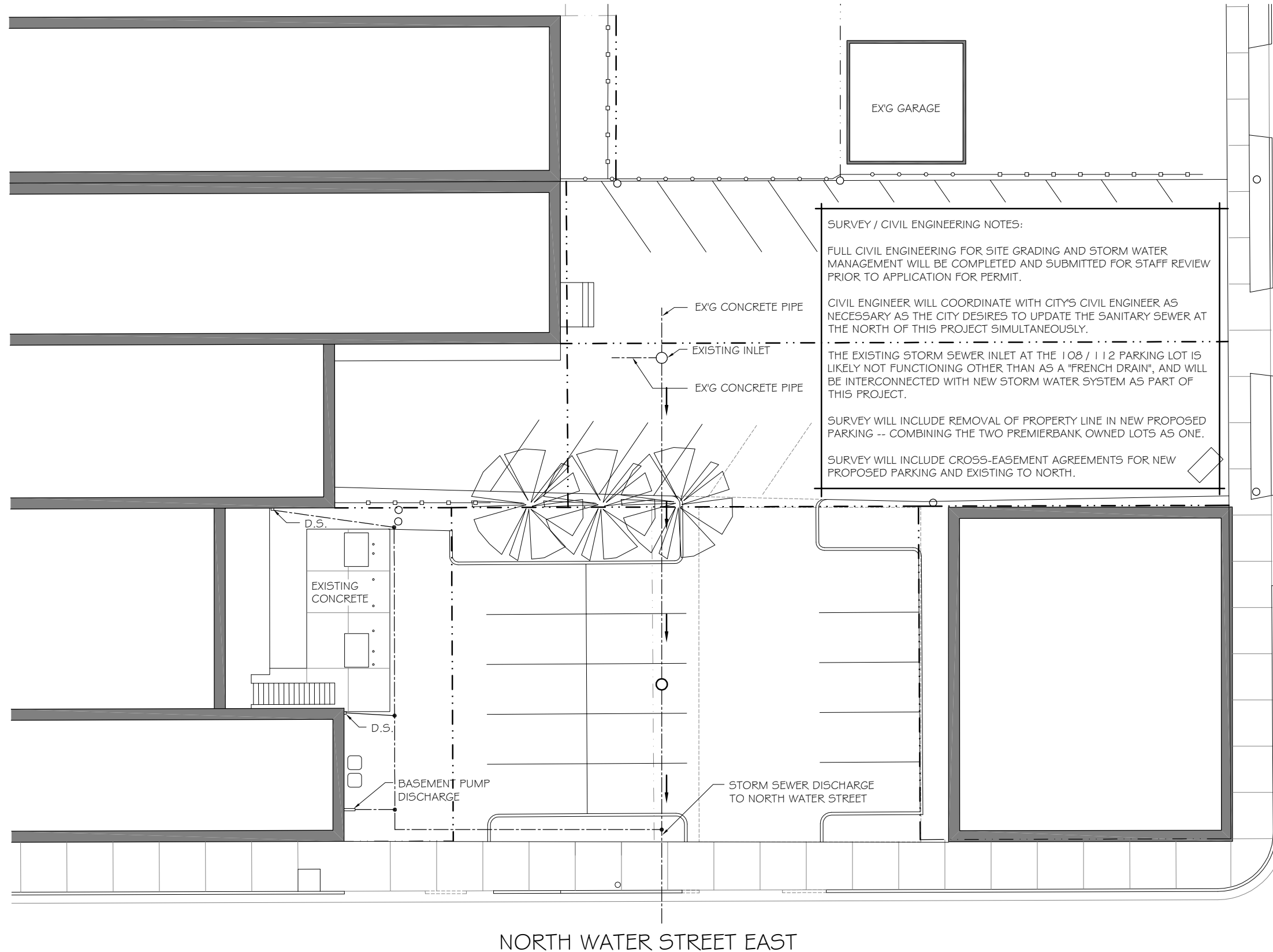
DATE: 9/13/2023  
DRAWN BY: CL, CJ  
CHECKED BY: P.W.

SHEET NO.

SP-4

VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START.

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PRELIMINARY NOT  
FOR CONSTRUCTION



**SURVEY / CIVIL ENGINEERING NOTES:**

FULL CIVIL ENGINEERING FOR SITE GRADING AND STORM WATER MANAGEMENT WILL BE COMPLETED AND SUBMITTED FOR STAFF REVIEW PRIOR TO APPLICATION FOR PERMIT.

CIVIL ENGINEER WILL COORDINATE WITH CITY'S CIVIL ENGINEER AS NECESSARY AS THE CITY DESIRES TO UPDATE THE SANITARY SEWER AT THE NORTH OF THIS PROJECT SIMULTANEOUSLY.

THE EXISTING STORM SEWER INLET AT THE 108 / 112 PARKING LOT IS LIKELY NOT FUNCTIONING OTHER THAN AS A "FRENCH DRAIN", AND WILL BE INTERCONNECTED WITH NEW STORM WATER SYSTEM AS PART OF THIS PROJECT.

SURVEY WILL INCLUDE REMOVAL OF PROPERTY LINE IN NEW PROPOSED PARKING -- COMBINING THE TWO PREMIERBANK OWNED LOTS AS ONE.

SURVEY WILL INCLUDE CROSS-EASEMENT AGREEMENTS FOR NEW PROPOSED PARKING AND EXISTING TO NORTH.

**PREMIER BANK PARKING LOT**  
23 N. Water Street East  
Fort Atkinson, WI 53538

| DRAWING NAMES      |  |
|--------------------|--|
| PROPOSED SITE PLAN |  |

| REVISIONS |           |
|-----------|-----------|
| 1         | 6/28/2024 |
| 2         | 2/3/2025  |

| PROJECT DATA |           |
|--------------|-----------|
| DATE:        | 9/13/2023 |
| DRAWN BY:    | CL, CJ    |
| CHECKED BY:  | P.W.      |

| SHEET NO. |  |
|-----------|--|
| SP-5      |  |



August 15, 2025

Jedidiah Draeger  
Director of Neighborhood and Building Services  
City of Fort Atkinson  
101 N. Main Street  
Fort Atkinson WI 53538

Re: 23 North Water St. East and the westerly adjacent lot

Dear Jed,

Enclosed with this letter is a packet of information related to a planned unit development concept plan that we have previously discussed. In this packet are documents that you received previously along with an executed Cost of Recovery Agreement, our check in the amount of \$400.00 for the application fee and a copy of the completed Certified Survey of the lots at this location. I believe from previous discussions that the lots can be joined together by simply requesting such at the county level and thus the Certified Survey may not be necessary but nonetheless am providing you with a copy for your records. It is our intention to join the lots together as one parcel at some point in time during the project process.

Please let me know if there is anything else needed to get the process started. We are looking forward to working with you on this project.

Sincerely,

Russell L. Turk  
Chairman/President/CEO

**MAIN OFFICE:** 70 N. Main Street • Fort Atkinson, WI 53538 • 920-563-6616

**FORT ATKINSON • JANESVILLE • JEFFERSON • JOHNSON CREEK • SULLIVAN • WHITEWATER**

[bankwithpremier.com](http://bankwithpremier.com)



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

**CITY OF FORT ATKINSON**  
**COST RECOVERY AGREEMENT**

The City of Fort Atkinson may retain the services of **professional consultants** (including planners, engineers, architects, attorneys, environmental specialists, recreation specialists, and/or other experts) to assist in the City's review of a development proposal that may be scheduled for review and action by the Plan Commission and/or City Council. The submittal of a development proposal or land use application by an Applicant shall be construed as an **agreement to pay for such professional services** applicable to the proposal or application. The City may apply reasonable charges for these services to the Applicant through invoices. The City may delay acceptance of the proposal or application as complete, or may delay final approval of the proposal, until the Applicant pays such fees. In the event invoices become delinquent, finance charges will accrue at 1% per month, 30 days after the due date. Review fees invoiced to the Applicant, which are not paid in a timely manner, may be assigned by the City as a special assessment to the subject property. The Applicant hereby waives any notice and hearing requirements provided in Wis. Stats. § 66.0701 or any additions or amendments to this section. The City will provide notice to the applicant of the need to hire a professional consultant.

The Applicant is required to provide the City with an executed copy of this Cost Recovery Agreement as part of the land use application process. Applications are not considered complete and will not be considered by the Plan Commission without this executed Agreement.

\*Application fees are non-refundable. Fees cover the costs associated with mailing public notices, postage, copies and staff review. Applicants must agree to pay all additional expenses the City may incur on their behalf for contracted services (attorney, planner, engineer and required studies).

Applicant Name: PremierBank C/O: Russ Turk

Project Name: 23 N. Water Street E Parking Lot

Project Address: 23 N. Water St. E and adjacent lot

Parcel Number: 226-0514-0322-008 & 226-0514-0322-009

Dated this 15th day of August, 2025.

Agreement signed and entered into by:

**The City of Fort Atkinson**

\_\_\_\_\_  
City Manager

**Property Owner Information:**

**Applicant Information (if different):**

Owner Name: PremierBank

Applicant Name: \_\_\_\_\_

Owner Signature: *Russ Turk*

Applicant Signature: \_\_\_\_\_

Address: 70 N. Main Street

Address: \_\_\_\_\_

Phone Number: 920-542-1144

Phone Number: \_\_\_\_\_

\_\_\_\_\_  
dd \_\_\_\_\_

Email Address: \_\_\_\_\_



**Planned Development Concept Plan - PremierBank**

PremierBank  
Attn.: Russ Turk  
70 N. Main Street  
Fort Atkinson, WI 53038  
Phone: [REDACTED]  
Email: [REDACTED]

Site Location:  
23 North Water St East and the westerly adjacent lot  
Fort Atkinson, WI 53538

Tax Parcel #s: 226-0514-0322-008 & 226-0514-0322-009

**Introduction:**

Historic downtown districts are the heart of a city, reflecting its rich cultural heritage. Fort Atkinson is no exception. Our downtown serves as a vital hub for commerce and social interaction, and we take pride in being part of this thriving area. A strong and growing downtown is essential to the overall success of a community. However, limited parking can significantly hinder this growth. A recent parking survey has identified a critical shortage of spaces. To address this need, PremierBank plans to build a new parking lot near its downtown location, aiming to support the economic vitality of the area

**Description of Proposal:**

This proposal is not a normal PUD application in that several of the items normally provided within a concept plan for a PUD will not pertain to this project. Therefore, those items that pertain will be addressed as best we can.

PremierBank owns the above referenced parcels, one of which is a gravel parking area and the other is a metal building that has been vacant for several years (previously an auto alignment shop). The bank desires to combine the two lots into one parcel and construct a blacktop parking lot for this area. A survey has already been completed in preparation of the lot combination. In doing this, the parking lot will not only provide additional parking for Bank staff and customers but also for other area businesses as well.

As a part of this proposal and to determine the potential need for a parking facility in the area, PremierBank engaged Traffic Analysis & Design, Inc. (TADi) of Cedarburg to conduct a parking evaluation for the immediate area. As a result of the parking evaluation, TADi has concluded,

- *“The construction of a 15-space paved parking lot in place of a four-space gravel lot and building at 23 N. Water Street East is expected to reduce the future peak occupancy of parking areas immediately surrounding the Premier Bank at N. Main Street. Without this lot, and without the potential availability for bank staff to park in the Bienfang’s Bar*

*parking lot, peak occupancy in these parking areas will increase significantly with limited parking availability for banking customers. Therefore, it is recommended that a new 15-space paved parking lot be constructed to accommodate the expected future parking demand." (italics added)*

To be aesthetically pleasing to the area, PremierBank is looking to fulfill the goal of enhancing the natural beauty of the area, while at the same time seeking to provide an economic boost to the commerce of the area. With that in mind, The Design Alliance Architects, Inc. company was hired to prepare a design rendering of the site so that the general project themes, images, general treatment of the natural features and the relationship to nearby properties and public streets are addressed in such a way to fulfill this goal. The design rendering has been included in this packet for review.

In addition, and as requested, the two lots have been surveyed, and the plan is to join the two parcels into one thus facilitating a clean and unobstructed parcel map of the area being developed. A copy of the proposed survey is included in this packet for review and acceptance.

### **Conclusion**

The construction of a new parking lot in the historic downtown district is not merely a logistical improvement but a strategic investment in the economic vitality of the area. The findings from the parking survey clearly outline the necessity for additional parking, and the potential economic benefits are substantial. By enhancing accessibility, supporting local businesses, and attracting more visitors, a new parking lot will serve as a catalyst for economic growth and sustainability in our historic downtown district. The time to act is now, to ensure that our downtown area continues to thrive and preserve its historic charm for future generations.



### Procedural Checklist for Planned Developments

The process for review and approval of the General Development Plan shall be identical to that for zoning map amendments per Section 15.10.31. The process for review and approval of the Specific Implementation Plan shall be identical to that for site plans per Section 15.10.42.

This form is designed to be used by the Applicant as a guide for submitting a complete for a Planned Development (PUD) and by the City to process the application.

Name, company, and client (if applicable): PremierBank, 70 N. Main St., Fort Atkinson, WI 53538

Contact person: Russ Turk

Phone number: [REDACTED] Email: [REDACTED]

Property address for Planned Development: 23 N. Water St. E and the westerly adjacent vacant lot with tax parcel #s of 226-0514-0322-008 and 226-0514-0322-009

#### I Application Packet Requirements See attached for content pertaining to this section.

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

- A. Pre-Application Conference.** Prior to formal petition for zoning to a PUD district, the applicant shall confer with appropriate City staff in order to establish mutual understanding as to the basic concept proposed and to ensure proper compliance with the requirements for processing. Points of discussion and conclusions reached in this stage of the process shall in no way be binding upon the applicant or the City, but should be considered as the informal, non-binding basis for proceeding to the next step.
- B. Concept Plan.** Upon completion of the pre-application conference, described above, the applicant may decide to prepare an optional conceptual plan for review by the Plan Commission.

The Plan Commission or City Council may waive submittal information listed below, and/or may likewise require additional information beyond that listed below. The Plan Commission shall accept the concept plan and inform the application to move on to the next step in the PUD process, General Development Plan.

The concept plan submittal shall include the following items:

- A location map of the subject property and its vicinity.
- A general written description of the proposed PUD, including:
  - General project themes and images.
  - The general mix of dwelling unit types and/or land uses.
  - Approximate residential densities and nonresidential intensities as described by dwelling units per acre, landscaping surface ratio, and/or other appropriate measures of density and intensity.
  - General treatment of natural features.
  - Relationship to nearby properties and public streets.
  - Relationship of the project to the Comprehensive Plan.
  - Description of potentially requested exceptions from the requirements of this Chapter. The purpose of this information shall be to provide the Plan Commission with information necessary to determine the relative merits of the project with respect to private versus public benefit, and to evaluate the

potential adverse impacts created by making exceptions to standard zoning district requirements.

- A conceptual drawing of the site plan layout, including the general locations of public streets and/or private drives.

**C. General Development Plan (GDP):**

The GDP submittal shall include the following items:

- General location map of the subject site depicting:
  - All lands for which the Planned Unit Development is proposed and all other lands within 100 feet of the boundaries of the subject site.
  - Current zoning of the subject site and abutting properties, and the jurisdiction(s) that maintains that control.
  - A graphic scale and a north arrow.
- Generalized site plan showing the pattern or proposed land uses, including:
  - General size, shape, and arrangement of lots and specific use areas.
  - Basic street pattern and pattern of internal drives.
  - General site grading plan showing preliminary road grades.
  - Basic storm drainage pattern, including proposed on-site stormwater detention.
  - General location of recreational and open space areas, including designation of any such areas to be classified as common open space.
- Statistical data, including:
  - Minimum lot sizes in the development.
  - Approximate areas of all lots.
  - Density/intensity of various parts of the development.
  - Building coverage.
  - Landscaping surface area ratio of all land uses.
  - Expected staging.
- Conceptual landscaping plan, noting approximate locations of foundation, street, yard, and paving landscaping, and comparing the proposed landscaping plan to the standard landscaping requirements in Article VIII.
- General signage plan, including all project identification signs and concepts for public fixtures and signs (such as street light fixtures and/or poles or street sign faces and/or poles) which are proposed to vary from City standards or common practices.
- General outline of property owners' association, covenants, easements, and deed restrictions.
- A written description of the proposed Planned Unit Development, including:
  - General project themes and images.
  - The general mix of dwelling unit types and/or land uses.
  - Approximate residential densities and nonresidential intensities as described by dwelling units per acre, landscaping surface area ratio, and/or other appropriate measures of density and intensity.
  - General treatment of natural features.
  - General relationship to nearby properties and public streets.

- General relationship of the project to the Comprehensive Plan.
  - Proposed exceptions from the requirements of this Chapter.
  - A Traffic Impact Analysis – if deemed necessary by Zoning Administrator – that evaluates the adequacy of the existing and proposed transportation system that services the PUD and addresses all elements of the transportation system as it related to pedestrians, bicyclists, transit, vehicular traffic, and adjacent land development. WisDOT TIA requirements must be followed if a development project has direct access to the State Trunk Highway System.
- D. Specific Implementation Plan (SIP):**

Upon completion of the GDP review process, described above, the applicant shall submit a Specific Implementation Plan to the Zoning Administrator for determination of completeness. The SIP may be placed on the Plan Commission agenda once the Zoning Administrator determines the SIP to be complete.

The Zoning Administrator, or by majority vote of the Plan Commission may waive submittal information listed below, and/or may likewise require additional information beyond that listed below. Note that the area included in a SIP may be only a portion of the area included in a previously approved GDP. The SIP submittal shall include the following items:

- An existing conditions map of the subject site depicting the following:
  - All lands for which the Planned Development is proposed and all other lands within 100 feet of the boundaries of the subject site.
  - Current zoning of the subject property and all abutting properties, and the jurisdiction(s) that maintains that control.
  - Existing utilities and recorded easements.
  - All lot dimensions of the subject site.
  - A graphic scale and a north arrow.
- A SIP map of the proposed site showing at least the following:
  - Lot layout and the arrangements of buildings.
  - Public and private roads, driveways, walkways, and parking facilities.
  - Specific treatment and location of recreational and open space areas, including designation of any such areas to be classified as common open space.
- Proposed grading plan.
- Specific landscaping plan for the subject site, specifying the location, species, and installation size of all plantings. The landscaping plans shall include a table summarizing all proposed species.
- Architectural plans for any nonresidential buildings, multifamily structures, or building clusters, other than conventional single-family homes or individual lots, in sufficient detail to indicate the floor area, bulk, and visual character of such buildings.
- Engineering plans for all water and sewer systems, stormwater systems, roads, parking areas, and walkways.
- Signage plan for the project, including all project identification signs, concepts for public fixtures and signs (such as street light fixtures and/or poles or street sign faces and/or poles), and group development signage themes that are proposed to vary from City standards or common practices.
- Specific written description of the proposed SIP including:
  - Specific project themes and images.
  - Specific mix of dwelling unit types and/or land uses.

- Specific residential densities and nonresidential intensities as described by dwelling units per acre, and landscaping surface area ratio and/or other appropriate measures of density and intensity.
- Specific treatment of natural features, including parkland.
- Specific relationship to nearby properties and public streets.
- Statistical data on minimum lot sizes in the development, the precise areas of all development lots and pads; density/intensity of various parts of the development; building coverage, and landscaping surface area ratio of all land uses; proposed staging; and any other plans required by the Plan Commission.
- A statement of rationale as to why PUD zoning is proposed. This statement shall list the standard zoning requirements that, in the applicant's opinion, would inhibit the development project and the opportunities for community betterment that are available through the proposed PUD project.
- A complete list of zoning standards that would not be met by the proposed SIP and the location(s) in which such exceptions would occur.
- Phasing schedule, if more than one development phase is intended.
- Agreements, bylaws, covenants, and other documents relative to the operational regulations of the development and particularly providing for the permanent preservation and maintenance of common open areas and amenities.
- A written description that demonstrates how the SIP is consistent with the approved GDP and any and all differences between the requirements of the approved GDP and the proposed SIP.

## II Criteria Used to Evaluate the Planned Development Application

See Section 15.10.44(e) for criteria used by the Zoning Administrator to evaluate the application. The Plan Commission shall make findings with respect to the following criteria:

1. The proposed Planned Unit Development project is consistent with the overall purpose and intent of the Fort Atkinson Zoning Code.
2. The proposed Planned Unit Development project is consistent with the City's Comprehensive Plan and other area plans. (It is the responsibility of the City to determine such consistency.)
3. The proposed Planned Unit Development project would maintain the desired relationships between land uses, land use densities and intensities, and land use impacts in the environs of the subject site.
4. Adequate public infrastructure is or will be available to accommodate the range of uses being proposed for the Planned Unit Development project, including but not limited to public sewer and water and public roads.
5. The proposed Planned Unit Development project will incorporate appropriate and adequate buffers and transitions between areas of difference land uses and development densities/intensities.
6. The proposed Planned Unit Development project design does not detract from areas of natural beauty surrounding the site.
7. The proposed architecture and character of the proposed Planned Unit Development project is compatible with adjacent/nearby development.
8. The proposed Planned Unit Development project will positively contribute to and not detract from the physical appearance and functional arrangement of development in the area.



9. The proposed Planned Unit Development project will produce significant benefits in terms of environmental design and significant alternative approaches to addressing development performance that relate to and more than compensate for any requested exceptions modifications variation of any standard or regulation of the Fort Atkinson Zoning Code.
10. For Planned Unit Development projects that are proposed to be developed in phases, the applicant can provide a timeline for development and can demonstrate that the project would be successful even if all phases were not or could not be completed.

### III Process Checklist

- |  |                      |
|--|----------------------|
| <input type="checkbox"/> Pre-Application Conference  | Date: <u>sm 3/18</u> |
| <input type="checkbox"/> Plan Commission Concept Plan Review   | Date: _____          |
| <input type="checkbox"/> General Development Plan ( <i>same process as zoning map amendment</i> )    |                      |
| <input type="checkbox"/> Application fee of \$200.00 received by City Clerk                          | Date: <u>sm 3/18</u> |
| <input type="checkbox"/> Reimbursement of professional consultant costs agreement executed.          | Date: <u>sm 3/18</u> |
| <input type="checkbox"/> Receipt of GDP by Zoning Administrator                                      | Date: <u>sm 3/18</u> |
| <input type="checkbox"/> Development Review Team Input   | Date: <u>sm 3/18</u> |
| <input type="checkbox"/> Class 2 legal notice sent to official newspaper by City Clerk               | Date: _____          |
| <input type="checkbox"/> Class 2 legal notice published on _____ and _____                           | Date: _____          |
| <input type="checkbox"/> Notification of neighboring property owners within 100 feet of the petition | Date: _____          |
| <input type="checkbox"/> Notification of clerks of municipalities within 1,000 feet of the petition  | Date: _____          |
| <input type="checkbox"/> Notification of airports within 3 miles of the petition                     | Date: _____          |
| <input type="checkbox"/> Plan Commission Public Hearing, review and recommendation                   | Date: _____          |
| <input type="checkbox"/> Common Council review and action  | Date: _____          |
| <input type="checkbox"/> Specific Implementation Plan ( <i>same process as site plan</i> )           |                      |
| <input type="checkbox"/> Receipt of SIP by Zoning Administrator                                      | Date: _____          |
| <input type="checkbox"/> Development Review Team Input   | Date: _____          |
| <input type="checkbox"/> Zoning Administrator Report   | Date: _____          |
| <input type="checkbox"/> Plan Commission Public Meeting  | Date: _____          |
| <input type="checkbox"/> Plan Commission Review and Action   | Date: _____          |

## Planned Development Concept Plan - PremierBank

*PremierBank*

*Attn.: Russ Turk*

*70 N. Main Street*

*Fort Atkinson, WI 53038*

*Phone:* [REDACTED]  
[REDACTED]

### Site Location:

23 North Water St East and the westerly adjacent lot  
Fort Atkinson, WI 53538

Tax Parcel #: 226-0514-0322-008 & 226-0514-0322-009

### Introduction:

Historic downtown districts are the heart of a city, reflecting its rich cultural heritage. Fort Atkinson is no exception. Our downtown serves as a vital hub for commerce and social interaction, and we take pride in being part of this thriving area. A strong and growing downtown is essential to the overall success of a community. However, limited parking can significantly hinder this growth. A recent parking survey has identified a critical shortage of spaces. To address this need, PremierBank plans to build a new parking lot near its downtown location, aiming to support the economic vitality of the area

### Description of Proposal:

This proposal is not a normal PUD application in that several of the items normally provided within a concept plan for a PUD will not pertain to this project. Therefore, those items that pertain will be addressed as best we can.

PremierBank owns the above referenced parcels, one of which is a gravel parking area and the other is a metal building that has been vacant for several years (previously an auto alignment shop). The bank desires to combine the two lots into one parcel and construct a blacktop parking lot for this area. A survey has already been completed in preparation of the lot combination. In doing this, the parking lot will not only provide additional parking for Bank staff and customers but also for other area businesses as well.

As a part of this proposal and to determine the potential need for a parking facility in the area, PremierBank engaged Traffic Analysis & Design, Inc. (TADi) of Cedarburg to conduct a parking evaluation for the immediate area. As a result of the parking evaluation, TADi has concluded,

- *“The construction of a 15-space paved parking lot in place of a four-space gravel lot and building at 23 N. Water Street East is expected to reduce the future peak occupancy of parking areas immediately surrounding the Premier Bank at N. Main Street. Without this lot, and without the potential availability for bank staff to park in the Bienfang’s Bar*

*parking lot, peak occupancy in these parking areas will increase significantly with limited parking availability for banking customers. Therefore, it is recommended that a new 15-space paved parking lot be constructed to accommodate the expected future parking demand.”(italics added)*

To be aesthetically pleasing to the area, PremierBank is looking to fulfill the goal of enhancing the natural beauty of the area, while at the same time seeking to provide an economic boost to the commerce of the area. With that in mind, The Design Alliance Architects, Inc. company was hired to prepare a design rendering of the site so that the general project themes, images, general treatment of the natural features and the relationship to nearby properties and public streets are addressed in such a way to fulfill this goal. The design rendering has been included in this packet for review.

In addition, and as requested, the two lots have been surveyed, and the plan is to join the two parcels into one thus facilitating a clean and unobstructed parcel map of the area being developed. A copy of the proposed survey is included in this packet for review and acceptance.

### **Conclusion**

The construction of a new parking lot in the historic downtown district is not merely a logistical improvement but a strategic investment in the economic vitality of the area. The findings from the parking survey clearly outline the necessity for additional parking, and the potential economic benefits are substantial. By enhancing accessibility, supporting local businesses, and attracting more visitors, a new parking lot will serve as a catalyst for economic growth and sustainability in our historic downtown district. The time to act is now, to ensure that our downtown area continues to thrive and preserve its historic charm for future generations.

Proposed Parking Lot location



## TECHNICAL MEMORANDUM

**Date:** March 10, 2023

**To:** Russ Turk, Chairman/President/CEO  
Premier Bank

**From:** Tammi Czewski, P.E., PTOE  
Traffic Analysis & Design, Inc.

**Subject:** **Parking Evaluation for Premier Bank  
Fort Atkinson, WI**

---

Premier Bank proposes to construct a new parking lot on the north side of N. Water Street East, opposite the N. Main Street bank location in Fort Atkinson, Wisconsin. The proposed 15-space paved parking lot would replace an existing building and four-space gravel lot at 23 N. Water Street East. Under an existing agreement, Premier Bank staff currently utilizes excess parking on the adjacent Bienfang's Bar property. The proposed parking lot would replace some of this parking should the agreement not continue in the future.

This technical memorandum was prepared to evaluate the existing parking occupancy (supply & demand) surrounding the Premier Bank building compared to future occupancy without bank parking at Bienfang's Bar and with additional parking in the proposed lot. The location of the Premier Bank, proposed parking lot, and parking evaluation study area are shown on [Exhibit 1](#). A conceptual site plan for the proposed parking lot is shown on [Exhibit 2](#).

### **Existing Parking Supply**

TADI documented the available parking supply in the Bienfang's Bar parking lot, the Premier Bank parking lots (at both the N. Main Street location and Sherman Avenue East locations), the gravel lot north of the N. Main Street Premier Bank, and public on-street spaces along N. Water Street East, N. Main Street, and Edward Street. There is total supply of 102 parking spaces in these areas.

### **Existing Parking Demand & Occupancy**

TADI documented the parking demand (occupied spaces) in each parking area every hour from 10:00 a.m. to 4:00 p.m. on February 24, 2023. Based on the compiled data, the highest

combined number of occupied parking spaces occurred at 2:00 p.m. During this time, 58 of the available parking spaces were occupied with vehicles (six spaces were occupied with snow piles), resulting in an existing vehicle occupancy rate of 57%. The snow-occupied spaces were in the Premier Bank parking lot on N. Main Street (three spaces occupied) and in the Premier Bank parking lot on Sherman Avenue (three occupied spaces). To represent “typical” conditions where these spaces are available for vehicle parking, this study does not consider the snow-filled spaces as a demand value in the occupancy calculations.

The hourly parking supply and demand counts and peak occupancy rate for each parking area is shown in [Table 1](#). The parking data is also shown graphically on [Exhibit 3](#).

**Table 1. Existing Parking Supply & Demand**

| Time                     | Main Street | Premier Bank | Bienfang's Bar | Edward Street "South" | Water Street | Gravel Lot | Edward Street "North" | Premier Bank Branch | Total Parked Cars |
|--------------------------|-------------|--------------|----------------|-----------------------|--------------|------------|-----------------------|---------------------|-------------------|
| 10:00 AM                 | 1           | 10           | 12             | 7                     | 6            | 4          | 5                     | 7                   | 52                |
| 11:00 AM                 | 0           | 5            | 13             | 6                     | 6            | 4          | 9                     | 7                   | 50                |
| 12:00 PM                 | 0           | 4            | 13             | 5                     | 9            | 4          | 9                     | 5                   | 49                |
| 1:00 PM                  | 0           | 4            | 13             | 6                     | 8            | 3          | 10                    | 7                   | 51                |
| 2:00 PM                  | 0           | 10           | 14             | 6                     | 10           | 4          | 8                     | 6                   | 58                |
| 3:00 PM                  | 0           | 4            | 14             | 7                     | 10           | 4          | 8                     | 7                   | 54                |
| 4:00 PM                  | 0           | 5            | 12             | 8                     | 8            | 4          | 11                    | 7                   | 55                |
| Total Supply             | 6           | 22           | 17             | 10                    | 12           | 4          | 14                    | 17                  | 102               |
| Peak Vehicle Occupancy % | 0%          | 45%          | 82%            | 60%                   | 83%          | 100%       | 57%                   | 35%                 | 57%               |

### Future Parking Demand & Occupancy

Premier Bank reports typical staff occupancy of about 45 per day in the N. Main Street location, which at times grows up to 55 per day. Assuming that the existing parking demand counts represent a typical day for bank staff, the future demand volumes were adjusted to account for an additional 10 peak occupied spaces.

Based on field notes during the parking demand counts, at least 12 of the 14 vehicles parked at Bienfang’s Bar at 2:00 p.m. appeared to be from bank staff (these vehicles were parked in the lot prior to the bar opening at 11:00 a.m., moved only at lunch, and returned for the remainder of the day). This lot may not be available for bank parking in the future. Therefore, the 17 spaces in the Bienfang’s Bar parking lot were removed from the parking supply available to bank staff, and the two non-bank vehicles parked in the Bienfang’s Bar parking lot at 2:00 p.m. were removed from the parking demand.

The additional bank staff and reduction in available staff parking spaces results in a future peak occupancy of 78% (66-space demand and 85-space supply). Assuming that the staff displaced from the Bienfang’s Bar parking lot will park in the closest-available lots to the Premier Bank at N. Main Street, many of these parking areas will be 100% full. This leaves limited additional spaces needed to accommodate overlapping parking for customer turnover. The future estimated parking occupancy for each parking area is shown on [Exhibit 4](#).

If the existing gravel lot north of the Premier Bank were replaced with a 15-space paved parking lot, the parking supply would increase to 96 spaces, resulting in an overall future peak occupancy of 69%. Parking lots surrounding the bank can be less than “full” (parking areas are typically considered “full” at 85% occupancy) without N. Main Street Premier Bank staff or customers having to park more remotely along the northern study segment of Edward Street or within the Sherman Avenue Premier Bank parking lot. The future estimated parking occupancy for each parking area with the additional propose parking lot on N. Water Street East is shown on Exhibit 5. A detailed summary of future supply, demand, and occupancy for each parking area is in Table 2.

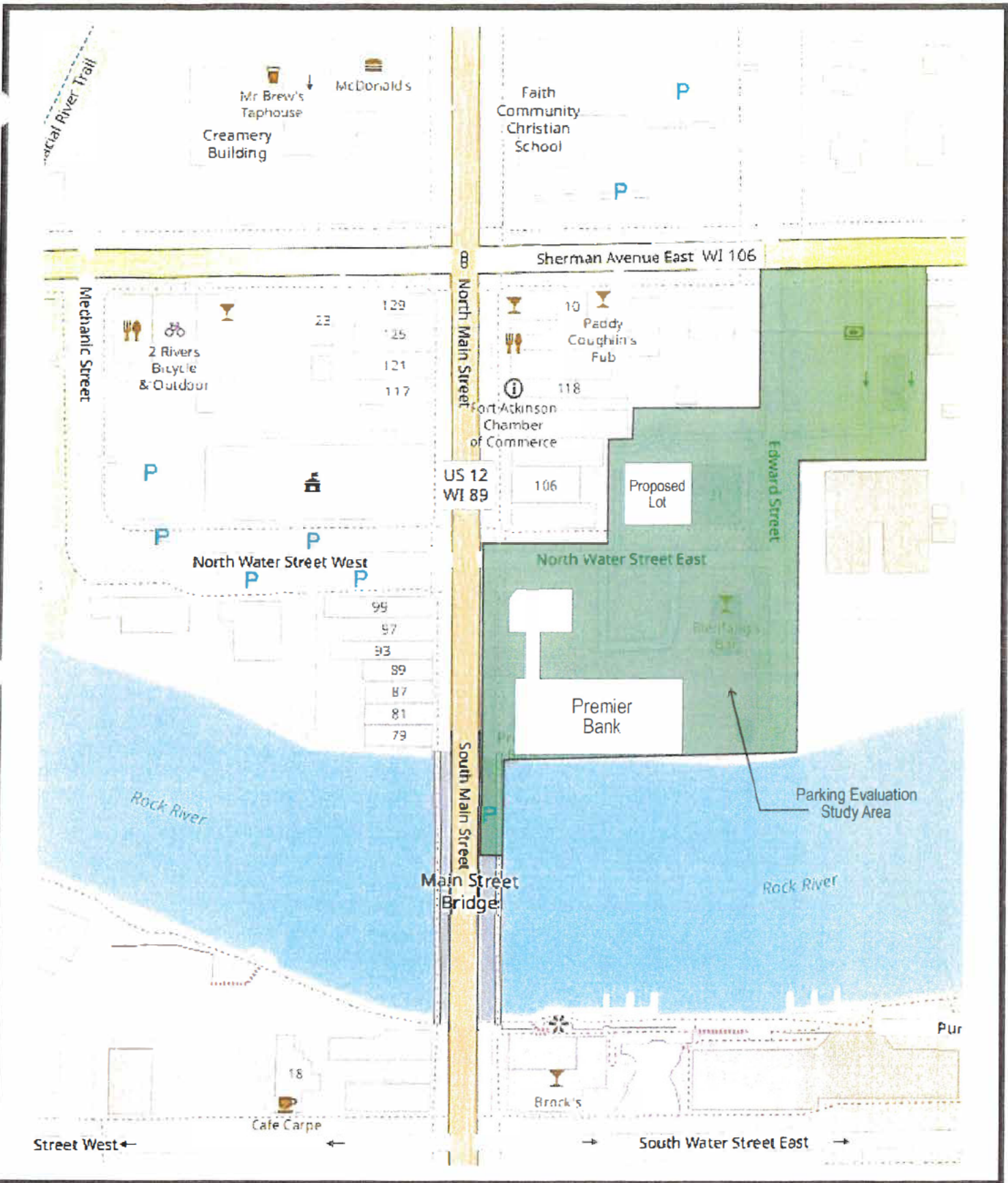
**Table 2. Future Parking Supply & Demand**

| Peak Parking<br>2:00-3:00 p.m.   | Main<br>Street | Premier<br>Bank | Bienfang's<br>Bar | Edward<br>Street<br>"South" | Water<br>Street | Gravel<br>Lot/<br>New Lot | Edward<br>Street<br>"North" | Premier<br>Bank<br>Branch | Total<br>Parked<br>Cars |
|--|----------------|-----------------|-------------------|-----------------------------|-----------------|---------------------------|-----------------------------|---------------------------|-------------------------|
| <b>Existing Conditions</b>   |                |                 |                   |                             |                 |                           |                             |                           |                         |
| Existing Demand  | 0              | 10              | 14                | 6                           | 10              | 4                         | 8                           | 6                         | 58                      |
| Existing Supply  | 6              | 22              | 17                | 10                          | 12              | 4                         | 14                          | 17                        | 102                     |
| Existing Occupancy   | 0%             | 45%             | 82%               | 60%                         | 83%             | 100%                      | 57%                         | 35%                       | 57%                     |
| <b>Future Conditions @ Bank (+10 staff) with No Parking at Bienfang's Bar (12 Parking Elsewhere)</b>                             |                |                 |                   |                             |                 |                           |                             |                           |                         |
| Demand   | 6              | 22              |                   | 8                           | 12              | 4                         | 8                           | 6                         | 66                      |
| Supply   | 6              | 22              |                   | 10                          | 12              | 4                         | 14                          | 17                        | 85                      |
| Occupancy  | 100%           | 100%            |                   | 80%                         | 100%            | 100%                      | 57%                         | 35%                       | 78%                     |
| <b>Future Conditions @ Bank (+10 staff) with No Parking at Bienfang's Bar (12 Parking Elsewhere) &amp; New Lot on Gravel Lot</b> |                |                 |                   |                             |                 |                           |                             |                           |                         |
| Demand   | 4              | 18              |                   | 8                           | 10              | 12                        | 8                           | 6                         | 66                      |
| Supply   | 6              | 22              |                   | 10                          | 12              | 15                        | 14                          | 17                        | 96                      |
| Occupancy  | 67%            | 82%             |                   | 80%                         | 83%             | 80%                       | 57%                         | 35%                       | 69%                     |

Note that an angled parking option was considered for N. Water Street East, similar to the angled on-street parking on Water Street west of Main Street, as an option to constructing the proposed 15-space paved parking lot at 23 N. Water Street East. Due to the presence of parking lot driveways and garage door driveways on both sides of the road, the net increase in spaces is expected to be minimal (1 or 2 spaces). As such, this option is not expected to significantly improve future parking occupancy in the parking areas surrounding the N. Main Street Premier Bank and was therefore not detailed in this study.

**Conclusions**

The construction of a 15-space paved parking lot in place of a four-space gravel lot and building at 23 N. Water Street East is expected to reduce the future peak occupancy of parking areas immediately surrounding the Premier Bank at N. Main Street. Without this lot, and without the potential availability for bank staff to park in the Bienfang’s Bar parking lot, peak occupancy in these parking areas will increase significantly with limited parking availability for banking customers. Therefore, it is recommended that a new 15-space paved parking lot be constructed to accommodate the expected future parking demand.

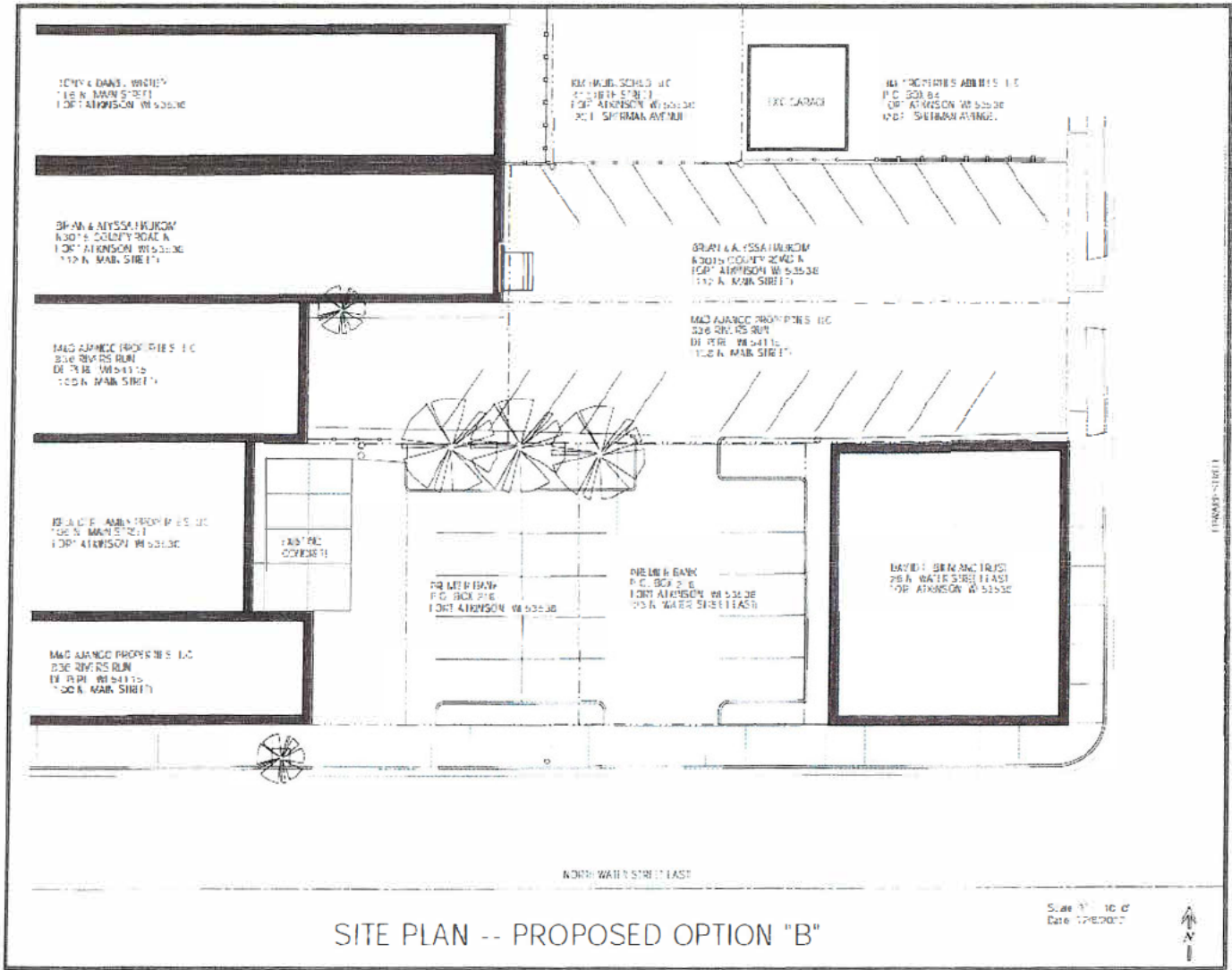


3044: 3-10-2023



**EXHIBIT 1  
PROJECT LOCATION MAP**

PREMIER BANK PARKING STUDY - FORT ATKINSON, WISCONSIN



SITE PLAN -- PROPOSED OPTION "B"



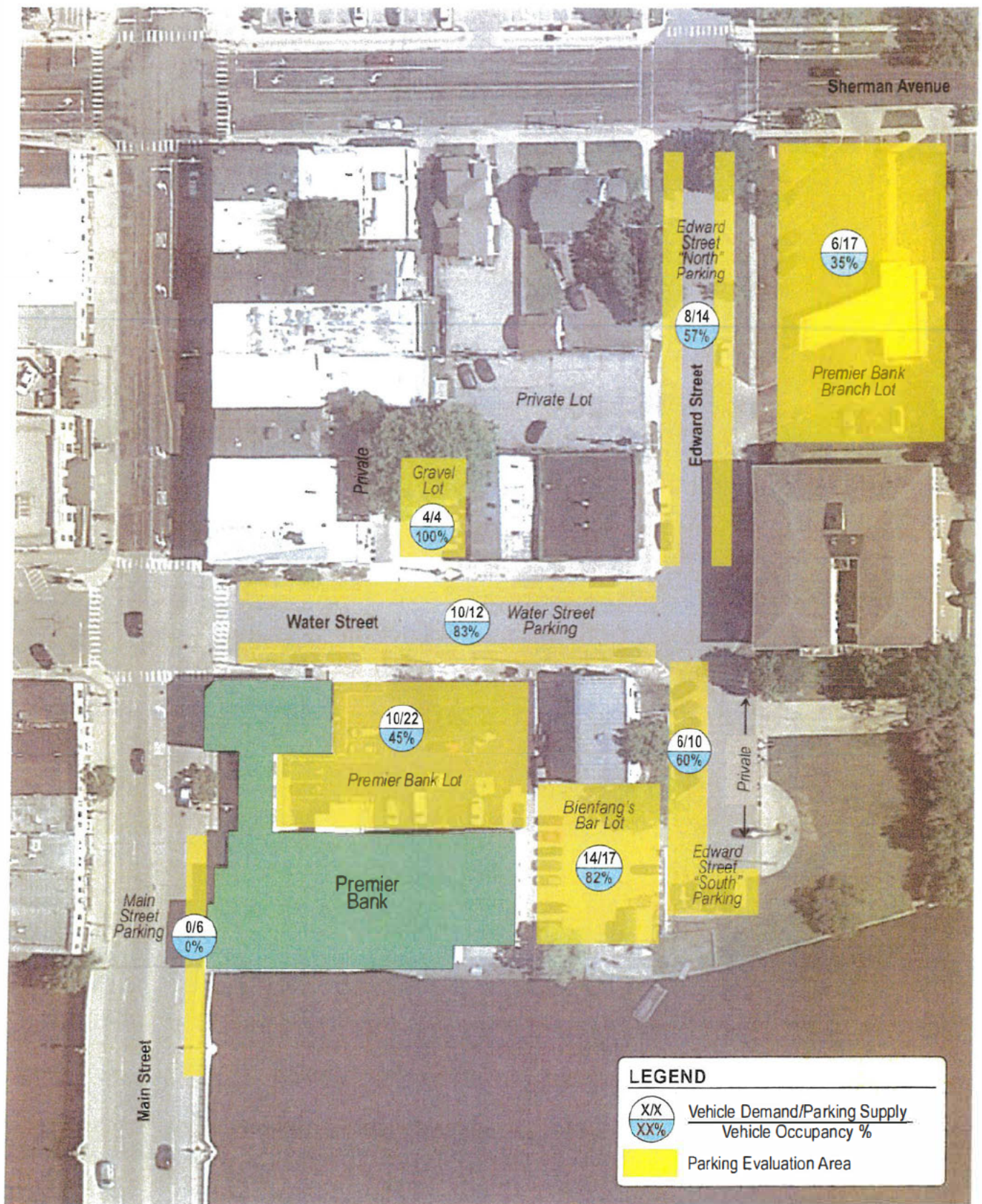
3044: 3-10-2023



NOT TO SCALE

**EXHIBIT 2**  
**PROPOSED PARKING LOT CONCEPTUAL SITE PLAN**

**PREMIER BANK PARKING STUDY - FORT ATKINSON, WISCONSIN**



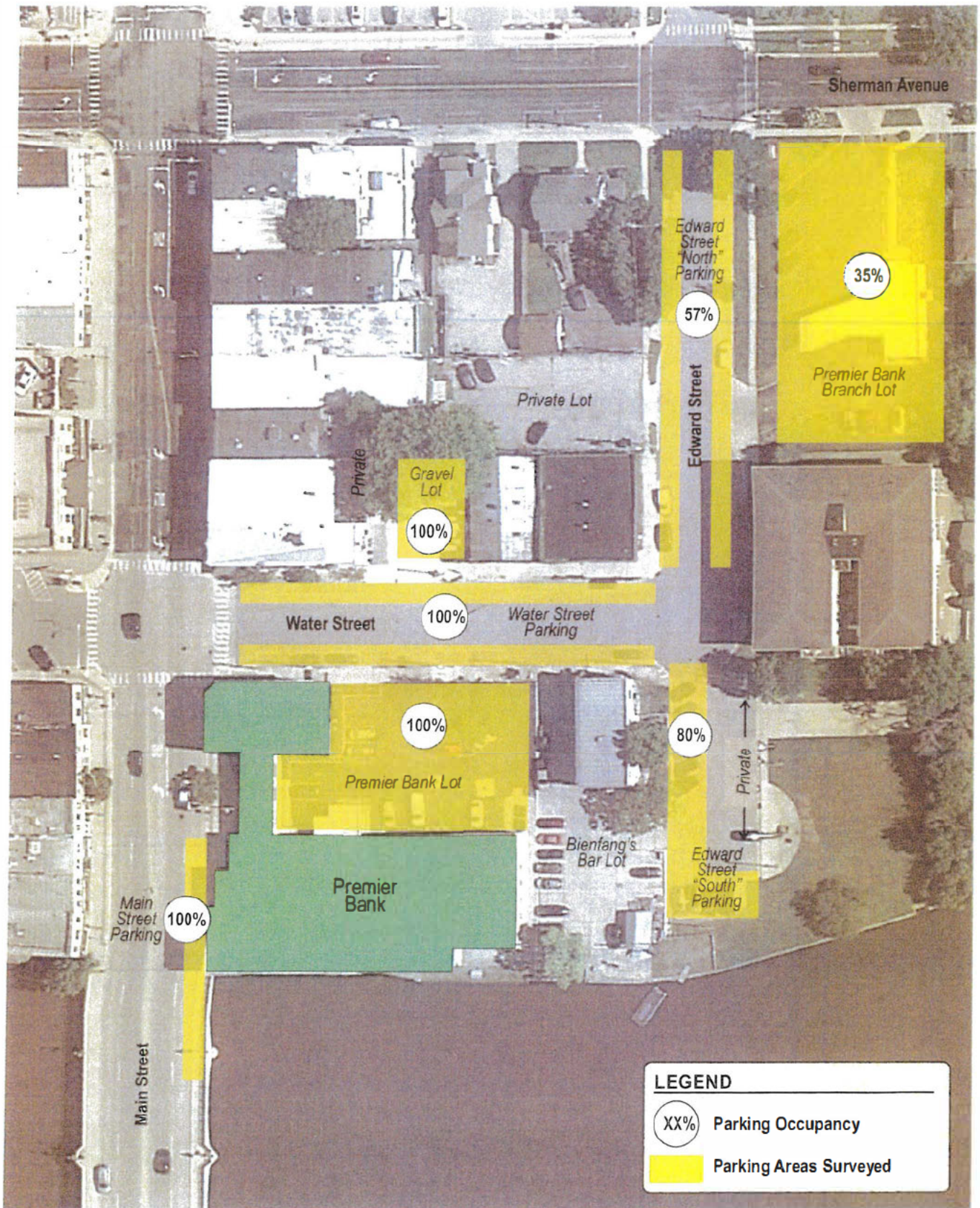
3044: 3-10-2023



NOT TO SCALE

**EXHIBIT 3  
EXISTING VEHICLE OCCUPANCY**

**PREMIER BANK PARKING STUDY - FORT ATKINSON, WISCONSIN**

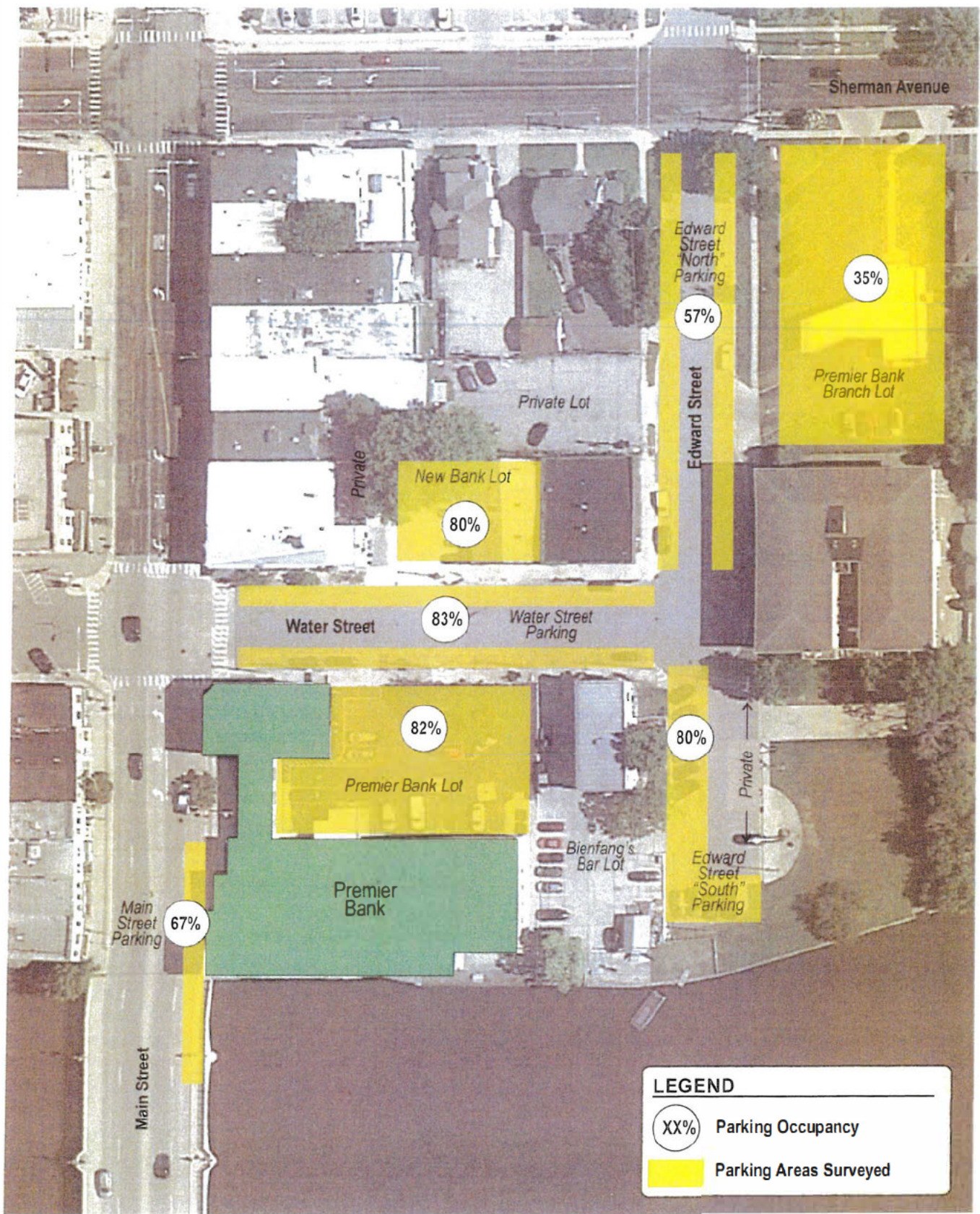


3044: 3-10-2023



NOT TO SCALE

**EXHIBIT 4**  
**FUTURE PEAK PARKING OCCUPANCY**  
**PEAK OPERATIONS AT BANK (ADD 10 STAFF PARKING)**  
**NO BANK PARKING AT BIENFANG'S BAR (SHIFT 12 STAFF PARKING)**  
**PREMIER BANK PARKING STUDY - FORT ATKINSON, WISCONSIN**



**LEGEND**

- XX% Parking Occupancy
- Yellow shaded area Parking Areas Surveyed



3044: 3-10-2023



NOT TO SCALE

**EXHIBIT 5**  
**ALTERNATIVE PEAK PARKING OCCUPANCY - NEW BANK LOT**  
**PEAK OPERATIONS AT BANK (ADD 10 STAFF PARKING)**  
**NO BANK PARKING AT BIENFANG'S BAR (SHIFT 12 STAFF PARKING)**

**PREMIER BANK PARKING STUDY - FORT ATKINSON, WISCONSIN**

# PREMIERBANK PARKING LOT REMODEL

23 N. Water Street East  
Fort Atkinson, WI 53538

VERIFY ALL CONDITIONS AND DIMENSIONS WITH THE  
OWNER AND NOTIFY THE DESIGN ASSURANCE  
ARCHITECTS, INC. OF ANY DISCREPANCIES  
BEFORE TO START.

### DRAWING INDEX

- SP-1 SITE LOCATION & MAPS, RENDERING
- SP-2 EXISTING SITE PLAN
- SP-3 PROPOSED SITE PLAN
- SP-4 LANDSCAPING PLAN
- SP-5 PROPOSED SIGNAGE LOCATION

### PROJECT DESCRIPTION:

REPLACE EXISTING STRUCTURE & EXPAND EXISTING PARKING  
SERVING PREMIERBANK (15) TOTAL PARKING SPACES  
  
INCREASE GREENSPACE BY 674.5 SF (6.4% INCREASE)  
  
ADDITION OF (5) MASONRY PIERS WITH WROUGHT IRON  
FENCE TO MATCH EXISTING MASONRY PIERS LOCATED  
NORTH OF THE SITE AT SHYMAN AVE E SEE FOR 1  
ATKINSON PUBLIC PARKING LOT AT 21.0 N MAIN ST

### EXISTING SITE INFORMATION

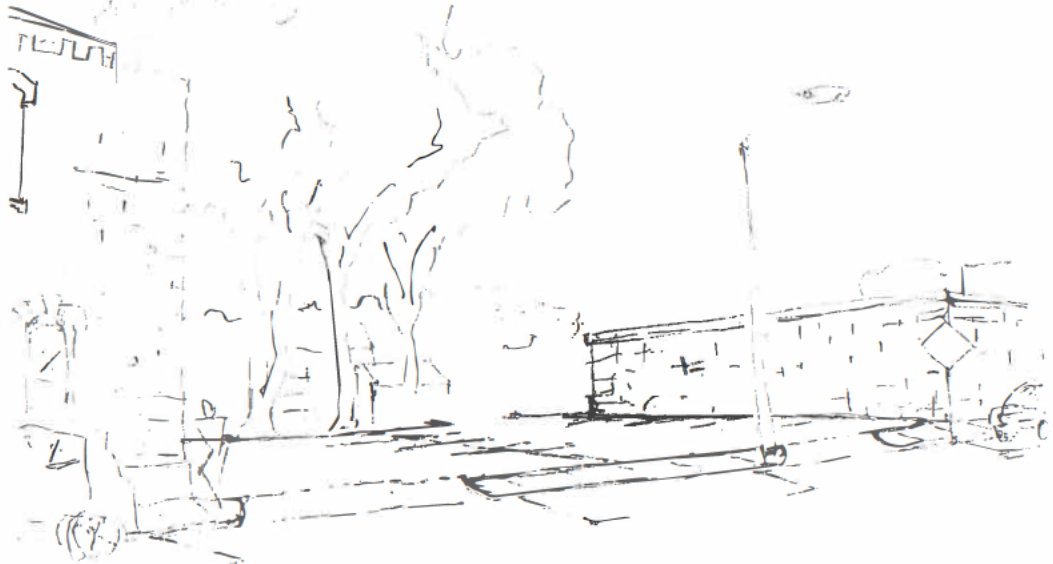
|                         |           |             |
|-------------------------|-----------|-------------|
| SITE AREA               | 5062.5 SF | (0.12 ACRE) |
| BUILDING FOOTPRINT AREA | 2412.5 SF | (47.6%)     |
| PARKING AREA            | 2430.5 SF | (48.1%)     |
| GREEN SPACE AREA        | 264.5 SF  | (5.2%)      |

### PROPOSED SITE INFORMATION

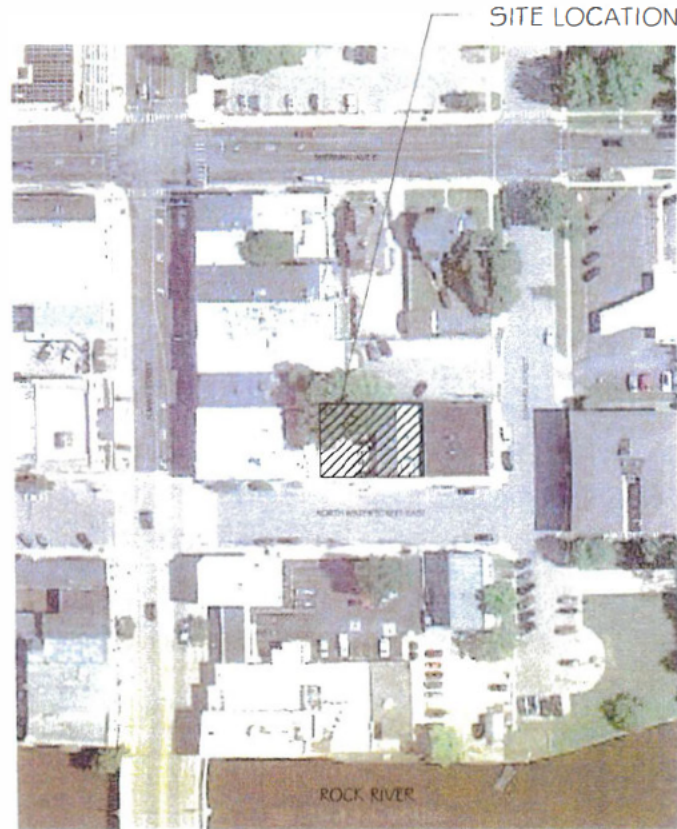
|                         |           |             |
|-------------------------|-----------|-------------|
| SITE AREA               | 5062.5 SF | (0.12 ACRE) |
| BUILDING FOOTPRINT AREA | 0.5 SF    | (0.0%)      |
| PARKING AREA            | 4442.5 SF | (87.7%)     |
| GREEN SPACE AREA        | 619.5 SF  | (12.2%)     |



EXISTING SITE IMAGES  
DATE: 08/11/2023  
DRAWN BY: CLC  
CHECKED BY: TFW



SOUTH PERSPECTIVE RENDERING  
DATE: 08/11/2023  
DRAWN BY: CLC  
CHECKED BY: TFW



SITE LOCATION

ALL DRAWINGS ARE  
1/2 SCALE SHOWN  
  
PRELIMINARY NOT  
FOR CONSTRUCTION

DESIGN ASSURANCE ARCHITECTS, INC. (DAI) 381-3483  
1025 Madison Avenue  
Fort Atkinson, WI

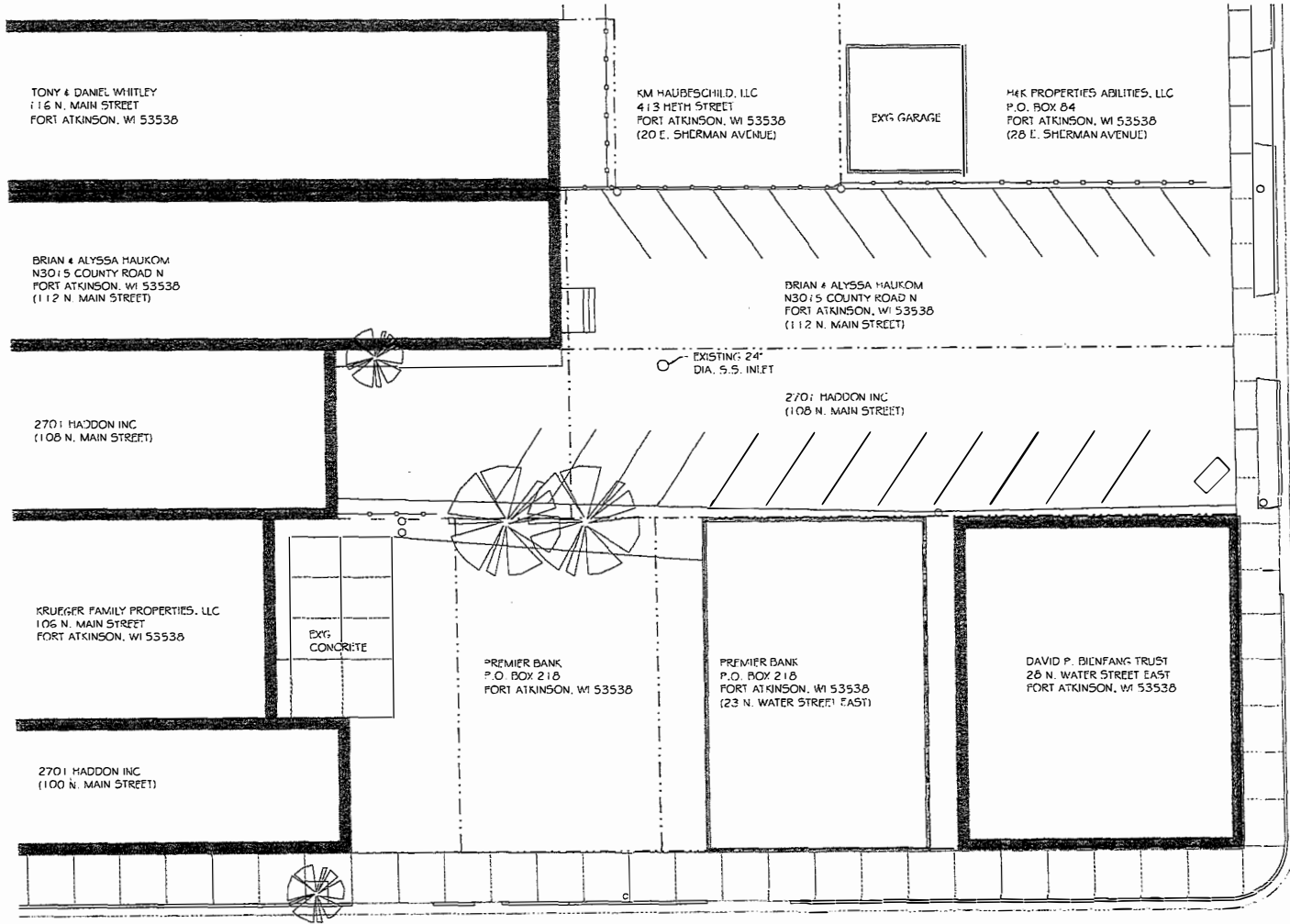
PREMIER BANK PARKING LOT  
23 N. Water Street East  
Fort Atkinson, WI 53538

| DRAWING NAMES |            |
|---------------|------------|
| SITE #10      |            |
|               |            |
|               |            |
|               |            |
|               |            |
|               |            |
|               |            |
|               |            |
|               |            |
| REVISIONS     |            |
| 1             | 08/11/2023 |
|               |            |
|               |            |
| PROJECT DATA  |            |
| DATE          | 08/11/2023 |
| DRAWN BY      | CLC        |
| CHECKED BY    | TFW        |
| SHEET NO.     |            |

SP-1

VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START

ALL DRAWINGS ARE 1/2 SCALE SHOWN  
PRELIMINARY NOT FOR CONSTRUCTION



NORTH WATER STREET EAST

EDWARD STREET



EXISTING SITE PLAN  
SCALE: AS SHOWN  
DATE: 9/13/2023  
DRAWN BY: CL, CJ  
CHECKED BY: P.W.  
SHEET 110

**Design Alliance Architects, Inc.**  
1032 Madison Avenue  
Fort Atkinson, WI  
(920) 563-1402

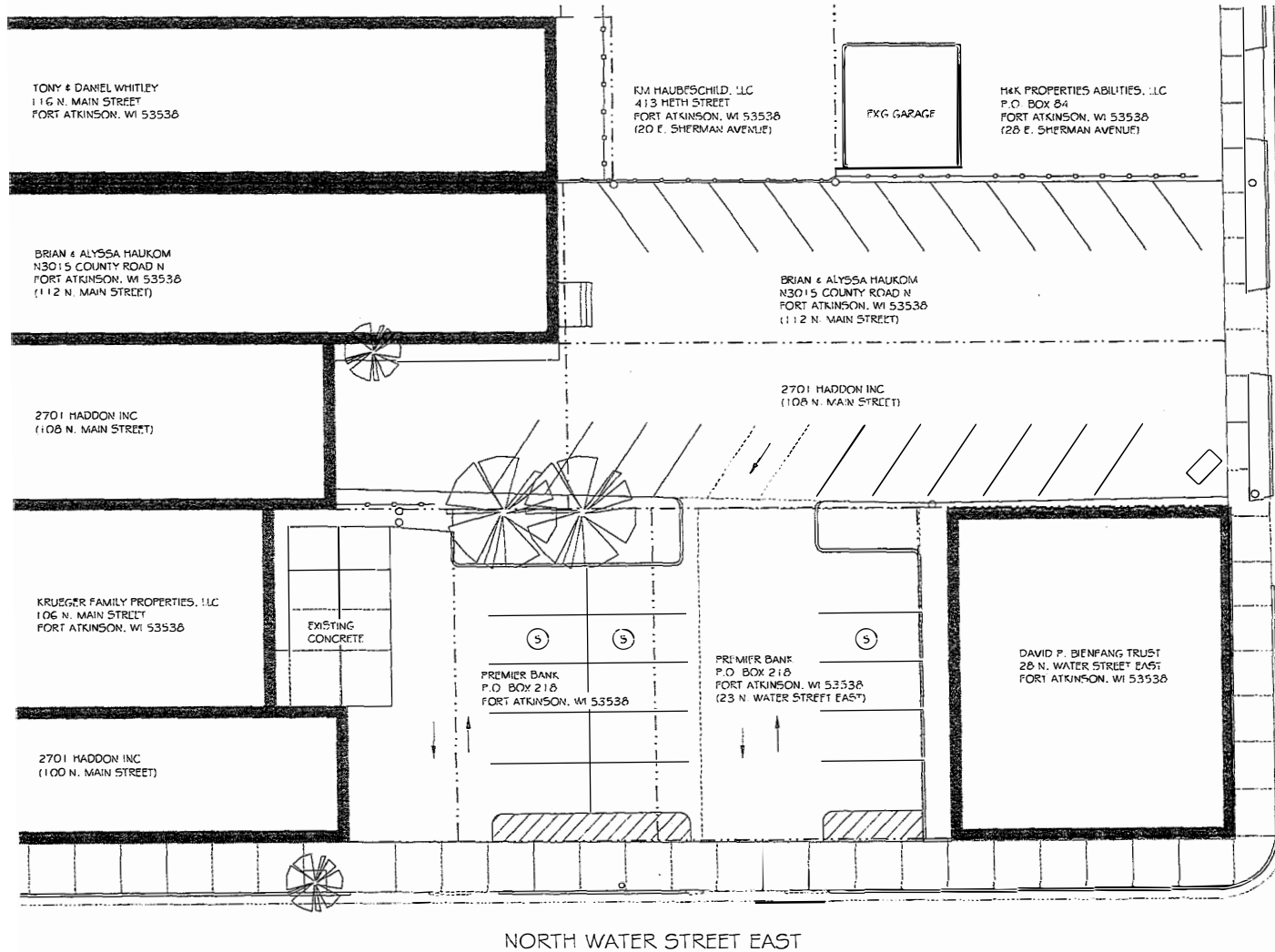
**PREMIER BANK PARKING LOT**  
23 N. Water Street East  
Fort Atkinson, WI 53538

| DRAWING NAMES      |           |
|--------------------|-----------|
| EXISTING SITE PLAN |           |
|                    |           |
|                    |           |
|                    |           |
| REVISIONS          |           |
| 1                  | 6/28/2024 |
|                    |           |
|                    |           |
| PROJECT DATA       |           |
| DATE:              | 9/13/2023 |
| DRAWN BY:          | CL, CJ    |
| CHECKED BY:        | P.W.      |
| SHEET 110          |           |
| SP-2               |           |

2

VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START

ALL DRAWINGS ARE 1/2" SCALE SHOWN  
PRELIMINARY NOT FOR CONSTRUCTION



Design Alliance Architects, Inc.  
1003 Madison Avenue  
FORT ATKINSON, WI  
(608) 568-1400

PREMIER BANK PARKING LOT  
23 N. Water Street East  
Fort Atkinson, WI 53536

| DRAWING NAMES      |            |
|--------------------|------------|
| PROPOSED SITE PLAN |            |
|                    |            |
|                    |            |
| REVISIONS          |            |
| 1                  | 02/20/24   |
|                    |            |
|                    |            |
| PROJECT DATA       |            |
| DATE:              | 01/30/2023 |
| DRAWN BY:          | CL, CL     |
| CHECKED BY:        | P.W.       |
| SHEET NO.          | SP-3       |

PROPOSED SITE PLAN  
SCALE: 1" = 16' 0"  
2023/07/14/2023  
DATE: AUGUST 12, 2022

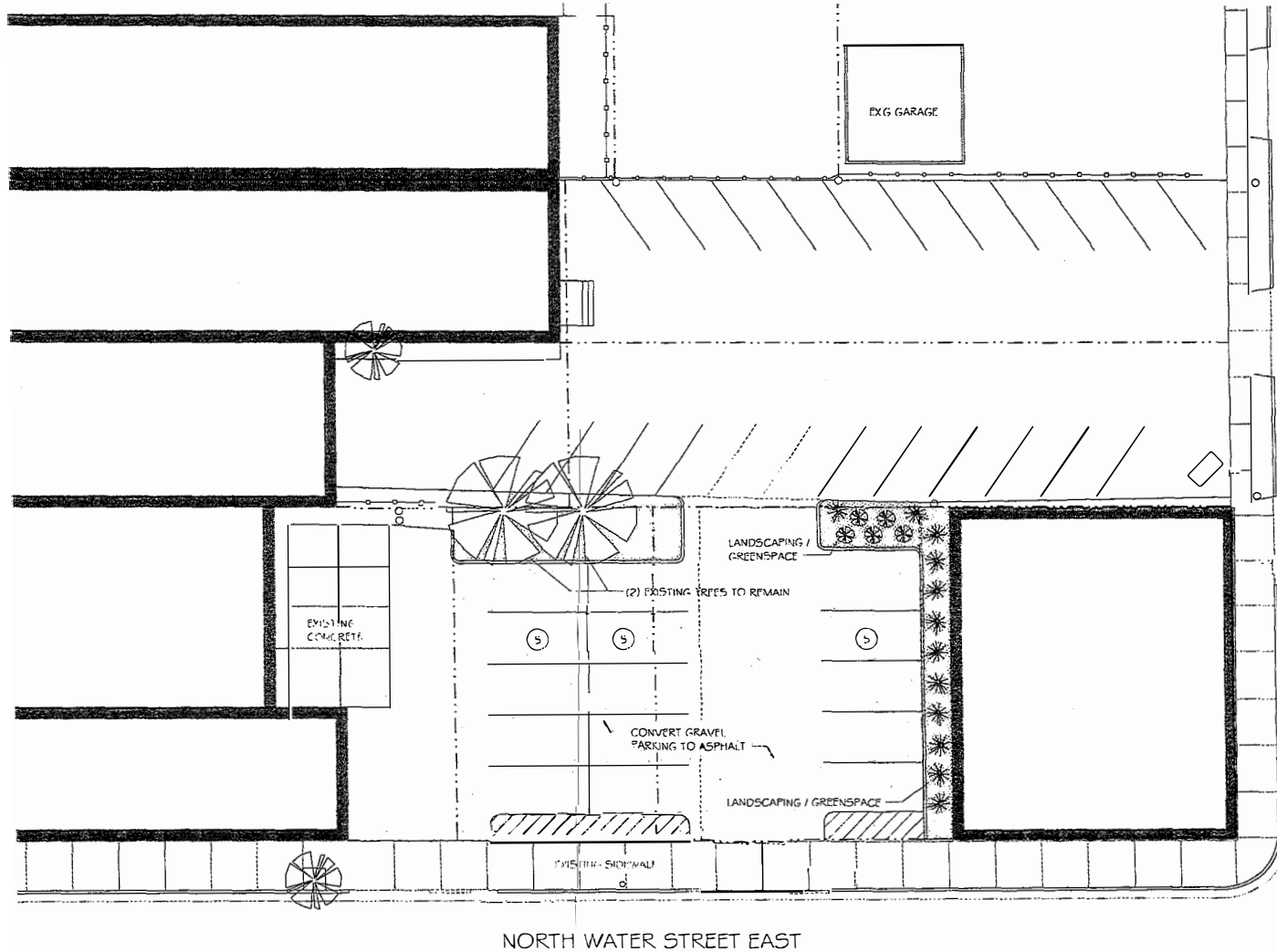


W

VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START

ALL DRAWINGS ARE 1/2" SCALE SHOWN

PRELIMINARY NOT FOR CONSTRUCTION



EDWARD STREET

NORTH WATER STREET EAST

**Design Alliance Architects, Inc.**  
 1000 Madison Avenue  
 Fort Atkinson, WI  
 (920) 381-1104

**PREMIER BANK PARKING LOT**  
 23 N. Water Street East  
 Fort Atkinson, WI 53538

DRAWING NAMES

PROPOSED SITE PLAN

REVISIONS

5/28/2024

PROJECT DATA  
 DATE: 9/13/2023  
 DRAWN BY: CL, CJ  
 CHECKED BY: F.W.

SHEET NO.

SP-4

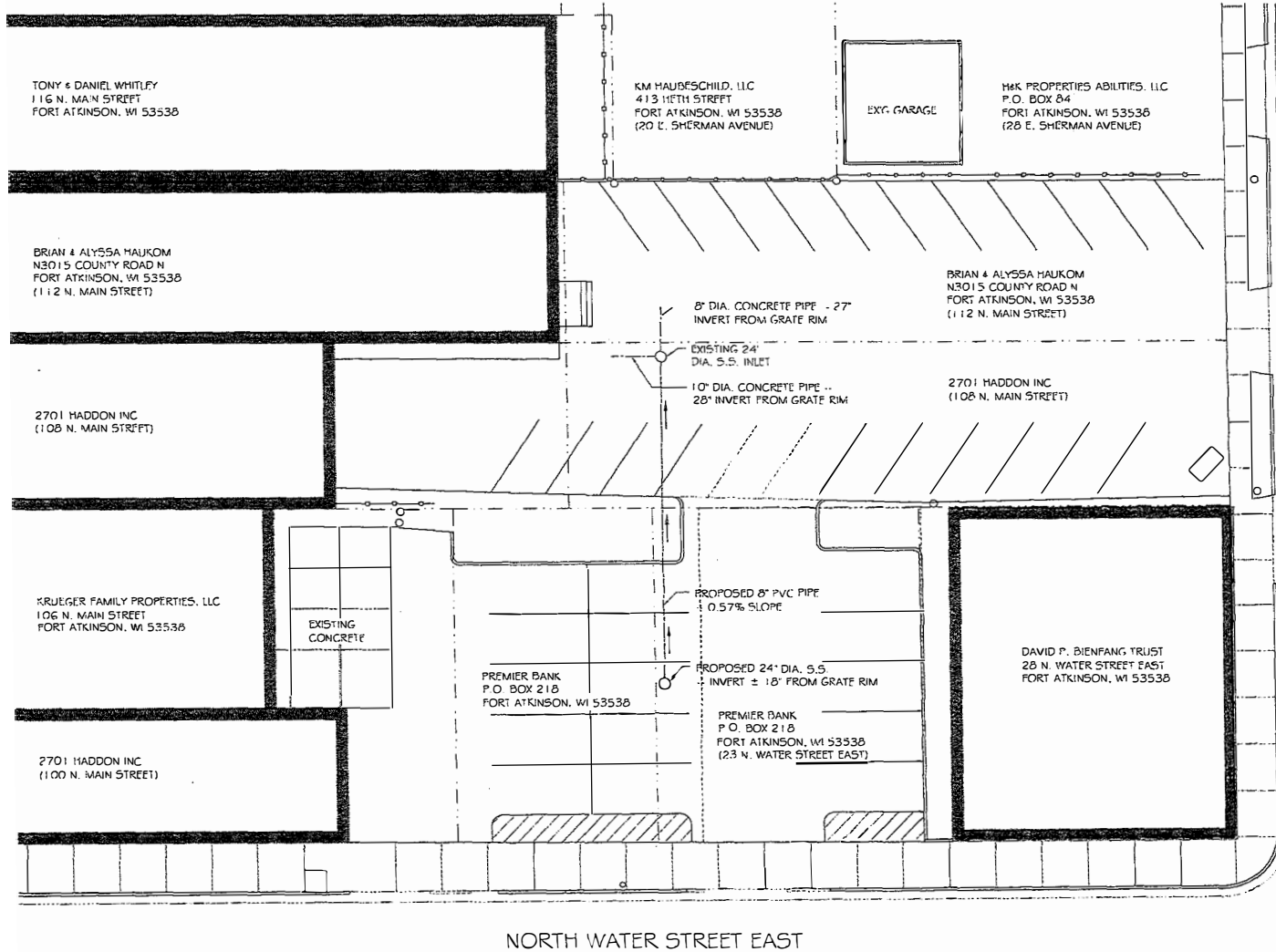
LANDSCAPE PLAN  
 SCALE: 1" = 10' - 10'  
 2023/09/13 DATE PLOTTED: 9/13/2023 12:00 PM  
 PLOT BY: CL, CJ

7

VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START

ALL DRAWINGS ARE 1/2" SCALE SHOWN

PRELIMINARY NOT FOR CONSTRUCTION



EDWARD STREET

NORTH WATER STREET EAST



PROPOSED STORM SEWER  
SCALE: 1" = 12'-0"  
DESIGNED BY: DAVID P. BIENFANG, P.E.  
DATE: 04/26/17 2022

Design Alliance Architects, Inc.  
 100 Madison Avenue  
 Fort Atkinson, WI  
 (920) 583-1404

PREMIER BANK PARKING LOT  
 23 N. Water Street East  
 Fort Atkinson, WI 53538

DRAWING NAMES  
 PROPOSED SITE PLAN

REVISIONS  
 1 6/28/2024

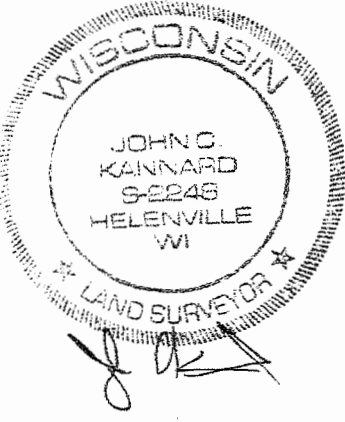
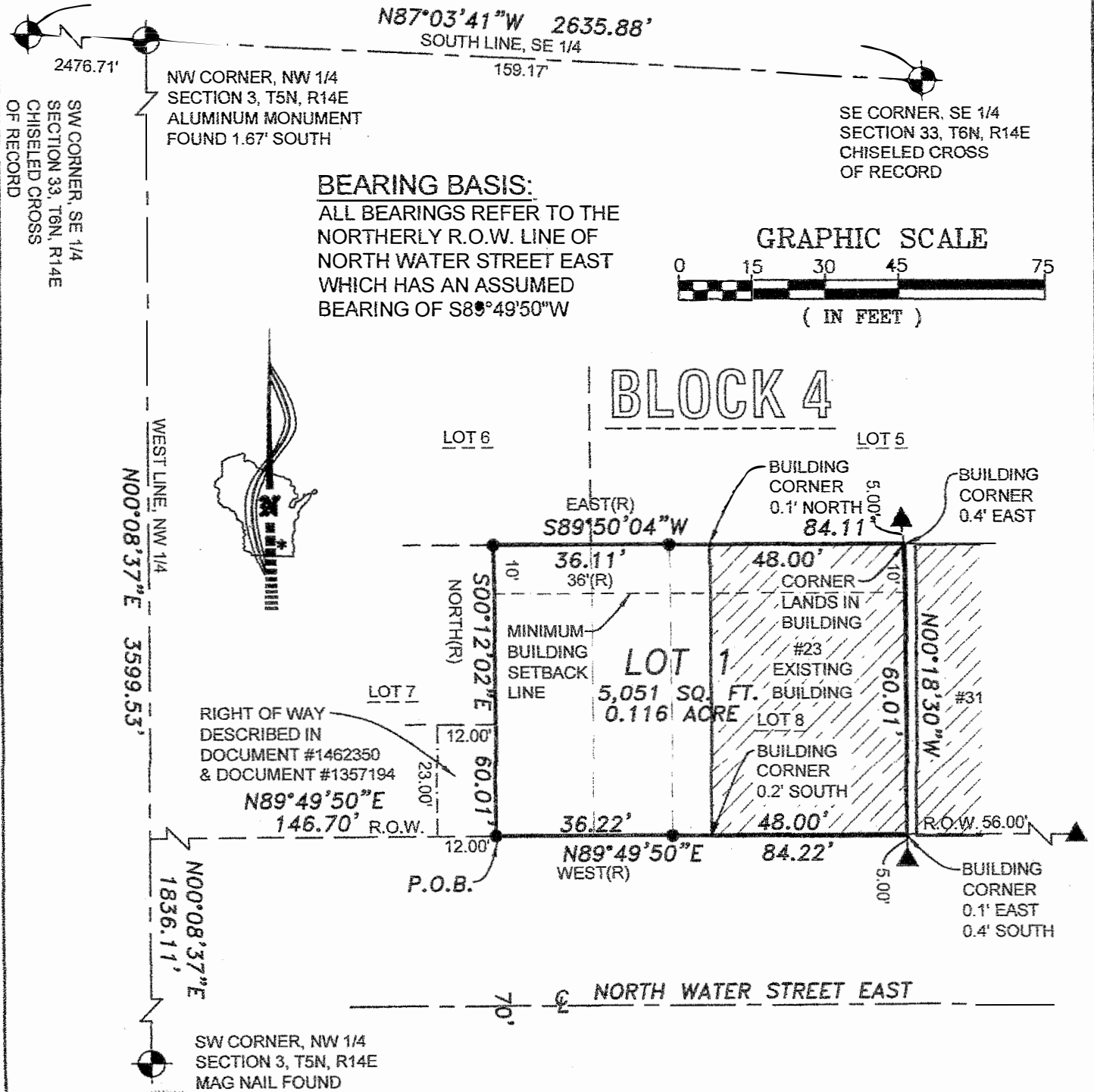
PROJECT DATA  
 DATE: 9/13/2023  
 DRAWN BY: CL, CJ  
 CHECKED BY: P.W.  
 SHEET NO.

SP-5

5

**CERTIFIED SURVEY MAP No. \_\_\_\_\_**

BEING A PART OF LOTS 7 AND 8 OF BLOCK 4 OF THE ORIGINAL PLAT OF FORT ATKINSON, LOCATED IN GOVERNMENT LOT 4 OF SECTION 3, T5N, R14E, CITY OF FORT ATKINSON, JEFFERSON COUNTY, WISCONSIN.



**OWNER:**  
Premier Bank  
Attn: Sherry McKee  
P.O. Box 218  
Fort Atkinson, WI 53538  
920 563-6616  
smckee@bankwithpremier.com

- LEGEND**
- 3/4" IRON REBAR FOUND
  - ▲ MAG NAIL FOUND
  - (R) RECORDED AS
  - ⊙ SECTION CORNER FOUND AS NOTED

**SOUTHWEST**  
SURVEYING & ASSOCIATES, Inc.

P.O. BOX K, PALMYRA, WI. 53156  
262-495-4910  
920-674-4884

JOB No.: P-222115A  
DATE: APRIL 11, 2023  
SHEET 1 OF 2

**CERTIFIED SURVEY MAP No. \_\_\_\_\_**

BEING A PART OF LOTS 7 AND 8 OF BLOCK 4 OF THE ORIGINAL PLAT OF FORT ATKINSON,  
LOCATED IN GOVERNMENT LOT 4 OF SECTION 3, T5N, R14E, CITY OF FORT ATKINSON,  
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 Lots 7 and 8 of Block 4 of the Original Plat of Fort Atkinson, located in Government Lot 4 of Section 3, T5N, R14E, City of Fort Atkinson, Jefferson County, Wisconsin, bounded and described as follows:

Commencing at the Mag Nail Monument that marks the Southwest corner of the NW 1/4 of said Section 3; Thence N00°08'37"E, along the West line of said NW 1/4, a distance of 1836.11 feet; Thence N89°49'50"E, along the Northerly Right of Way (R.O.W.) line of North Water Street East and said line extended, a distance of 146.70 feet, to a Found 3/4" Iron Rebar that marks the POINT OF BEGINNING of the lands to be described; Thence continue N89°49'50"E, along said Northerly R.O.W. line, a distance of 84.22 feet; Thence N00°18'30"W, a distance of 60.01 feet, to the Northerly line of Lot 8; Thence S89°50'04"W, along the North line of Lots 7 and 8, a distance of 84.11 feet, to a Found 3/4" Iron Rebar; Thence S00°12'02"E, a distance of 60.01 feet, to the POINT OF BEGINNING, containing 5,051 square feet or 0.116 acre 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 Premier Bank, 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, and the subdivision regulations of the City of Fort Atkinson in surveying and mapping same.

Certified this 11th day of April, 2023

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



**CITY OF FORT ATKINSON APPROVAL:**

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

Dated this \_\_\_\_ day of \_\_\_\_\_, 2023

\_\_\_\_\_  
Michelle Ebbert, City Clerk



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Jedidiah Draeger, Director of Neighborhood and Building Services

**RE:** First reading of an ordinance relating to amendments to various sections of the Zoning Ordinance, Chapter 15 of the City of Fort Atkinson Code of General Ordinances, relating to the review and approval of Signs (Draeger, Director of Neighborhood and Building Services)

---

### BACKGROUND

The City of Fort Atkinson Zoning Ordinance Section 15.10.30 outlines the process for Zoning Text Amendments that reflects Wisconsin State Statutes Section 62.23(7)(d). Initiation of the request for amendments can come from a member of the public, Plan Commission, City Council, or City staff. This process requires an application (the proposed amendments), a public hearing before the Plan Commission, and action by both the Plan Commission and City Council.

The City completed a comprehensive Zoning Ordinance rewrite in 2020. Since adoption, City staff have applied the ordinance to all applicable projects and processes and find it is functioning well in advancing community goals, implementing the Comprehensive Plan, and providing clear direction and procedures for individual applications. As with any ordinance, refinements are necessary over time.

### DISCUSSION

City staff have prepared the attached summary in the Plan Commission memo of proposed Zoning Text Amendments focused on Article IX: Signage. The proposed amendments would shift review and approval of Permanent Business Signs and Optional Miscellaneous Signs from the Plan Commission to administrative staff review, while retaining the existing Plan Commission review and approval process for Electronic Message Signs and signage located within the Downtown Historic Mixed Use (DHMU) zoning district.

The proposed changes are based on the recognition that Plan Commission review of many sign types is an additional step, which may delay a property or business owner's sign project. Before Plan Commission consideration, staff have already worked with applicants to ensure full compliance with ordinance standards.

As a result, Plan Commission review typically does not add new conditions or information once the ordinance requirements are met. In addition, the 2015 U.S. Supreme Court decision in Reed v. Gilbert requires sign regulations to be content-neutral, limiting review to objective factors such as location, materials, and configuration. When a sign meets these standards, the Plan Commission has no authority to further regulate its design or content.

**FINANCIAL ANALYSIS**

The proposed Ordinance Amendments are not expected to have a direct financial impact to the City. However, it is anticipated to improve the efficiency of the review and approval process for many sign applications. Streamlining this process may help reduce permitting timelines and support new businesses as they work to open and begin operations.

**RECOMMENDATION**

The Ordinance Committee met on February 3rd and recommended the City Council approve the proposed Zoning Text Amendments. A Public Hearing relating to the ordinance amendments was held at the Plan Commission meeting on March 10th without participation.

City staff and the Plan Commission recommend that the City Council hold the first reading of the ordinance and direct the City Manager to prepare the ordinance for a second reading at the meeting on April 9, 2026.

**ATTACHMENTS**

- 1. Plan Commission Memo Zoning Ordinance Changes
- 2. DRAFT ORDINANCE NO\_Sign approvals 3.10.26



## Zoning Text Amendment REPORT TO THE PLAN COMMISSION

**DATE:** March 10, 2026  
**PROPERTY ADDRESS:** N/A  
**PARCEL NUMBER:** N/A  
**OWNER:** N/A  
**APPLICANT:** City of Fort Atkinson

**FILE NUMBER:** ZTA-2026-01  
**EXISTING ZONING:** N/A  
**PROPOSED ZONING:** N/A  
**EXISTING LAND USE:** N/A  
**REQUESTED USES:** N/A

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### BACKGROUND

The City of Fort Atkinson Zoning Ordinance Section 15.10.30 outlines the process for Zoning Text Amendments that reflects Wisconsin State Statutes Section 62.23(7)(d). Initiation of the request for amendments can come from a member of the public, Plan Commission, City Council, or City staff. This process requires an application (the proposed amendments), a public hearing before the Plan Commission, and action by both the Plan Commission and City Council.

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### REQUEST OVERVIEW

The City completed a comprehensive Zoning Ordinance rewrite in 2020. Since adoption, City staff have applied the ordinance to all applicable projects and processes and find it is functioning well in advancing community goals, implementing the Comprehensive Plan, and providing clear direction and procedures for individual applications. As with any ordinance, refinements are necessary over time.

A Public Hearing is required for Zoning Text Amendments and has been adequately noticed per state statute requirements.

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### DISCUSSION

City staff have prepared the attached summary of proposed Zoning Text Amendments focused on Article IX: Signage. The proposed amendments would shift review and approval of Permanent Business Signs and Optional Miscellaneous Signs from the Plan Commission to administrative staff review, while retaining the existing Plan Commission review and approval process for Electronic Message Signs and signage located within the Downtown Historic Mixed Use (DHMU) zoning district.

The proposed changes are based on the recognition that Plan Commission review of many sign

types is an additional step, which may delay a property or business owner's sign project. Prior to Plan Commission consideration, staff has already worked with applicants to ensure full compliance with ordinance standards. As a result, Plan Commission review typically does not add new conditions or information once the ordinance requirements are met. In addition, the 2015 U.S. Supreme Court decision in *Reed v. Gilbert* requires sign regulations to be content-neutral, limiting review to objective factors such as location, materials, and configuration. When a sign meets these standards, the Plan Commission has no authority to further regulate its design or content.

The City intends to retain additional oversight where warranted. The DHMU zoning district is a highly sensitive area, and Electronic Message Signs have the potential to create external impacts on surrounding properties. Accordingly, the proposed amendments preserve the current Plan Commission review process for these sign types.

This approach is consistent with practices adopted by many Wisconsin communities to streamline sign permitting, reduce approval timelines, and promote a more business-friendly regulatory process while limiting discretionary review. The proposed amendments will result in a more efficient sign approval process, reduced potential for legal challenges, improved administrative efficiency, and continued heightened review for sensitive areas and unique sign types.

As the ordinance has been administered over the past several years, these amendments were identified as necessary improvements to the application and administration of the City's signage standards. City staff have also consulted with Vandewalle & Associates, the consultant who assisted with drafting the Zoning Ordinance, to ensure the proposed changes are consistent with the overall ordinance framework.

The primary policy change associated with the amendments is the shift of sign permit review and approval authority from the Plan Commission to City staff for most sign types, while retaining Plan Commission review for signage within the DHMU zoning district and for Electronic Message Signs. The City's Management Team has reviewed the proposed amendments, and all comments have been incorporated.

The Ordinance Committee recommended the City Council approve the proposed Zoning Text Amendments on February 3, 2026.

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**RECOMMENDATION**

City staff recommends the Plan Commission recommend the City Council approve the proposed Zoning Text Amendments as outlined in the attached Draft Ordinance.

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**ATTACHMENTS**

1. DRAFT ORDINANCE NO\_Sign approvals 3.10.26

ORDINANCE NO. \_\_\_\_

AN ORDINANCE TO AMEND SECTIONS OF CHAPTER 15 (ZONING CODE) OF THE CITY OF FORT ATKINSON CODE OF GENERAL ORDINANCES RELATING TO THE APPROVAL OF SIGNS LOCATED OUTSIDE THE DOWNTOWN HISTORIC MIXED USE (DHMU) DISTRICT

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

**Section 1.** Amends Sec. 15.09.05(1)(b)4. of the Zoning Ordinance to read as follows:

- “(4) Marquee Sign. A type of On-Building Sign that is mounted to a permanent roof-like structure that projects out from the exterior wall of a structure and shelters the entrance and/or entrance approaches to a building.
- (a) Sign copy shall be horizontally and vertically centered on the face(s) of the marquee.
  - (b) Marquee Signs must be finished and enclosed on both the top and bottom of the sign between the back of the sign face and the building façade.
  - (c) Marquee Signs must be a minimum of 6 feet deep and 16 feet wide.
  - (d) Letters displayed on a Marquee Sign must be a minimum of 10 inches tall.
  - ~~(e) Marquee Signs may only be approved through the Conditional Use Permit process. See Section 15.10.32”~~

**Section 2.** Amends Sec. 15.09.05(1)(d)4. of the Zoning Ordinance to read as follows:

- “(4) Order Board Sign. A type of Daily Notice Sign used only in conjunction with drivethrough or drive-in establishments.
- ~~(a) Order Board Signs shall require a Conditional Use Permit. The Conditional Use Permit application for a Drive-Through Sign is typically reviewed as a component of a Conditional Use Permit application for an In-Vehicle Sales and Service land use, but a Drive-Through Sign may be applied for as a distinct Conditional Use Permit.~~
  - ~~(b)~~(a) Order Board Signs shall be freestanding or mounted on the exterior wall of the building containing the use.
  - ~~(e)~~(b) Freestanding two-way microphone/speaker devices shall not count toward the maximum permitted area of the Order Board Sign.
  - ~~(d)~~(c) Order Board Sign audio components shall meet the noise standards set forth in Section 15.06.31 of the Zoning Ordinance.
  - ~~(e)~~(d) Order Board Sign lighting components shall meet the exterior lighting standards set forth in Section 15.06.20 of the Zoning Ordinance.”

**Section 3.** Creates Section 15.09.08(a)2. of the Zoning Ordinance to read as follows:

- “(a) Electronic Message Signs shall be permitted only with a nonresidential land use.
1. No more than one Electronic Message Sign shall be permitted per site.
  2. Electronic Message Signs may only be approved with a sign permit reviewed and approved by the Plan Commission.”

**Section 4.** Amends Section 15.09.11, Figure 15.09.11(1) of the Zoning Ordinance to read as follows:

“Figure 15.09.11(1): Permanent Business Sign Group

- A. Freestanding Sign Category  
Sign Permit Required and Approver Column  
Yes: For each new sign. P.C.City Staff approval.
- B. On-Building Sign Category  
Sign Permit Required and Approver Column  
Yes: For each new sign. P.C.City Staff approval.
- C. Pedestrian Sign Category  
Sign Permit Required and Approver Column  
Yes: For each new sign. P.C.City Staff approval.
- D. Daily Notice Sign Category 3. and 4.  
Sign Permit Required and Approver Column  
Yes: For each new sign. P.C.City Staff approval.  
  
Sign Area & Height Maximums for Zoning Districts column  
DHMU<sup>15</sup>

Footnotes Containing Additional Development Requirements:

- 4 Electronic Message Signs (of up to 50%of the sign area) are permitted for this Sign Type in nonresidential districts and requires Plan Commission approval prior to the issuance of a sign permit. See Section 15.09.08.
- 15 Any sign permitted within the DHMU zoning district shall require review and approval by the Plan Commission.”

Figure 15.09.11(1): Permanent Business Sign Group <sup>2</sup>

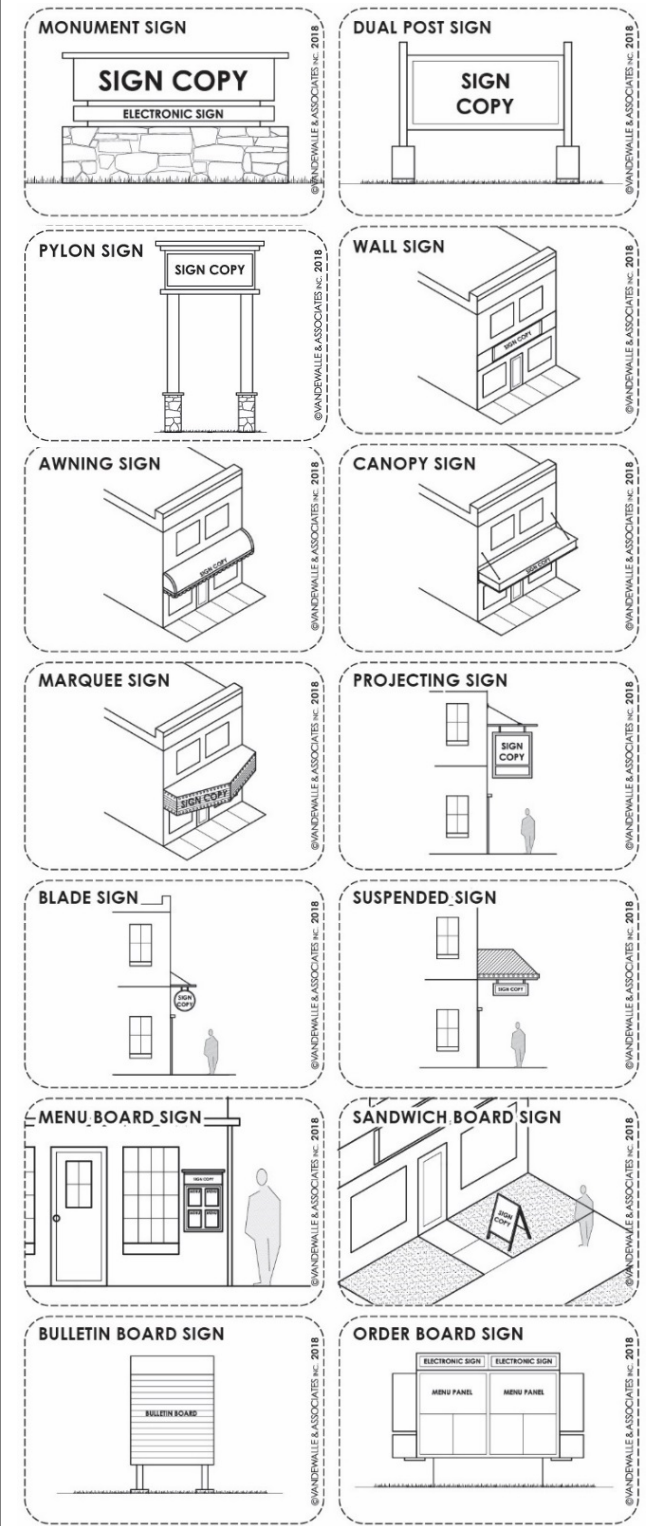
| Sign Categories & Sign Types   | Sign Permit Required and Approver  | Number of Signs Allowed   | Sign Locations Allowed  | Sign Face Materials Allowed                                      | Sign Lighting Allowed  | Sign Area Formula   | Sign Area & Height Maximums for Zoning Districts: |  |   |             |  |  |
|--|--|---|---|--|--|---|---|--|---|-------------|--|--|
|  |  |   |   |  |  |   | 1 & 2 Family Residential                          | Multi-Family Residential                                 | Non-Residential and Mixed-Use                 | Downtown    |  |  |
| <b>A. Freestanding Sign Category</b> <sup>1,2</sup> Choose 1 of the following Sign Types.  |  |   |   |  |  |   |   |  |   |             |  |  |
| 1. Monument Sign <sup>1,2,4,6,11,13</sup>  | Yes:<br>For each new sign.<br>P.C.-City Staff approval.  | 1 sign per street frontage, plus 1 sign per lot with more than 200 feet of total street frontage                        | 15' from the street curb face. <sup>9</sup>   | Durable, all-weather materials in all districts. <sup>9,11</sup> | Standard. <sup>5,13</sup>  | 1 sf of sign area per 1 ft of street frontage or on-site parking    | 1 & 2 Family Residential                          | Multi-Family Residential                                 | Non-Residential and Mixed-Use                 | Downtown    |  |  |
| RH-35, SR-2, SR-3, SR-5, SR-7, MH-7, DR-8, TF-10   |  |   |   |  |  |   | MRL-8, MRM-12, MRH-30                             | I, NMU, UMU, SMU, DPMU, BP, LI, MI, HI, IOS, IOC, AO, EX | DHMU <sup>15</sup>                            |             |  |  |
| 2. Dual-Post Sign <sup>1,2,4,11,13</sup>   |  |   |   |  |  |   | Not allowed                                       | 50 sf area per frontage<br>6 ft height limit             | 128 sf area per frontage<br>6 ft height limit | Not allowed |  |  |
| 3. Pylon Sign <sup>2,6,14</sup>  | Not allowed  | Not allowed   | 128 sf area 18 ft height limit <sup>14</sup>  | Not allowed  |  |   |   |  |   |             |  |  |
| <b>B. On-Building Sign Category</b> <sup>1,2</sup> Choose 1 of the following Sign Types. Note: All On-Building Signs on the same building façade must be the same Type of Sign (1-5), below. |  |   |   |  |  |   |   |  |   |             |  |  |
| 1. Wall Sign <sup>1,2,6,7,8,12,13</sup>  | Yes:<br>For each new sign.<br>P.C.-City Staff approval.  | 1 sign per exterior wall not abutting residential use or zoning district, plus one sign per customer entry <sup>3</sup> | Sign shall not extend above parapet or fascia. Minimum overhang rules. <sup>8,9</sup> Sign may not project within 2 feet of curb    | Durable, all-weather materials in all districts.                 | Standard <sup>12,13</sup><br>Gooseneck.<br>Backlit,gooseneck <sup>13</sup><br>Standard. <sup>5</sup> | 1 sf of sign area per 1 ft of building façade length <sup>3,7</sup> | 1 & 2 Family Residential                          | Multi-Family Residential                                 | Non-Residential and Mixed-Use                 | Downtown    |  |  |
| 2. Awning Sign <sup>1,2,8</sup>  |  |   |   |  |  |   | Not allowed                                       | 128 sf area  | Per formula.                                  |             |  |  |
| 3. Canopy Sign <sup>1,2,8</sup>  |  |   |   |  |  |   | Not allowed                                       | 40 sf area   | 60 sf area                                    | 40 sf area  |  |  |
| 4. Marquee Sign <sup>1,2,8</sup>   |  |   |   |  |  |   | Not allowed                                       | Not allowed  | 128 sf area                                   |             |  |  |
| 5. Projecting Sign <sup>1,2,8</sup>  |  |   |   |  |  |   | Not allowed                                       |  |   |             |  |  |
| <b>C. Pedestrian Sign Category</b> <sup>1,2</sup> Choose 1 of the following Sign Types. Note: All Pedestrian Signs on the same building façade must be the same Type of Sign (1-2), below.   |  |   |   |  |  |   |   |  |   |             |  |  |
| 1. Blade Sign <sup>1,2,8</sup>   | Yes:<br>For each new sign.<br>P.C.-City Staff approval.  | 1 for each customer entrance.   | Minimum overhang rules. <sup>8,9</sup>  | Durable, all-weather materials in all districts.                 | Gooseneck.   | None. Use max area.   | 1 & 2 Family Residential                          | Multi-Family Residential                                 | Non-Residential and Mixed-Use                 | Downtown    |  |  |
| 2. Suspended Sign <sup>1,2,8</sup>   |  |   |   |  |  |   | Not allowed                                       | 16 sf area   | 10 sf area                                    | 10 sf area  |  |  |
| <b>D. Daily Notice Sign Category</b> <sup>1,2</sup>  |  |   |   |  |  |   |   |  |   |             |  |  |
| 1. Menu Board Sign <sup>1,2</sup>  | Yes:<br>For each new sign. City Staff approval.<br>Yes:<br>For each new sign.<br>P.C.-City Staff approval. | 1 for each business.  | Within 10 ft of customer entrance. <sup>9,12</sup><br>15' from the street curb face. <sup>9,12</sup><br>Drive-thru <sup>10,12</sup> | Durable, all-weather materials in all districts.                 | Internal.<br>Ambient only.<br>Internal.<br>Standard. <sup>5</sup>                                    | None. Use max area.   | 1 & 2 Family Residential                          | Multi-Family Residential                                 | Non-Residential and Mixed-Use                 | Downtown    |  |  |
| 2. Sandwich Board Sign <sup>1,2</sup>  |  |   |   |  |  |   | Not allowed                                       | 8 sf area  | 6 sf area / 3 ft height / 2 ft width          |             |  |  |
| 3. Bulletin Board Sign <sup>1,2</sup>  |  |   |   |  |  |   | Not allowed                                       | 10 sf area   | 8 ft height                                   |             |  |  |
| 4. Order Board Sign <sup>1,2,10</sup>  |  |   |   |  |  |   | Not allowed                                       | 48 sf area   | 8 ft height <sup>10</sup>                     |             |  |  |

**Footnotes Containing Additional Development Requirements:**

- 1 Refer to Section 15.09.05 for definitions and rules for each Sign Category (lettered), and each Sign Type (numbered).
- 2 Available to land uses identified in Section 15.03.05. No signs are permitted in the Conservancy Zoning District.
- 3 The number of permitted on-building signs may be transferred from one wall to another, but the total combined sign area of all signs on the receiving wall shall still be limited by its length ratio of said wall.
- 4 Electronic Message Signs (of up to 50% of the sign area) are permitted for this Sign Type in nonresidential districts and requires Plan Commission approval prior to the issuance of a sign permit. See Section 15.09.08.
- 5 "Standard" means the following forms of sign lighting: ambient, backlit, internal, and gooseneck.
- 6 Group Development Signs may be up to 50% larger in area and 2 feet taller in height. See Section 15.09.10.
- 7 Every business shall be guaranteed a minimum of 40 square feet of Wall Sign area, regardless of the business's actual building façade length.
- 8 Bottom of sign shall be a min. of 14 feet above a drive, alley, street, parking space or other vehicle surface; a min. of 8 feet above a sidewalk, patio, or other ground-level surface; and a maximum 3 feet from the building. Wall Signs shall not project more than 12 inches horizontally beyond the edge of any wall or other surface to which they are mounted.
- 9 Sign must be located on-site and must not be located within any street right-of-way (which includes the entire public sidewalk and street terrace area) without a permit from the City Engineer. Off-premise Freestanding Signs are prohibited.
- 10 Order Board Signs shall conform to the location requirements for Drive-Through and In-Vehicle Sales or Service land uses. See Section 15.03.10(10). A maximum total of 96 sf of total Order Board Signs is permitted per business.
- 11 Sign must be designed of materials complementary to and harmonious with the building and site, and must be closely integrated with site landscaping.
- 12 Signs shall only be located on a public sidewalk or private walkway that is a minimum 6 feet wide and shall only be displayed during the hours of operation for the on-site land use.
- 13 Any internal illuminated sign must have opaque cabinet fields and a translucent message.
- 14 New Pylon Signs are only permitted in the Suburban Mixed-Use District. Existing Pylon Signs are permitted as legal nonconforming signs per the requirements of Section 15.09.35.
- 15 Any Sign permitted within the DHMU zoning district shall require review and approval by the Plan Commission.

Abbreviations: ft = feet max = maximum min = minimum sf = square feet C.U.P. = Conditional Use Permit P.C. = Plan Commission

**Example Sign Diagrams:**



**Section 5.** Amends Section 15.09.11, Figure 15.09.11(3) of the Zoning Ordinance to read as follows:

“Figure 15.09.11(3): Permanent Miscellaneous Sign Group

B. Optional Miscellaneous Sign Category

Sign Permit Required and Approver column

Yes: For each new sign. ~~P.C.~~City Staff approval.

Number of Signs Allowed column

1 per site ~~with a C.U.P.~~

Sing Area & Height Maximums for Zoning Districts column

DHMU15

Footnotes Containing Additional Development Requirements:

5 An Electronic Message Sign (of up to 50% of the sign area) is permitted for Institutional Information Signs and requires Plan Commission approval prior to the issuance of a sign permit. See Section 15.09.08. that are not located in or have a screen visible within 100 feet of a residential Zoning District.

11 Any Optional Miscellaneous Sign permitted within the DHMU zoning district shall require review and approval by the Plan Commission.”

Figure 15.09.11(3): Permanent Miscellaneous Sign Group 2

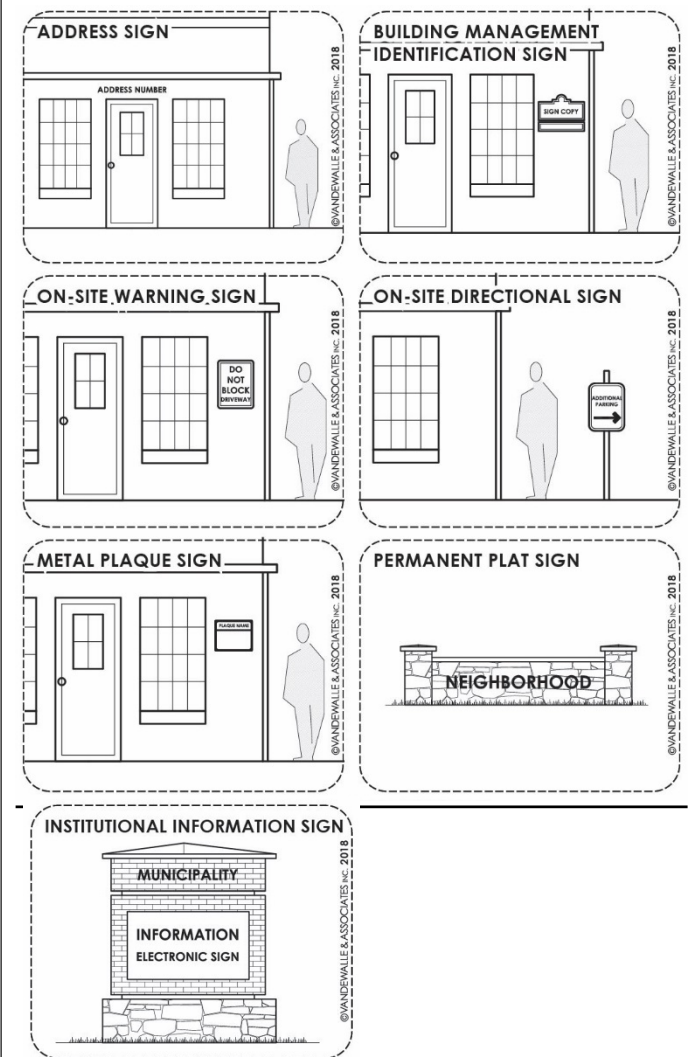
| Sign Categories & Sign Types                                      | Sign Permit Required and Approver                        | Number of Signs Allowed                               | Sign Locations Allowed   | Sign Face Materials Allowed           | Sign Lighting Allowed     | Sign Area Formula                        | Sign Area & Height Maximums for Zoning Districts: |                                    |  |                    |
|---|--|---|--|---------------------------------------|---------------------------|--|---|------------------------------------|--|--------------------|
|   |  |   |  |                                       |                           |  | 1 & 2 Family Residential                          | Multi-Family Residential           | Non-Residential and Mixed-Use                            | Downtown           |
|   |  |   |  |                                       |                           |  | RH-35, SR-2, SR-3, SR-5, SR-7, MH-7, DR-8, TF-10  | MRL-8, MRM-12, MRH-30              | I, NMU, UMU, SMU, DPMU, BP, LI, MI, HI, IOS, IOC, AO, EX | DHMU <sup>11</sup> |
| <b>A. City-Required Sign Category</b> <sup>1, 2, 6</sup>          |  |   |  |                                       |                           |  |   |                                    |  |                    |
| 1. Address Sign <sup>1, 2, 6</sup>                                | No. Sign Permit not required.                            | 1 per address. <sup>6, 9</sup>                        | On-building, and visible from street.  | Any durable, all-weather material.    | Ambient only.             | None needed. Use max sign area limit. →  | 4 sf max area<br>6 ft max mounted height          |                                    |  |                    |
| 2. Building Management Identification Sign <sup>1, 2, 6</sup>     | Yes. For each new sign. Staff approval                   |   | On-building, and next to main entry. <sup>8</sup>  |                                       |                           |  | 4 sf max area<br>6 ft max mounted height          |                                    |  |                    |
| 3. On-Site Warning Sign <sup>1, 2, 6</sup>                        |  | On-building, or freestanding. <sup>6</sup>            | 6 sf max area<br>4 ft max post mounted height<br>6 ft max building or fence height               |                                       |                           |  |   |                                    |  |                    |
| 4. On-Site Directional Sign <sup>1, 2, 6, 10</sup>                |  |   | 6 sf max area <sup>10</sup><br>4 ft max post mounted height<br>6 ft max building or fence height |                                       |                           |  |   |                                    |  |                    |
| <b>B. Optional Miscellaneous Sign Category</b> <sup>1, 2, 6</sup> |  |   |  |                                       |                           |  |   |                                    |  |                    |
| 1. Metal Plaque Sign <sup>1, 2</sup>                              | Yes. For each new sign. <b>P.C.-City Staff</b> approval. | Up to 3 per historic building, property, or district. | On-building <sup>8</sup> or freestanding. <sup>6</sup>   | Bronze, aluminum, or stainless steel. | Standard. <sup>7</sup>    | None. Needed. Use max sign area limit. → | 6 sf max area<br>6 ft max height                  |                                    |  |                    |
| 2. Permanent Plat Sign <sup>1, 2, 3, 6</sup>                      |  | As approved per the final plat.                       | Sign setback shall be at least max. sign height. <sup>6, 9</sup>                                 | Any durable, all-weather material.    | Standard. <sup>5, 7</sup> |  | 10 sf per 100 ft of lot frontage                  | 100 sf max area<br>6 ft max height | 128 sf max area<br>6 ft max height                       |                    |
| 3. Institutional Information Sign <sup>1, 2, 4, 5, 6</sup>        |  | 1 per site <b>with a C.U.P.</b>                       | Freestanding with minimum 15 ft setback. <sup>6, 9</sup>   |                                       |                           | Not allowed.                             | 128 sf max area<br>6 ft max height                | Not allowed.                       |  |                    |

**Footnotes Containing Additional Development Requirements:**

- 1 Refer to Section 15.09.05 for definitions and rules for each Sign Category (lettered), and each Sign Type (numbered).
- 2 Available to all land uses in Section 15.03.05., other than Institutional Information Signs. No signs are permitted in the Conservancy Zoning District.
- 3 Permanent Plat Signs shall be located within a platted outlot or within a permanent sign easement. See Section 15.09.05(3)(b)2.
- 4 Institutional Information Signs are only allowed for Institutional land uses as determined by the Zoning Administrator.
- 5 An Electronic Message Sign (of up to 50% of the sign area) is permitted for Institutional Information Signs **and requires Plan Commission approval prior to the issuance of a sign permit that are not located in or have a screen visible within 100 feet of a residential Zoning District. See Section 15.09.08**
- 6 Sign must be located on-site and must not be located within any street right-of-way (which includes the entire public sidewalk and street terrace area) or vision triangle.
- 7 "Standard" means the following forms of sign lighting: ambient, backlit, internal, and gooseneck.
- 8 On-building signs must be located within 10 feet of building's main entrance.
- 9 Additional Address and Building Management Identification Signs are allowed on each public right-of-way facing side of a property (corner lots).
- 10 May also include either the name, logo, or symbol of the destination, provided that the name, logo, or symbol is less than 1 square foot.
- 11 **Any Optional Miscellaneous Sign permitted within the DHMU zoning district shall require review and approval by the Plan Commission.**

Abbreviations: ft = feet max = maximum min = minimum sf = square feet C.U.P. = Conditional Use Permit P.C. = Plan Commission

**Example Sign Diagrams:**



**Section 6.** Amends Section 15.09.27 of the Zoning Ordinance to read as follows:

“(1) Applicability.

- ~~(a) — No Freestanding Sign listed under Section 15.09.05(1)(a), On-Building Sign listed under Section 15.09.05(1)(b), Pedestrian Sign listed under Section 15.09.05(1)(c), Bulletin Board or Order Board Sign under Section 15.09.05(1)(d), or Optional Miscellaneous Sign under Section 15.09.05(3)(b) shall be erected, installed, or constructed without approval from the City of Fort Atkinson Plan Commission.~~
- ~~(b) — No Menu Board or Sandwich Board Signs listed under Section 15.09.05(1)(d) or Building Management Identification Sign, On-Site Warning Sign, or On-Site Directional Sign listed under Section 15.09.05(3)(a), shall be erected, installed, constructed, or maintained without the granting of a permit from the Zoning Administrator in accordance with the provisions of this Section.~~
- ~~(a) — No Sign that requires city staff approval in Section 15.09.11 shall be erected, installed, or constructed without the granting of a permit from the Zoning Administrator in accordance with the provisions of this Section.~~
- ~~(b) — No Sign permitted in the DHMU zoning district in Section 15.09.11 shall be erected, installed, or constructed without approval from the City of Fort Atkinson Plan Commission.~~
- ~~(c) — No Electronic Message Sign (Section 15.09.08) shall be erected, installed, or constructed without approval from the City of Fort Atkinson Plan Commission.~~
- ~~(e)(d)~~ For signs requiring a permit in Subsection (a)-(c), above, this Section shall apply and be construed to require a permit for a change of copy on any sign or for any conversions or changes in the sign structure.
- ~~(d)(e)~~ This Section shall not apply to repainting or re-facing with the same sign copy, cleaning, repair, or other normal maintenance of the sign or sign structure.
- ~~(e)(f)~~ No new permit is required for signs which are in place as of the effective date this Chapter, and such signs may remain as legal nonconforming signs. Any alteration or relocation of such signs shall conform to the requirements of this Chapter. Refer to Section 15.09.35 for rules pertaining to nonconforming signs.
- ~~(f)(g)~~ Any sign permit granted hereunder shall not be assigned or transferred to any other sign, including a modified sign face or modified sign structure.
- ~~(g)(h)~~ The owner or tenant may request all such signs at one site be included under one permit.

(2) Review Authority

- ~~(a) — The Plan Commission shall review all Freestanding, On-Building, Pedestrian, Bulletin Board, Order Board, or Optional Miscellaneous Signs, all signs accompanying changes in use or new use which must receive approval of a zoning permit, and all proposed signs which would require approval of a~~

~~Group Development for a site or sites which will have more than one sign viewed together as part of a group of signs. This may be required with a zoning permit for change of use or a sign permit.~~ All signs which require approval of a sign permit by the Zoning Administrator or Plan Commission shall be reviewed according to the following evaluation factors:

1. Conformance to the zoning and sign code
2. Minimization of conflict with vehicular or pedestrian circulation
3. Compatibility with the building characteristics, adjacent uses, and adjacent signs.
4. Compatibility with the specific physical site conditions which warrant approval of the proposed sign.
5. Materials and maintenance aspects.
6. Legibility and visual clarity.

~~(b) At the discretion of the Zoning Administrator, any sign permit may be required to obtain Plan Commission approval if it cannot reasonably be determined if the evaluation factors above in (2)(a) or the standards in the basis for granting a sign permit in (5) below are met by the sign application.~~

~~(b)(c) The Plan Commission may grant special exception to this Article upon demonstration of due cause. Every applicant for a special exception to the sign district requirements shall submit a written statement to the Plan Commission which explains the reason for the request and how it meets the evaluation factors.”~~

**Section 7.** Effective Date. This ordinance shall take effect on after passage, publication, and attestation as required by law.

Enacted by the City Council of the City of Fort Atkinson, Jefferson County, Wisconsin, this \_\_\_\_\_ day of \_\_\_\_\_, 2026.

**Fort Atkinson City Council**

\_\_\_\_\_  
**Kyle Jaeckel, President**

ATTEST:

\_\_\_\_\_  
Michelle Ebbert, City Clerk/Treasurer/Finance Director



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Jedidiah Draeger, Director of Neighborhood and Building Services

**RE:** Review and possible action on a Planned Unit Development-General Development Plan for the property located at 23 N. Water St. E. and the westerly adjacent vacant lot (parcels 226-0514-0322-008 and 226-0514-0322-009), to allow removal of a vacant building and development of a 15-stall parking lot at the site (PUD-2025-03) (Draeger, Director of Neighborhood and Building Services)

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### BACKGROUND

The applicant proposes to establish a Planned Unit Development (PUD) — General Development Plan for 23 N. Water St. and the adjacent lot to the west. This phase of the PUD process is intended to identify and establish the specific flexibilities from the Zoning Ordinance being requested by the applicant.

### DISCUSSION

The Plan Commission held a public hearing on the Planned Unit Development—General Development Plan for this project at a meeting on March 10, 2026. There were no public comments at the public hearing and the Plan Commission recommended approval of the PUD-GDP.

### FINANCIAL ANALYSIS

There will be a minor reduction in the tax base associated with the deconstruction of the existing building. However, the structure is currently dilapidated and carries a relatively low assessed value. In addition, the project provides an opportunity to facilitate the reconstruction of an aging sewer main that has reached the end of its service life and is currently located beneath private property without adequate access for maintenance or repair. This improvement will enhance long-term infrastructure reliability and address a maintenance constraint for the City.

### RECOMMENDATION

City staff recommends approval of the General Development Plan, with the following

conditions:

1. All other applicable standards and requirements of the underlying DHMU zoning district shall continue to be in effect within this established PUD overlay, outside of those flexibilities noted below in item 2.
2. Nine proposed flexibilities from the DHMU zoning district standards:
  - a. Proposed flexibility to allow a permitted by-right principal land use of Off-Site Parking Lots in the DHMU zoning district is granted as proposed in the GDP submittal.
  - b. Proposed flexibility to allow a minimum pavement setback along the street, side, and rear property lines of 0 feet in the DHMU zoning district is granted as proposed in the GDP submittal.
  - c. Proposed flexibility to allow the maximum number of access points to be exceeded up to two on a parcel less than 200 feet in width is granted as proposed in the GDP submittal.
  - d. Proposed flexibility to allow the minimum number of bicycle and pedestrian connections to be less than one is granted as proposed in the GDP submittal.
  - e. Proposed flexibility to allow the minimum vision triangle standards to be less than 10 feet of visual clearance between the driveways and the public right-of-way is granted as proposed in the GDP submittal.
  - f. Proposed flexibility to allow the minimum green space areas for parking lots to be 0 feet along all property lines and between adjacent, neighboring property surface parking lots is granted as proposed in the GDP submittal.
  - g. Proposed flexibility to allow the minimum permitted throat length to be 4 feet is granted as proposed in the GDP submittal.
  - h. Proposed flexibility to allow the minimum aisle width for two-way traffic flow to be 6 feet on along the western property line is granted as proposed in the GDP submittal.
  - i. Proposed flexibility to allow the maximum footcandles at the property line to be exceeded up a maximum as defined within the SIP approval step.
3. Review and approval of a CSM providing cross-access easements with neighboring properties to the west and north and provide a utility easement to the City for replacement of an existing sanitary line, prior to approval of the Specific Implementation Plan.
4. The applicant is required to improve private storm sewer upgrades needed on the parcel and in the surrounding areas in coordination with City staff and adjoining property owners.
5. Any other recommendations of the City Council.

## **ATTACHMENTS**

1. PBP-DRAWINGS Rev 2 11x17 2-5-26
2. Plan Commission Memo 23 N. Water St.



# PREMIERBANK PARKING LOT REMODEL

23 N. Water Street East  
Fort Atkinson, WI 53538

VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START.

**DRAWING INDEX:**

- SP-1 SITE LOCATION & IMAGES, RENDERING
- SP-2 EXISTING SITE PLAN
- SP-3 PROPOSED SITE PLAN
- SP-4 LANDSCAPING PLAN
- SP-5 PROPOSED STORM SEWER LOCATION

**PROJECT DESCRIPTION:**

RAZE EXISTING STRUCTURE. EXPAND EXISTING PARKING, SERVING PREMIERBANK. (15) TOTAL PARKING SPACES.

INCREASE GREENSPACE BY 674 S.F. (8.4% INCREASE)

ADDITION OF (5) MASONRY PIERS WITH WROUGHT IRON FENCE TO MATCH EXISTING MASONRY PIERS LOCATED NORTH OF THE SITE AT SHERMAN AVE E -- SEE FORT ATKINSON PUBLIC PARKING LOT AT 210 N MAIN ST.

**EXISTING SITE INFORMATION:**

|                          |           |             |
|--------------------------|-----------|-------------|
| SITE AREA:               | 5062 S.F. | (0.12 ACRE) |
| BUILDING FOOTPRINT AREA: | 2412 S.F. | (47.6%)     |
| PARKING AREA:            | 2436 S.F. | (48.1%)     |
| GREEN SPACE AREA:        | 204 S.F.  | (4.02%)     |

**PROPOSED SITE INFORMATION:**

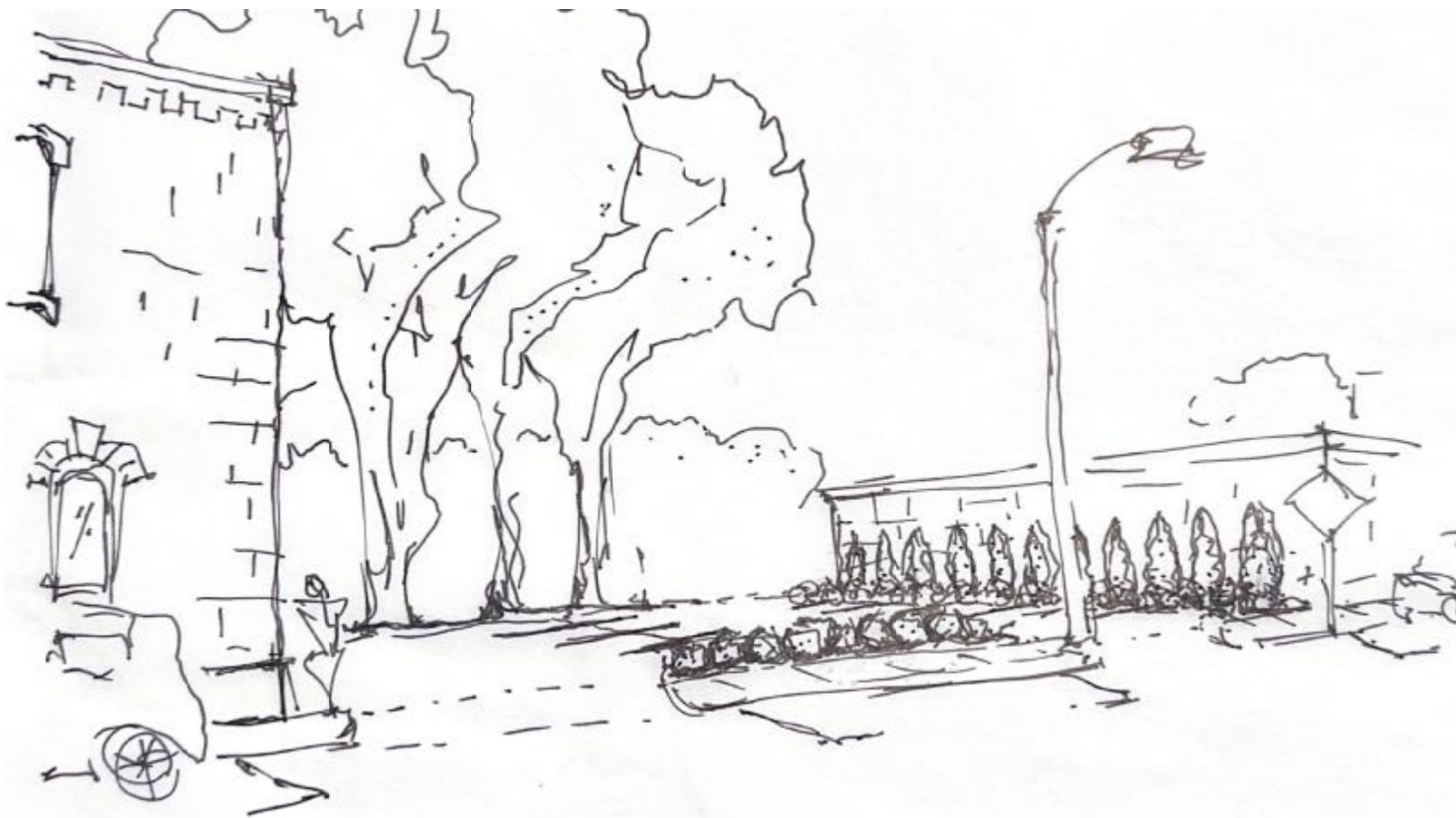
|                          |           |             |
|--------------------------|-----------|-------------|
| SITE AREA:               | 5062 S.F. | (0.12 ACRE) |
| BUILDING FOOTPRINT AREA: | 0 S.F.    | (00.0%)     |
| PARKING AREA:            | 4299 S.F. | (84.9%)     |
| GREEN SPACE AREA:        | 763 S.F.  | (15.1%)     |

ALL DRAWINGS ARE  
1/2 SCALE SHOWN

PRELIMINARY NOT  
FOR CONSTRUCTION



**EXISTING SITE IMAGES**  
SCALE: N.T.S.  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022



**SOUTH PERSPECTIVE RENDERING**  
SCALE: N.T.S.  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022



SITE LOCATION

**SITE LOCATION MAP**  
SCALE: N.T.S.  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022

**Design Alliance Architects, Inc.**  
1003 Madison Avenue  
Fort Atkinson, WI  
(920) 563-3404

PREMIER BANK PARKING LOT  
23 N. Water Street East  
Fort Atkinson, WI 53538

**DRAWING NAMES**

SITE INFO

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**REVISIONS**

|   |           |
|---|-----------|
| 1 | 6/28/2024 |
| 2 | 2/3/2025  |
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**PROJECT DATA**

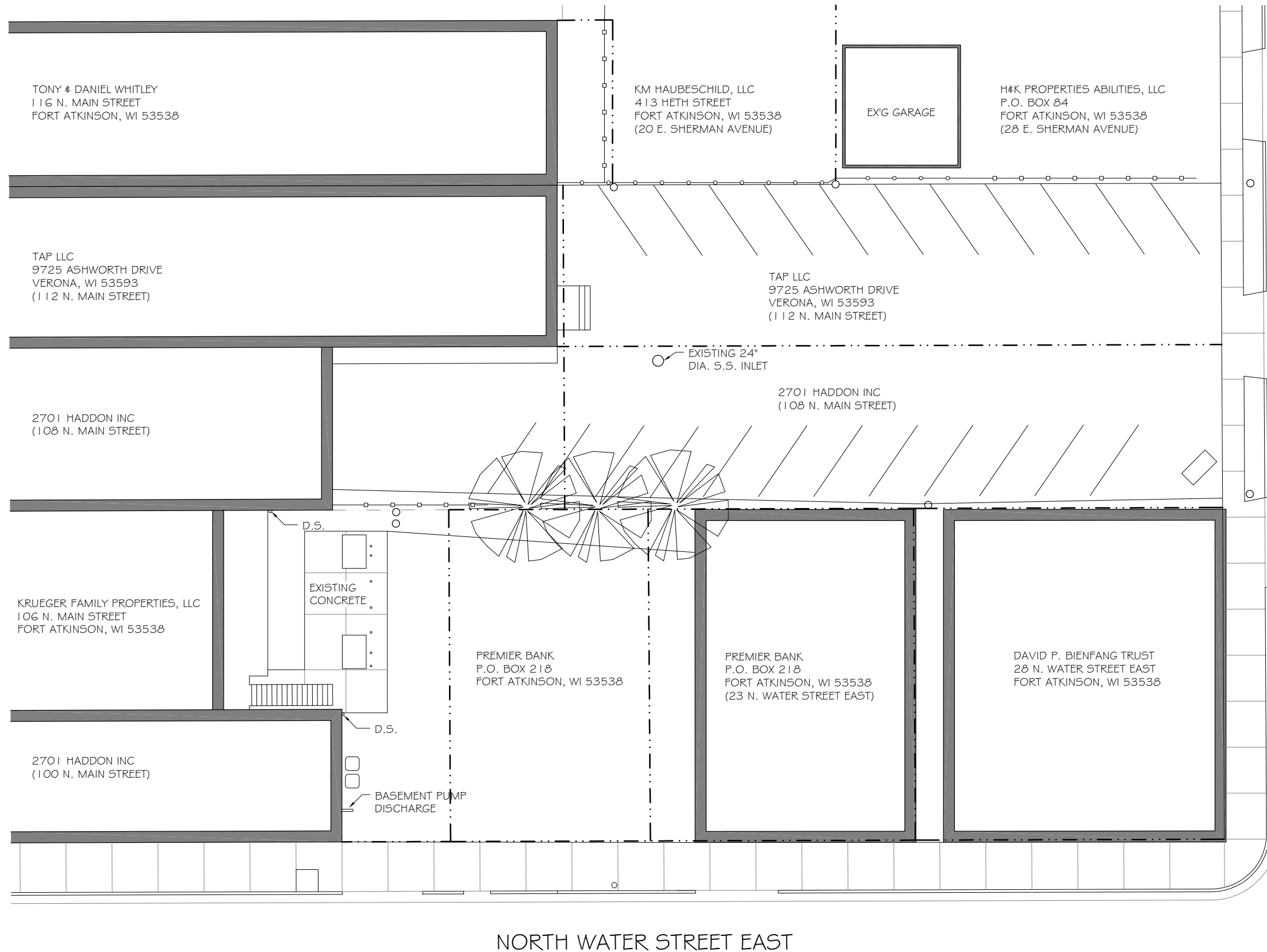
DATE: 9/13/2023  
DRAWN BY: CL, CJ  
CHECKED BY: P.W.

SHEET NO.

SP-1

VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START.

ALL DRAWINGS ARE  
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FOR CONSTRUCTION



EDWARD STREET

NORTH WATER STREET EAST



EXISTING SITE PLAN

SCALE: 1" = 10'-0"  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022

**Design Alliance Architects, Inc.**  
1003 Madison Avenue  
Fort Atkinson, WI  
(920) 563-3404

**PREMIER BANK PARKING LOT**  
23 N. Water Street East  
Fort Atkinson, WI 53538

DRAWING NAMES

|                    |  |
|--------------------|--|
| EXISTING SITE PLAN |  |
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REVISIONS

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|---|-----------|
| 1 | 6/28/2024 |
| 2 | 2/3/2025  |
|   |           |
|   |           |

PROJECT DATA

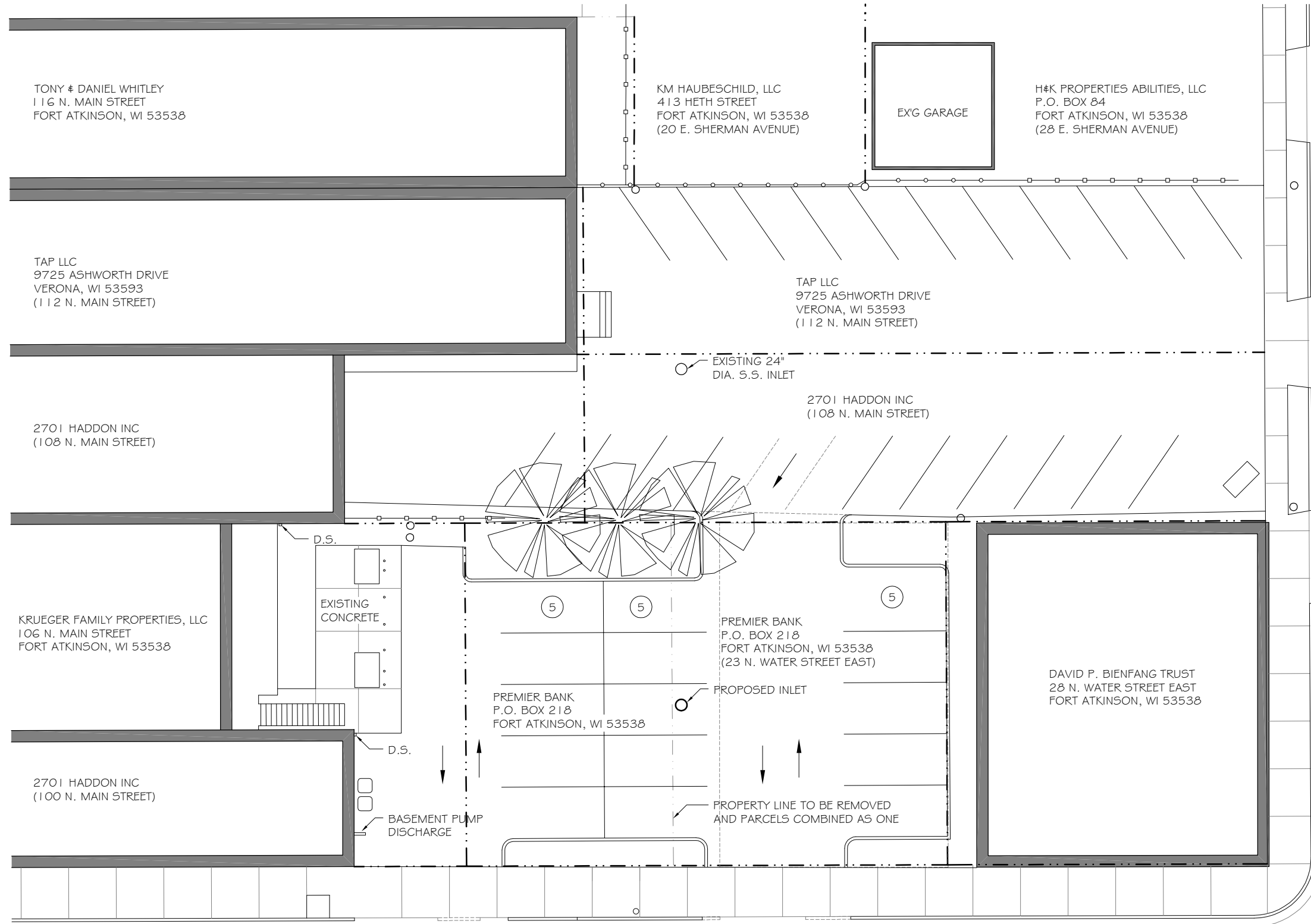
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|-------------|-----------|
| DATE:       | 9/13/2023 |
| DRAWN BY:   | CL, CJ    |
| CHECKED BY: | P.W.      |

SHEET NO.

**SP-2**

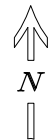
VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START.

ALL DRAWINGS ARE  
1/2 SCALE SHOWN  
  
PRELIMINARY NOT  
FOR CONSTRUCTION



EDWARD STREET

NORTH WATER STREET EAST



PROPOSED SITE PLAN

SCALE: 1" = 10'-0"  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022

**Design Alliance Architects, Inc.**  
1003 Madison Avenue  
Fort Atkinson, WI  
(920) 563-3404

**PREMIER BANK PARKING LOT**  
23 N. Water Street East  
Fort Atkinson, WI 53538

DRAWING NAMES

PROPOSED SITE PLAN

REVISIONS

|   |           |
|---|-----------|
| 1 | 6/28/2024 |
| 2 | 2/3/2025  |

PROJECT DATA

DATE: 9/13/2023  
DRAWN BY: CL, CJ  
CHECKED BY: P.W.

SHEET NO.

**SP-3**

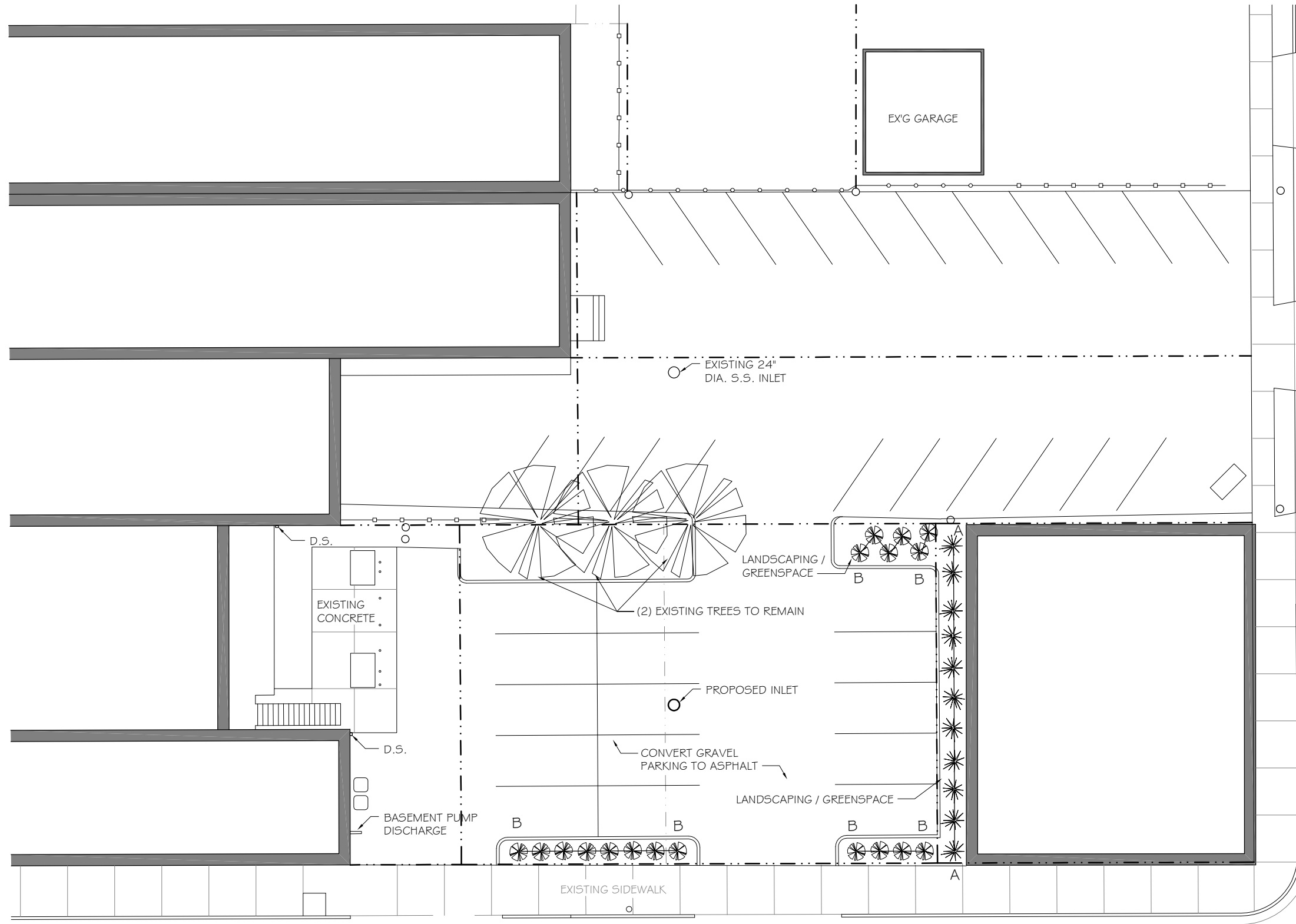
VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START.

ALL DRAWINGS ARE  
1/2 SCALE SHOWN  
  
PRELIMINARY NOT  
FOR CONSTRUCTION

PLANTING SCHEDULE

| TYPE | DESCRIPTION             | PLANTING SIZE | MATURE SIZE | QUANTITY |
|------|-------------------------|---------------|-------------|----------|
| A    | ARBOR VITAE 'PYRAMIDAL' | 3-4'H         | 6' DIA      | 11       |
| B    | DWARF SPIREA 'PROEBELI' | 15-18'H       | 3' DIA      | 18       |

NOTE: MATURE SIZES GIVEN ARE FOR PLANT SIZE AFTER 7-12 YEARS GROWTH TYP.



EDWARD STREET

NORTH WATER STREET EAST



**Design Alliance Architects, Inc.**  
1003 Madison Avenue  
Fort Atkinson, WI  
(920) 563-3404

PREMIER BANK PARKING LOT  
23 N. Water Street East  
Fort Atkinson, WI 53538

DRAWING NAMES

PROPOSED SITE PLAN

REVISIONS

|   |           |
|---|-----------|
| 1 | 6/28/2024 |
| 2 | 2/3/2025  |

PROJECT DATA

DATE: 9/13/2023  
DRAWN BY: CL, CJ  
CHECKED BY: P.W.

SHEET NO.

SP-4

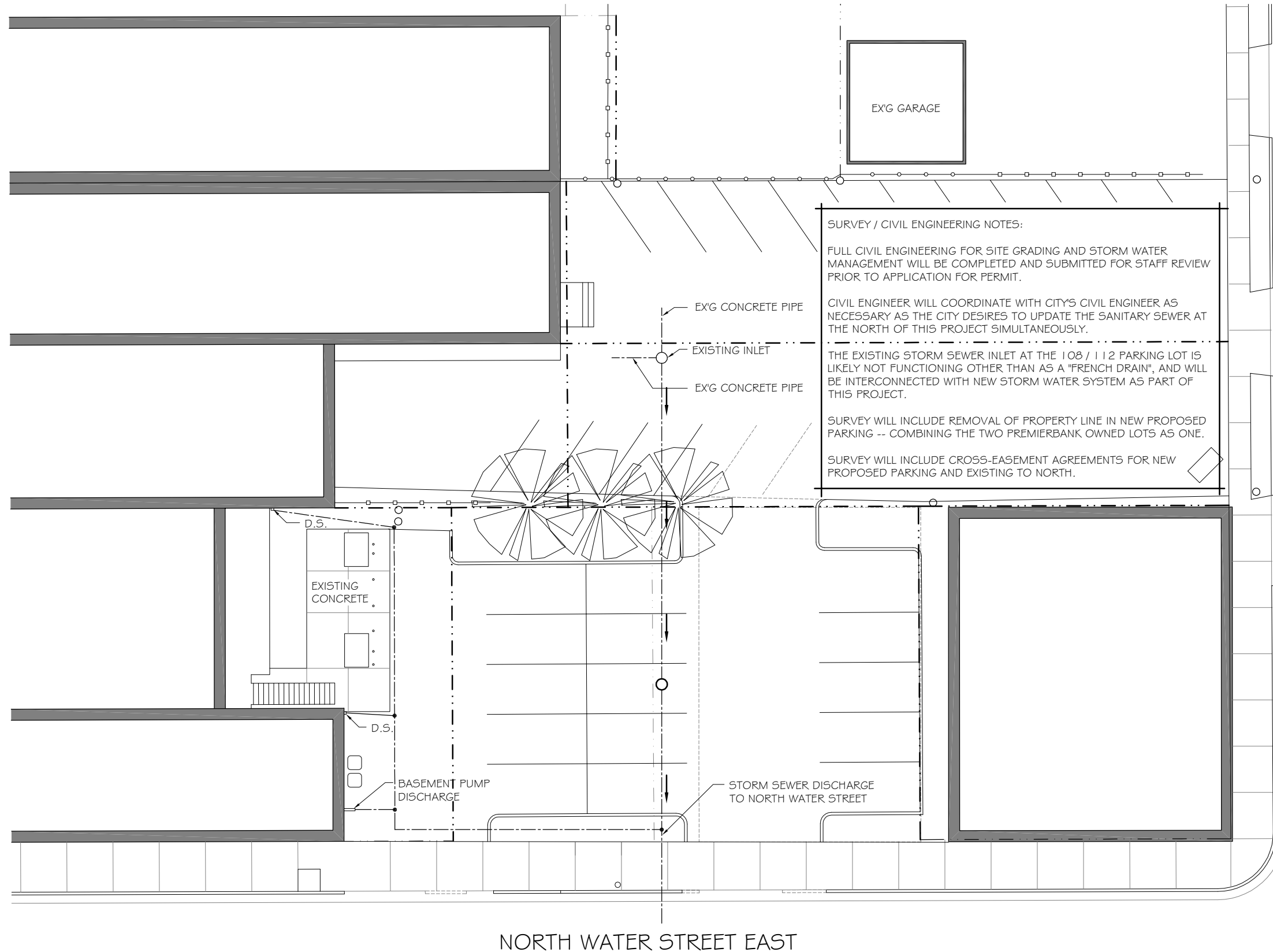


LANDSCAPE PLAN

SCALE: 1" = 10'-0"  
2022/PREMIER BANK PARKING/FBP-DRAWINGS.DWG  
DATE: AUGUST 12, 2022

VERIFY ALL CONDITIONS AND DIMENSIONS ON THE JOB AND NOTIFY THE DESIGN ALLIANCE ARCHITECTS, INC. OF ANY DISCREPANCIES PRIOR TO START.

ALL DRAWINGS ARE  
1/2 SCALE SHOWN  
  
PRELIMINARY NOT  
FOR CONSTRUCTION



**SURVEY / CIVIL ENGINEERING NOTES:**

FULL CIVIL ENGINEERING FOR SITE GRADING AND STORM WATER MANAGEMENT WILL BE COMPLETED AND SUBMITTED FOR STAFF REVIEW PRIOR TO APPLICATION FOR PERMIT.

CIVIL ENGINEER WILL COORDINATE WITH CITY'S CIVIL ENGINEER AS NECESSARY AS THE CITY DESIRES TO UPDATE THE SANITARY SEWER AT THE NORTH OF THIS PROJECT SIMULTANEOUSLY.

THE EXISTING STORM SEWER INLET AT THE 108 / 112 PARKING LOT IS LIKELY NOT FUNCTIONING OTHER THAN AS A "FRENCH DRAIN", AND WILL BE INTERCONNECTED WITH NEW STORM WATER SYSTEM AS PART OF THIS PROJECT.

SURVEY WILL INCLUDE REMOVAL OF PROPERTY LINE IN NEW PROPOSED PARKING -- COMBINING THE TWO PREMIERBANK OWNED LOTS AS ONE.

SURVEY WILL INCLUDE CROSS-EASEMENT AGREEMENTS FOR NEW PROPOSED PARKING AND EXISTING TO NORTH.

**PREMIER BANK PARKING LOT**  
23 N. Water Street East  
Fort Atkinson, WI 53538

| DRAWING NAMES      |  |
|--------------------|--|
| PROPOSED SITE PLAN |  |

| REVISIONS |           |
|-----------|-----------|
| 1         | 6/28/2024 |
| 2         | 2/3/2025  |

| PROJECT DATA |           |
|--------------|-----------|
| DATE:        | 9/13/2023 |
| DRAWN BY:    | CL, CJ    |
| CHECKED BY:  | P.W.      |

| SHEET NO. |  |
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| SP-5      |  |



## General Development Plan REPORT TO THE PLAN COMMISSION

**DATE:** March 10, 2026

**PROPERTY ADDRESS:** 23 N. Water Street and the westerly adjacent vacant lot

**PARCEL NUMBER:** 226-0514-0322-008 and 226-0514-0322-009

**OWNER:** Premier Bank

**APPLICANT:** Premier Bank

**FILE NUMBER:** PUD-2025-03

**EXISTING ZONING:** DHMU, Downtown Historic Mixed Use

**PROPOSED ZONING:** DHMU, with Planned Unit Development Overlay

**EXISTING LAND USE:** Parking lot and vacant building

**REQUESTED USES:** Off-site parking lot

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### BACKGROUND

#### Planned Unit Development - GDP REVIEW: Section 15.10.44

Section 15.02.81 of the City of Fort Atkinson Zoning Ordinance outlines the purpose, intent, potential zoning flexibilities, and applicability associated with a PUD. Additionally, Section 15.10.44 of the Zoning Ordinance outlines the procedural steps associated with a PUD. This requires a two-step process: 1) General Development Plan (GDP) to establish the new customized zoning requirements for the property and 2) Specific Implementation Plan (SIP) to review the details of the project associated with the Site Plan. Both must be acted upon by the Plan Commission and/or City Council for approval in reflection of defined criteria as listed within the ordinance.

A Planned Unit Development (PUD) allows a municipality to provide flexibility from certain zoning and design standards in order to accommodate unique site conditions or development proposals that may not fit within the City's zoning regulations. In exchange for this flexibility, the PUD process allows the City to review the project comprehensively to ensure the overall development remains consistent with community planning goals and provides an appropriate site design.

---

### REQUEST OVERVIEW

Premier Bank owns two parcels of land located between Main Street and Edward Street, with frontage along N. Water Street East. One of these parcels is a gravel parking lot, while the other contains a vacant building that was previously used as an auto alignment shop.



The applicant is proposing to demolish the existing building on the eastern parcel and combine the two parcels into a single lot to develop a 15-stall off-site parking lot. This new parking lot would provide additional spaces for bank staff and customers, helping meet parking needs as part of the bank's ongoing development. Currently, Premier Bank has an agreement with the adjacent Bienfang's Bar property for staff parking. However, this arrangement may not continue in the future, as the parking area is privately owned and access is not guaranteed long-term. In response, the proposed parking lot will serve as a replacement for the current parking spaces, ensuring long-term, dedicated parking for the bank. To assess the need for parking, the applicant conducted a parking study for the immediate area, which concluded that the proposed lot would help reduce peak parking occupancy in surrounding public parking areas in the downtown area.

Today, the applicant is seeking Plan Commission review of the General Development Plan (GDP), which is the first step (zoning) in the Planned Unit Development (PUD) approval process. The second step (Specific Implementation Plan), which will include a CSM to combine the lots, will come before the Plan Commission for consideration at a later date, pending the outcome of today's agenda items.

**PUBLIC NOTICE:**

A public hearing is required for Zoning Map Amendment review and action. All required public hearing notices have been properly posted in compliance with state law.

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**DISCUSSION**

**Certified Survey Map (CSM) REVIEW:**

The applicant is not seeking CSM review and action today, but it is important to consider the requirements while considering approval of the GDP. A future Certified Survey Map is planned to combine two existing parcels into one. The Land Division and Development Code requires that the CSM be reviewed by the Plan Commission for consistency with all other ordinances, laws, rules, regulations, and plans. The Zoning Ordinance has minimum and maximum density, intensity, and bulk regulations for all properties in the City. As further described below, the new

parcel proposed to be created via the CSM must meet the minimum standards for the DHMU zoning district.

Minimum lot dimensions must be met, as shown below:

| Bulk Regulation             | DHMU Standard | Proposed New Parcel |
|-----------------------------|---------------|---------------------|
| Minimum Lot Area            | 3,000 sf      | 5,051 sf            |
| Minimum Lot Width           | None          | 84 feet             |
| Minimum Lot Depth           | None          | 60 feet             |
| Minimum Lot Frontage at ROW | None          | 84 feet             |

**GENERAL DEVELOPMENT PLAN (GDP) REVIEW:**

The property will utilize the DHMU zoning district as the underlying requirements. The DHMU district does not currently permit principal Off-Site Parking Lots as a permitted land use. Through the proposed GDP rezoning, the underlying DHMU zoning district will remain in place and this GDP will indicate all requested flexibilities or deviations from that zoning district.

Per Section 15.03.18(6), the Off-Site Parking Lot land use requires the following:

- Access and vehicular circulation shall be designed so as to discourage cut-through traffic = Met (the proposed interconnected surface parking lots may facilitate some cut-through traffic, but volumes will most likely be very low given site constraints, a small number of parking spaces, and tighter traffic circulation areas between the two lots in this downtown setting)

The DHMU zoning district’s bulk dimensions must also be met as shown below:

| Requirement Type                  | Requirement                          | Proposed                            |
|-----------------------------------|--------------------------------------|-------------------------------------|
| Min. Lot Area                     | 3,000 sf                             | 5,051 sf                            |
| Max. Impervious Surface Area      | 100%                                 | 85%                                 |
| Max. Building Coverage            | 90%                                  | 0%                                  |
| Min. Lot Width                    | None                                 | 84 feet                             |
| Min. Lot Depth                    | None                                 | 60 feet                             |
| Min. Lot Frontage at ROW          | None                                 | 84 feet                             |
| Min. Front or Street Side Setback | 0 or 10 feet                         | N/A (no building)                   |
| Min. Side Yard Setback            | 0 feet                               | N/A (no building)                   |
| Min. Rear Yard Setback            | 10 feet                              | N/A (no building)                   |
| Max. Building Height              | 50 feet                              | N/A (no building)                   |
| Min. Pavement Setback             | Rear/Side: 5 feet<br>Street: 10 feet | Rear: 7 feet<br>Side: <b>0 feet</b> |

**GDP FLEXIBILITIES REQUESTED:**

The proposed GDP identifies the following items of flexibility from the standards of the DHMU zoning district:

1. The **Permitted Principal Uses** established in Section 15.02.34 of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, an Off-Site Parking Lot is not a permitted principal land use in the DHMU zoning district. The proposed development includes an Off-Site Parking Lot as a principal land use on the site.
2. The **Minimum Pavement Setback** established in Section 15.02.34(7) of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, a minimum of 10 feet is required for pavement adjacent to the street and 5 feet is required for pavement adjacent to side or rear property lines. The proposed development includes a minimum pavement setback of 0 feet on the side property lines and 4 feet on the street facing property line.
3. The **Maximum Number of Access Points** established in Section 15.06.03(5) of the Zoning Ordinance will not be met by this proposal.
  1. Specially, only one access point is permitted to any lot less than 200 feet in width. The proposed development includes two access points on a property that's only 84 feet wide.
4. The **Minimum Number of Bicycle and Pedestrian Connections** in Section 15.06.04 of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, a minimum of one 5-foot-wide pedestrian and bicycle access point is required from at least one street frontage. The proposed development does not include any pedestrian and bicycle access points.
5. The **Minimum Vision Triangle Standards** in Section 15.06.05 of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, a minimum 10-foot vision triangle clearance is required between driveways and the public right-of-way. The proposed development includes a vision triangle clearance of less than 10 feet.
6. The **Minimum Green Space Area for Parking Lots** established in Section 15.06.06(9) of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, a minimum 10-foot green area along all street frontages and interior lot lines shall be required from on-site parking lot areas and a minimum 10-foot green area between abutting off-street parking areas on neighboring properties shall be required. The proposed development includes a 7-foot green area along the northern property line, 4-foot green area along the southern property line, and 0-foot green area along the eastern and western property lines.
7. The **Minimum Permitted Throat Length** established in Section 15.06.06(j) of the Zoning Ordinance will not be met by this proposal

1. Specifically, for parking lots of 6 or more stalls, the minimum throat length required is 25 feet. The proposed development includes 15 parking stalls with a 4-foot throat length (15 feet from the curb).
8. The **Minimum Aisle Width for Two-Way Traffic Flow** established in Section 15.06.06(15) of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, the minimum aisle width for two-way traffic flow is required to be 24 feet. The proposed development includes a 6-foot aisle width along the western property line (total of 14 feet if adjacent private property is included in that measurement).
9. The **Maximum Footcandles at the Property Line** established in Section 15.06.20 of the Zoning Ordinance will not be met by this proposal.
  1. Specifically, the minimum foot candles permitted at the property line is 1.0. The proposed development (if it includes exterior lighting which is currently unknown given the plans provided) would not be able to meet this requirement given the site layout and connections to adjacent existing parking areas.

**ZONING MAP AMENDMENT (GDP) FINDINGS:**

A Zoning Map Amendment must be reviewed per the requirements of Section 15.10.31(4)(b) of the Zoning Ordinance. City Staff is required to provide a written report regarding this review to assist the Plan Commission and Common Council in reviewing the proposed amendment.

1. Does the proposed Zoning Map Amendment advance the purposes of the Zoning Ordinance as outlined in Section 15.01.03? Yes. The proposed zoning map amendment protects the health, safety, morals, comfort, convenience, and general welfare of the public. This will be accomplished through consistency with the neighboring land uses and assisting the long-term parking needs of downtown businesses.
2. Is the proposed Zoning Map Amendment in harmony with the Comprehensive Plan? Yes. The proposed zoning map amendment is consistent with the Downtown designation on the Future Land Use Map and several of the plan’s stated goals for economic development, utilities and community facilities, and land use.
3. Does the proposed Zoning Map Amendment maintain the desired consistency of land uses, land use intensities, and land use impacts within the pertinent Zoning District? Yes. The proposed zoning map amendment is consistent with adjacent land use patterns that includes off-street surface parking lots to support downtown businesses.
4. Does the proposed Zoning Map Amendment address any of factors that are not accomplished on the current Zoning Map?
  1. The designations of the Zoning Map are not in conformance with the Comprehensive Plan. N/A
  2. A mapping mistake was made. N/A
  3. Factors have changed such as new data, infrastructure, market conditions, development, annexation, or other zoning changes that make the subject property more appropriate for a different zoning district. Yes. The proposed

zoning map amendment allows for the creation of additional parking spaces in the downtown area to support local businesses and assist in meeting the unmet demand for parking as documented within the applicant's parking study.

4. Growth patterns or rates have changed, creating the need for an amendment to the Zoning Map. N/A

#### **OVERVIEW OF SPECIFIC IMPLEMENTATION PLAN (SIP)**

The applicant is not seeking SIP review and action today, but it is important to consider the proposed development plan details as part of this GDP review:

- The proposed off-site parking lot is situated directly across the street from Premier Bank's existing on-site parking lot. Pedestrians could use one of two nearby intersections to safely cross N. Water Street East or an additional pedestrian mid-block crossing could be added to assist in facilitating safe pedestrian movements.
- The western access point looks to align with Premier Bank's existing on-site parking lot access point to the south.
- The proposed off-site parking lot area is currently interconnected between several other adjacent properties. The applicant will need to secure cross-access easements between each of the neighboring properties to ensure connectivity and accessibility.
- The proposed development will improve the aesthetic look and overall functionality of the area by increasing the green space between the two existing sites by 763 square feet (15% increase from today), reconstructing the pavement, removing the dilapidated structure, and improving utility infrastructure in the area.
- The applicant has engaged in discussions with the City and neighboring properties regarding private storm sewer upgrades.
- The applicant has agreed to allow an easement for the replacement of an 8-inch clay sanitary sewer line, which has recently encountered issues. This line runs north to south behind and beneath the Main Street buildings on the east side of N. Main Street, extending beyond the private property boundaries.

#### **PUD APPROVAL CRITERIA:**

The Plan Commission must make a finding with respect to the following criteria:

- The proposed planned unit development project is consistent with the overall purpose and intent of this chapter = Met
- The proposed planned unit development project is consistent with the City's Comprehensive Plan and other area plans = Met
- The proposed planned unit development project would maintain the desired relationships between land uses, land use densities and intensities, and land use impacts in the environs of the subject site = Met

- Adequate public infrastructure is or will be available to accommodate the range of uses being proposed for the planned unit development project, including but not limited to public sewer and water and public roads = Met
- The proposed planned unit development project will incorporate appropriate and adequate buffers and transitions between areas of difference land uses and development densities/intensities = Met
- The proposed planned unit development project design does not detract from areas of natural beauty surrounding the site = Met
- The proposed architecture and character of the proposed planned unit development project is compatible with adjacent/nearby development = Met
- The proposed planned unit development project will positively contribute to and not detract from the physical appearance and functional arrangement of development in the area = Met
- The proposed planned unit development project will produce significant benefits in terms of environmental design and significant alternative approaches to addressing development performance that relate to and more than compensate for any requested exceptions/base standard modifications variation of any standard or regulation of this chapter = Met
- For planned unit development projects that are proposed to be developed in phases, the applicant can provide a timeline for development and can demonstrate that the project would be successful even if all phases were not or could not be completed = N/A

The proposed General Development Plan (GDP) identifies nine (9) areas of flexibility from the standards of the DHMU zoning district. Each of the requested flexibilities is directly related to the proposed use, an off-site parking lot, and the physical constraints and configuration typical of downtown development patterns in this area. If a similar project were proposed in another area of Fort Atkinson, there would likely be sufficient space to meet the ordinance's base standards without modification. However, within the core blocks of downtown Fort Atkinson, site limitations and existing development patterns significantly constrain design options.

During the Zoning Ordinance rewrite, Off-Site Parking Lots were intentionally not permitted as a standalone principal use within the DHMU district. This policy decision was made to prioritize the preservation and reuse of existing structures and to prevent large surface parking lots from occupying valuable land within the downtown core. In this instance, however, additional context has been provided through the applicant's parking analysis and a multi-year collaborative process with City staff. The proposal is intended to address documented parking deficiencies, improve a currently underutilized and deteriorating property, upgrade public and private utilities in and around the site, and design the parking area in a manner that is responsive to adjacent land uses and nearby property owners.

City Staff and Premier Bank have worked closely together over an extended period to develop a plan that balances ordinance intent with practical site constraints. Through this collaboration,

the parties have shaped a proposal that improves conditions for all stakeholders and advances the broader interests of the City. The result is a plan that not only addresses the applicant’s operational needs but also contributes to site cleanup, infrastructure improvements, and better overall coordination within the downtown area.

Additionally, the property’s location, positioned off Main Street, helps minimize impacts on the historic streetscape while still providing critical support to downtown activity. By accommodating off-site parking in this location, the project reduces future demand for shared and on-street parking resources, thereby supporting the long-term parking strategy for the downtown district and reinforcing the vitality of the surrounding commercial core.

For these reasons, City staff supports this proposal based on its potential to improve public infrastructure, remove safety hazards, and help coordinate the long-term redevelopment of the downtown area.

---

**RECOMMENDATION**

City staff recommends approval of the General Development Plan, with the following conditions:

1. A recommendation to the City Council that the General Development Plan for parcels 226-0514-0322-008 and 226-0514-0322-009 be approved, subject to any and all requirements identified by the Plan Commission.
2. All other applicable standards and requirements of the underlying DHMU zoning district shall continue to be in effect within this established PUD overlay, outside of those flexibilities noted below in item 3.
3. Nine proposed flexibilities from the DHMU zoning district standards:
  - a. Proposed flexibility to allow a permitted by-right principal land use of Off-Site Parking Lots in the DHMU zoning district is granted as proposed in the GDP submittal.
  - b. Proposed flexibility to allow a minimum pavement setback along the street, side, and rear property lines of 0 feet in the DHMU zoning district is granted as proposed in the GDP submittal.
  - c. Proposed flexibility to allow the maximum number of access points to be exceeded up to two on a parcel less than 200 feet in width is granted as proposed in the GDP submittal.
  - d. Proposed flexibility to allow the minimum number of bicycle and pedestrian connections to be less than one is granted as proposed in the GDP submittal.
  - e. Proposed flexibility to allow the minimum vision triangle standards to be less than 10 feet of visual clearance between the driveways and the public right-of-way is granted as proposed in the GDP submittal.
  - f. Proposed flexibility to allow the minimum green space areas for parking lots to be 0 feet along all property lines and between adjacent, neighboring property

- surface parking lots is granted as proposed in the GDP submittal.
- g. Proposed flexibility to allow the minimum permitted throat length to be 4 feet is granted as proposed in the GDP submittal.
  - h. Proposed flexibility to allow the minimum aisle width for two-way traffic flow to be 6 feet on along the western property line is granted as proposed in the GDP submittal.
  - i. Proposed flexibility to allow the maximum footcandles at the property line to be exceeded up a maximum as defined within the SIP approval step.
- 4. Review and approval of a CSM providing cross-access easements with neighboring properties to the West and North and provide a utility easement to the City for replacement of an existing sanitary line, prior to approval of the Specific Implementation Plan.
  - 5. The applicant is required to improve private storm sewer upgrades needed on the parcel and in the surrounding areas in coordination with City staff and adjoining property owners.
  - 6. Any other recommendations of City staff or the Plan Commission.

---

#### **ATTACHMENTS**

- 1. PBP-DRAWINGS Rev 2 11x17 2-5-26
- 2. Premier Bank Documents



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Jedidiah Draeger, Director of Neighborhood and Building Services

**RE:** Review and possible action relating to a Certified Survey Map for the property located at 1310 Campus Dr. (Draeger, Director of Neighborhood and Building Services)

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### BACKGROUND

Sections 70.05.04 and 70.06.03 of the City of Fort Atkinson Land Division and Development Ordinance outline the requirements for the Plan Commission and City Council when reviewing and approving Certified Survey Maps (CSMs) to ensure conformance with all ordinances and plans.

### DISCUSSION

Property owner Tip of the Spear LLC has requested approval of a two-lot Certified Survey Map (CSM) for the parcel located at 1310 Campus Drive. The purpose of the CSM is to divide the existing 5.39-acre property into two separate developable lots. Proposed Lot 1 will have frontage along Campus Drive and Hawthorne Drive and will contain approximately 3.587 acres. Proposed Lot 2 will have frontage along Banker Road and will contain approximately 1.7995 acres.

The Plan Commission reviewed the request and recommended that the City Council approve the Certified Survey Map at its March 10, 2026 meeting, subject to the conditions outlined in the staff recommendation.

The property is currently zoned Planned Mixed Use (PUD) with an underlying zoning designation of Multifamily Residential-30 (MRH-30). The PUD zoning designation would remain in place for both newly created parcels. If the CSM is approved, the previously approved development proposal and any future development proposals for the site would require review and approval through the PUD process.

Overall, the proposed CSM meets the requirements of the City's Land Division and Development Ordinance and the dimensional standards of the City's Zoning Ordinance.

## **FINANCIAL ANALYSIS**

The proposed Certified Survey Map (CSM) is not expected to have a direct financial impact on the City. However, its approval would create an additional developable parcel that could allow for additional residential units under the current underlying zoning designation of Multifamily Residential-30 (MRH-30), which may increase the property's future tax base if developed.

## **RECOMMENDATION**

Staff and the Plan Commission recommend the City Council approve this preliminary Certified Survey Map, subject to the following conditions:

- Adjust the final CSM to reflect City Council President Kyle Jaeckel under the City of Fort Atkinson Approval Certificate.
- Remove access easements from the Final CSM, noted as 7 and 8 in the Easement Notes of the submitted CSM.

## **ATTACHMENTS**

1. Plan Commission Memo CSM 1310 Campus Dr.
2. Tip of the Spear CSM\_2-26-2026
3. Application\_Redacted



## Preliminary CSM Review REPORT TO THE PLAN COMMISSION

**DATE:** March 10, 2026  
**PROPERTY ADDRESS:** 1310 Campus Dr.

**PARCEL NUMBER:** 226-0614-3323-015  
**OWNER:** Tip of the Spear LLC  
**APPLICANT:** Tip of the Spear LLC

**FILE NUMBER:** CSM-2026-03  
**EXISTING ZONING:** Planned Unit  
Development  
**PROPOSED ZONING:** No Change  
**EXISTING LAND USE:** Vacant  
**REQUESTED USES:** No change requested

---

### BACKGROUND

Sections 70.05.04 and 70.06.03 of the City of Fort Atkinson Land Division and Development Ordinance outline the requirements for the Plan Commission and City Council to review and approve the Certified Survey Map (CSM) to ensure conformance with all ordinances and plans.

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### REQUEST OVERVIEW

Property owner Tip of the Spear LLC has requested approval of a two-lot Certified Survey Map (CSM) for the parcel located at 1310 Campus Drive. The purpose of the CSM is to divide the existing 5.39-acre property into two separate developable lots. Proposed Lot 1 will have frontage along Campus Drive and Hawthorne Drive and will contain approximately 3.587 acres. Proposed Lot 2 will have frontage along Banker Road and will contain approximately 1.7995 acres.

### CSM Review:

There are two access easements shown between Lots 1 and 2 on the CSM. One easement provides a limited access point across Lot 1 to serve Lot 2, while a second, larger easement grants more substantial access rights across Lot 1 for the benefit of Lot 2. The original intent of these easements was to provide a potential access connection to the high school through Lot 1 for the benefit of Lot 2.

City staff reviewed the proposed easements and identified concerns that the larger easement across Lot 1 could discourage future development of that parcel. Specifically, a future purchaser of Lot 1 would be required to allow residents or users of Lot 2 to access a portion of their private property, which could reduce the parcel's marketability.

The applicant acknowledged similar concerns. While shared access between the two parcels

could provide mutual benefit, the applicant agreed that establishing permanent easements at this stage could create complications for future development. The applicant indicated it would be preferable for the eventual developers or property owners of each parcel to determine any necessary easement arrangements privately and voluntarily at a later time.

The applicant has stated that the access easements will not be included on the Final CSM and supports including the removal of the easements as a condition of approval.

The existing parcel is currently zoned Planned Unit Development (PUD) with an underlying zoning designation of Multi-Family Residential-30 (MRH-30). In order for the CSM to be approved, each of the proposed lots must meet the dimensional standards of the underlying MRH-30 zoning district.

**Lot 1**

| Bulk Regulation             | MRH-30 Standard | Proposed Parcel Dimensions |
|-----------------------------|-----------------|----------------------------|
| Minimum Lot Area            | 20,000 sf       | 156,249 sf (3.587 acres)   |
| Minimum Lot Width           | 100 feet        | 367 feet                   |
| Minimum Lot Depth           | 120 feet        | 659 feet                   |
| Minimum Lot Frontage at ROW | 50 feet         | 1000+ feet                 |

**Lot 2**

| Bulk Regulation             | MRM-30 Standard | Proposed Parcel Dimensions |
|-----------------------------|-----------------|----------------------------|
| Minimum Lot Area            | 20,000 sf       | 78,385 sf (1.7995 acres)   |
| Minimum Lot Width           | 100 feet        | 207 feet                   |
| Minimum Lot Depth           | 120 feet        | 410 feet                   |
| Minimum Lot Frontage at ROW | 50 feet         | 188 feet                   |

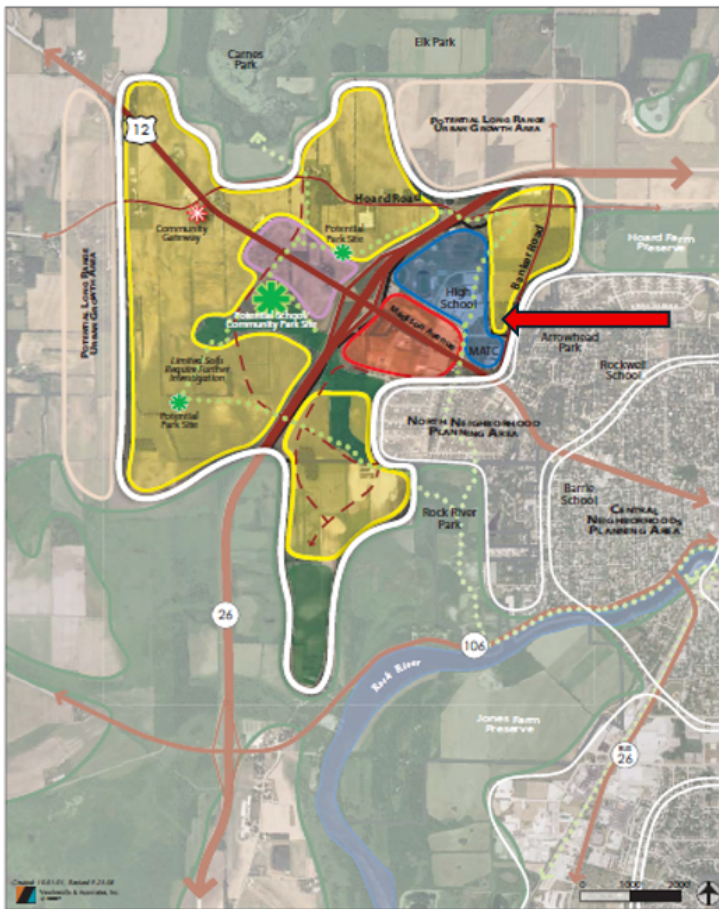
**Comprehensive Plan Review:**

The current parcel is in the Northwest Quadrant Planning Area. The City of Fort Atkinson Comprehensive Plan's Future Land Use Map shows this area as Planned Neighborhood.

# NORTHWEST QUADRANT PLANNING AREA

FIGURE: 2.12

CITY OF FORT ATKINSON  
FUTURES OPEN HOUSE



City Staff believe the current and proposed parcels are and will remain in concert with the City's Comprehensive Plan.

Public Notice is not required.

## DISCUSSION

The property owner has submitted a request to divide the existing parcel located at 1310 Campus Drive into two separate parcels through a Certified Survey Map (CSM). The property is currently governed by an approved Planned Unit Development (PUD), including a General Development Plan (GDP) and Specific Implementation Plan (SIP), which were approved by the Plan Commission and City Council in 2023.

Under the PUD framework, the GDP establishes the general zoning and development parameters for the site, while the SIP provides the detailed site design and implementation elements. While these approvals do not have a formal expiration date, modifications to the approved plans may require amendments depending on the nature and scale of the proposed changes.

The proposed land division would modify the existing lot configuration and reduce the total acreage associated with the approved development area from approximately 5.39 acres to 3.58 acres. Changes of this nature may affect several components of the previously approved development, including stormwater management, overall site density, and the ratios of building coverage and impervious surface area.

Due to the potential magnitude of these impacts, the proposed land division is considered a substantial change to the previously approved PUD plans. As a result, an amendment to the Specific Implementation Plan (SIP) will be required to evaluate how the revised parcel configuration affects the approved development layout and associated infrastructure. In addition, if the proposed lot division results in development ratios that exceed those permitted under the underlying Multi-Family Residential-30 (MRH-30) zoning district, an amendment to the General Development Plan (GDP) may also be required.

Because the GDP functions similarly to a zoning map amendment within the PUD framework, any amendment to the GDP would require review and recommendation by the Plan Commission and final consideration by the City Council.

Overall, the proposed CSM meets the requirements of the City's Land Division and Development Ordinance and the Dimensional Standards of the City's Zoning Ordinance. The CSM would also create an additional parcel that would be developable into additional residential units.

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## **RECOMMENDATION**

Staff recommends that the Plan Commission recommend the City Council approve this preliminary Certified Survey Map, subject to the following conditions:

- Adjust the final CSM to reflect City Council President Kyle Jaeckel under the City of Fort Atkinson Approval Certificate.
- Remove access easements from the Final CSM; noted as 7 and 8 in the Easement Notes of the submitted CSM.

---

## **ATTACHMENTS**

1. Tip of the Spear CSM\_2-26-2026
2. Application\_Redacted

# JEFFERSON COUNTY CERTIFIED SURVEY MAP #

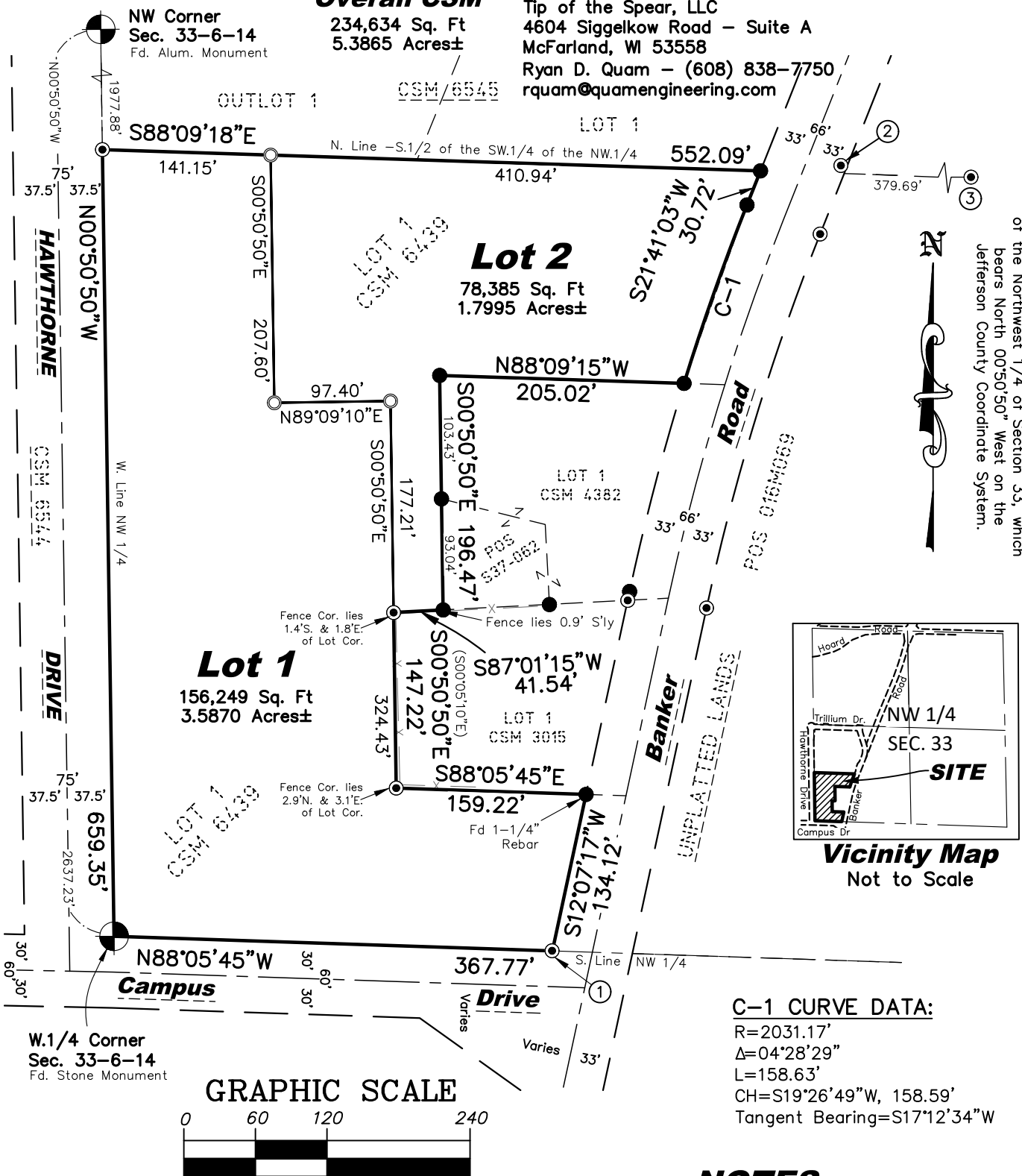
**Lot 1 of CSM 6439, being a part of the SW 1/4 of the NW 1/4 of Section 33, T6N., R14E., City of Fort Atkinson, Jefferson County, Wisconsin.**

### Overall CSM

234,634 Sq. Ft  
5.3865 Acres±

### Owner/Subdivider:

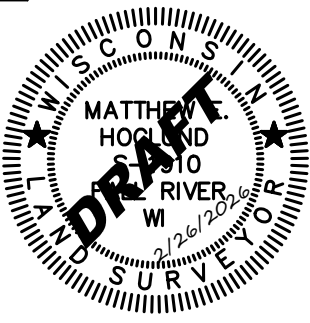
Tip of the Spear, LLC  
4604 Sigglekow Road – Suite A  
McFarland, WI 53558  
Ryan D. Quam – (608) 838-7750  
rquam@quamengineering.com



Bearings are referenced to the West line of the Northwest 1/4 of Section 33, which bears North 00°50'50" West on the Jefferson County Coordinate System.

### LEGEND

- Found 1-1/4" Iron Pipe
- Found 3/4" Rebar, Unless Noted
- 3/4" by 24" Iron Rebar Set Weighing 1.5 lbs./ft.
- (303.63') Record Data (if different)
- Boundary Line
- - - Existing R/W Line
- - - Platted Lot Line
- - - Sectional Subdivision Line
- - - Street Centerline



### NOTES

- ① Found IP lies N73°57'W, 0.31' from the corner
- ② Found IP lies N13°58'08"W, 2.27' from the corner
- ③ Found IP at the NW corner of Lot 4 of Berry Hill lies S88°09'18"E, 449.85' from the NE corner of this CSM.

SEE SHEET 2 FOR EASEMENT DETAILS.

### QUAM ENGINEERING, LLC

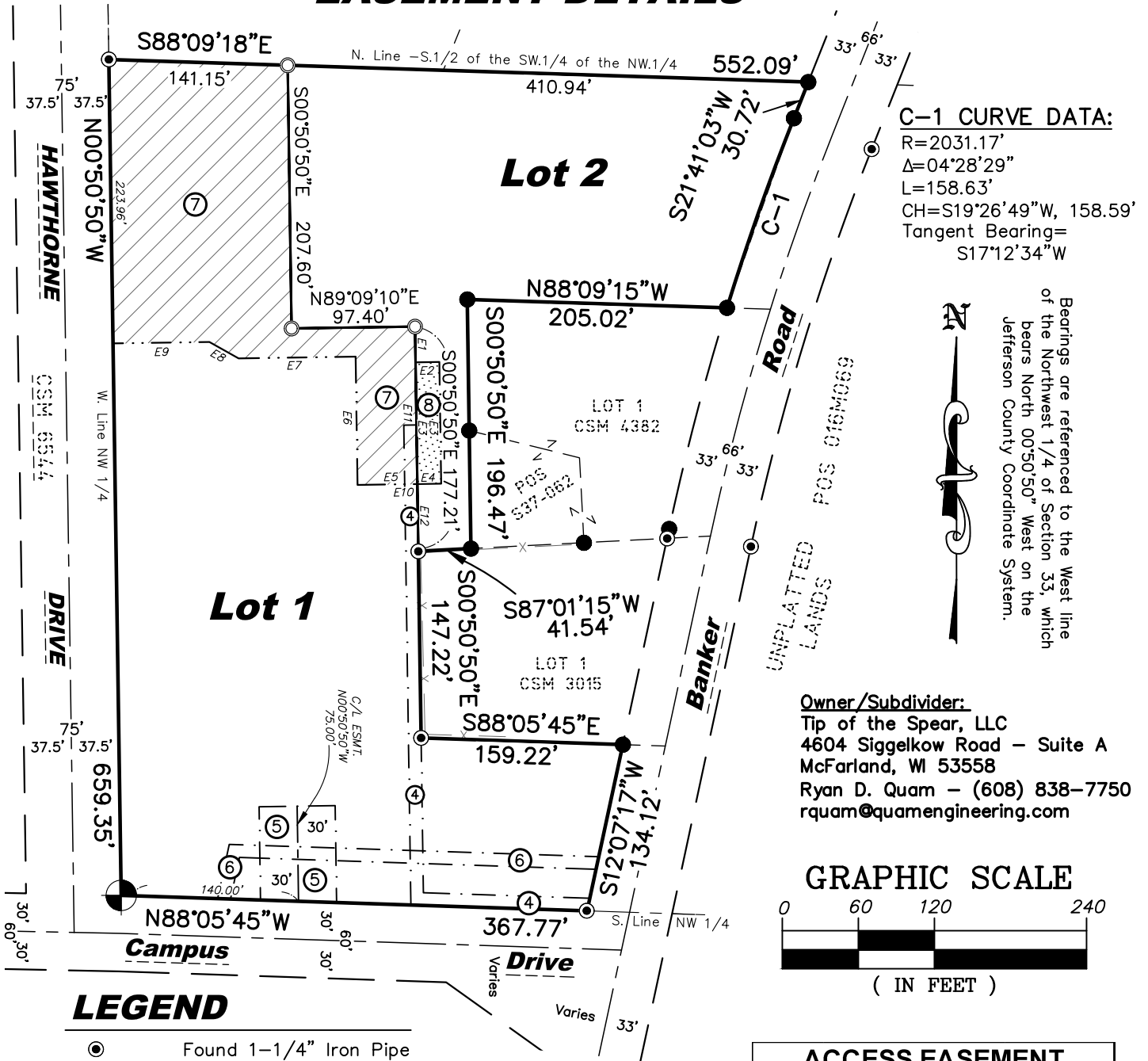
4604 SIGGLEKOW ROAD – SUITE A MCFARLAND, WI 53558  
608-838-7750 www.quamengineering.com  
Project # MC-37-20

Drawn By: MEH  
Project # MC-37-20

# JEFFERSON COUNTY CERTIFIED SURVEY MAP #

**Lot 1 of CSM 6439, being a part of the SW 1/4 of the NW 1/4 of Section 33,  
T6N., R14E., City of Fort Atkinson, Jefferson County, Wisconsin.**

## EASEMENT DETAILS



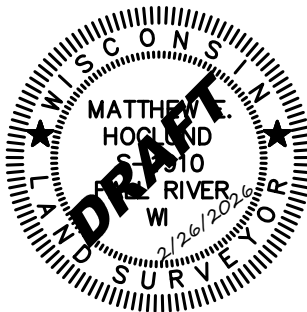
### LEGEND

- Found 1-1/4" Iron Pipe
- Found 3/4" Rebar, Unless Noted
- 3/4" by 24" Iron Rebar Set Weighing 1.5 lbs./ft.
- Boundary Line
- Existing R/W Line
- Platted Lot Line
- Sectional Subdivision Line
- Street Centerline
- Existing Easement Line
- Access Easement Line

### EASEMENT NOTES:

- ④ 10' W.E.P.CO. Easement per Doc. 943328
  - ⑤ 60' City of Fort Atkinson sanitary sewer, watermain & storm sewer Easement per Doc. 979516
  - ⑥ 10' W.E.P.CO. & Wis. Tel. Co. Easement per Vol. 479, P. 619
- The above easements 4 and 6 are in the process of being Released by separate instrument.
- ⑦ Access Easement for the benefit of Lot 2 to be conveyed by separate instrument. (CROSS Hatched)
  - ⑧ Access Easement for the benefit of Lot 1 to be conveyed by separate instrument. (DOT Hatched)

| ACCESS EASEMENT |             |         |
|-----------------|-------------|---------|
| ID              | BEARING     | LENGTH  |
| E1              | S00°50'50"E | 28.18'  |
| E2              | N89°09'10"E | 18.80'  |
| E3              | S00°50'50"E | 96.00'  |
| E4              | S89°09'10"W | 18.80'  |
| E5              | S89°09'10"W | 47.20'  |
| E6              | N00°50'50"W | 101.18' |
| E7              | S89°09'10"W | 92.30'  |
| E8              | N60°43'15"W | 26.44'  |
| E9              | S89°09'10"W | 76.03'  |
| E10             | S89°09'10"W | 66.00'  |
| E11             | S00°50'50"E | 124.18' |
| E12             | S00°50'50"E | 53.03'  |



Drawn By: MEH  
Project # MC-37-20

# JEFFERSON COUNTY CERTIFIED SURVEY MAP # \_\_\_\_\_

**Lot 1 of CSM 6439, being a part of the SW 1/4 of the NW 1/4 of Section 33,  
T6N., R14E., City of Fort Atkinson, Jefferson County, Wisconsin.**

## SURVEYOR'S CERTIFICATE:

I, Matthew E. Hoglund, Professional Land Surveyor, do hereby certify to the best of my knowledge and belief, that I have surveyed, divided, and mapped the following Certified Survey being Lot 1 of Jefferson County Certified Survey Map No. (CSM) 6439, recorded as Document No. 1480854 of Jefferson County Records, being a part of the Southwest one-quarter of the Northwest one-quarter of Section 33, Township 6 North, Range 14 East, City of Fort Atkinson, Jefferson County, Wisconsin.

The above-described parcel contains 234,634 square feet or 5.3865 acres, more or less, and is subject to all easements and agreements, if any, of record and/or fact.

I further certify, to the best of my knowledge and belief, that this map is a correct representation of all exterior boundaries of the land surveyed and the subdivision thereof made; that I have made such survey, land division, and map by the direction of Ryan Quam of Tip of the Spear, LLC, the owner of said land; that I have fully complied with the provisions of Chapter 236.34 of the Wisconsin State Statutes and the Land Division Ordinance of the City of Fort Atkinson in surveying, dividing, and mapping the same.

Dated this 26th day of February, 2026.



Quam Engineering, LLC  
By: Matthew E. Hoglund  
P.L.S. S-1910

## OWNER'S CERTIFICATE:

Tip of the Spear, LLC, a Wisconsin Limited Liability Company duly organized and existing under and by virtue of the laws of the State of Wisconsin, as owner, does hereby certify that said Company caused the land described on this Certified Survey Map to be surveyed, divided, mapped, and dedicated as represented on this Certified Survey Map. Tip of the Spear, LLC does also certify that this Certified Survey Map is required to be submitted to the City of Fort Atkinson for approval.

IN WITNESS WHEREOF, the said Tip of the Spear, LLC, has caused these presents to be signed by  
Ryan D. Quam, Member, at \_\_\_\_\_, Wisconsin, on this \_\_\_\_\_, day of  
\_\_\_\_\_, 20\_\_.

In the presence of: \_\_\_\_\_  
Ryan D. Quam, Member

STATE OF WISCONSIN)  
COUNTY DANE) SS

Personally came before me this \_\_\_ day of \_\_\_\_\_, 20\_\_, Ryan D. Quam, of the above named Company, to me known to be the person who executed the foregoing instrument, and to me known to be a Member of said Company and acknowledged that he executed the foregoing instrument as such officer as the deed of said company, by its authority.

(Notary Seal) \_\_\_\_\_ Notary Public, \_\_\_\_\_, Wisconsin

My commission expires \_\_\_\_\_.

C.S.M. No. \_\_\_\_\_

Doc. No. \_\_\_\_\_

Vol. \_\_\_\_\_ Page \_\_\_\_\_

Drawn By: MEH  
Project # MC-37-20

# JEFFERSON COUNTY CERTIFIED SURVEY MAP # \_\_\_\_\_

**Lot 1 of CSM 6439, being a part of the SW 1/4 of the NW 1/4 of Section 33,  
T6N., R14E., City of Fort Atkinson, Jefferson County, Wisconsin.**

### CONSENT OF CORPORATE MORTGAGEE:

Lake Ridge Bank, a bank duly organized and existing under and by virtue of the laws of the State of Wisconsin, as mortgagee of the above-described land, does hereby consent to the surveying, dividing, mapping, and dedication of the land described on this Certified Survey Map, and does hereby consent to the above certificate of Tip of the Spear, LLC, owner.

IN WITNESS WHEREOF, the said Lake Ridge Bank has caused these presents to be

signed by its authorized representative listed below at \_\_\_\_\_, Wisconsin and its corporate seal affixed on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_

By: \_\_\_\_\_ Title: \_\_\_\_\_

STATE OF WISCONSIN)  
\_\_\_\_\_ COUNTY) SS

Personally came before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_,  
\_\_\_\_\_, its \_\_\_\_\_ of the above named corporation, to me known to be the person(s) who executed the foregoing instrument, and to me known to be such authorized representative of said corporation, and acknowledged that \_\_\_\_\_ executed the foregoing instrument as such officer as the deed of said corporation, by its authority.

(Notary Seal) \_\_\_\_\_ Notary Public, \_\_\_\_\_, Wisconsin

My commission expires \_\_\_\_\_.

### CITY OF FORT ATKINSON APPROVAL CERTIFICATE:

Resolved, that this Certified Survey Map, Tip of the Spear, LLC, owner, is hereby approved by the City Council.

Date: \_\_\_\_\_ Approved \_\_\_\_\_  
Davin Lescohier - Council President

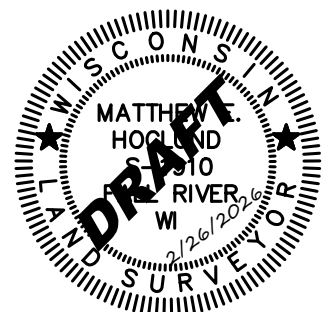
I hereby certify that the foregoing is a copy of a Resolution adopted by the City Council of the City of Fort Atkinson.

Date: \_\_\_\_\_ Signed \_\_\_\_\_  
Michelle Ebbert - City Clerk

### REGISTER OF DEEDS CERTIFICATE:

Received for recording this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, at \_\_\_\_\_ o'clock \_\_M. and recorded as Certified Survey Map No. \_\_\_\_\_ as Document No. \_\_\_\_\_.

Staci M. Hoffman, Jefferson County Register of Deeds





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

### City of Fort Atkinson Certified Survey Map Application

This form is designed to be used by the Applicant as a guide to submitting a complete application for review of a Certified Survey Map by the City to process the application.

APPLICANT Name, company, and client (if applicable): Ryan Quam for Tip of the Spear, LLC

Phone number: [REDACTED] Email: [REDACTED]

OWNER Name, company, and client (if applicable): Tip of the Spear, LLC

Phone number: (same) Email: (same)

Postal address for proposed CSM: 1310 Campus Drive

Parcel Identification Numbers Involved: 226-0614-3323-015

Brief description of proposed division or combination and purpose: Split the lot to allow development on the low side of the lot to be accessed from Campus Drive and to allow development on the high side of the lot to be accessed from Banker Road.

#### I Application Packet Requirements

The Applicant shall submit one electronic copy of the application.

- A map of the subject property to scale depicting: [See attached CSM unless noted](#)
  - All lands and boundaries for the parcel(s)
  - Current zoning of the subject property and its environs, and the jurisdiction(s) which maintains that control. [See "Attachment A"](#)
  - All lot dimensions of the subject property.
  - A graphic scale and a north arrow.
- Legal Description [See attached](#)
- All easements, setbacks or land restrictions on the parcel(s)  
[See attached CSM for easements - setback assigned in PUD process](#)




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

## II Process Checklist

- |   |                 |
|---|-----------------|
| <input checked="" type="checkbox"/> Application fee of \$100 plus \$10 per additional lot received by City Treasurer<br>- (Maximum \$150) | Date: <u>JW</u> |
| <input type="checkbox"/> Receipt of complete application packet by Zoning Administrator   | Date: _____     |
| <input type="checkbox"/> City Staff Review  | Date: _____     |
| <input type="checkbox"/> Plan Commission Public Hearing, review and recommendation  | Date: _____     |
| <input type="checkbox"/> City Council review and action   | Date: _____     |

Dated this 4<sup>th</sup> day of February, 20 26

Respectfully submitted,

  
(Signature of Applicant)



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Rebecca Houseman, City Manager

**RE:** Review and possible action relating to a General Consulting Services Agreement between the City of Fort Atkinson and Robert W. Baird & Co. Incorporated for the creation of Tax Increment District #11 (Houseman, City Manager)

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### BACKGROUND

The City Council is scheduled to close Tax Increment District (TID) #6 on March 17th prior to the April 15, 2026 deadline set by the Wisconsin Department of Revenue (DOR). For several years, the City has intended to create a new TID over the undeveloped and underdeveloped land within the Klement Business Park. The general consulting services agreement with Baird will facilitate the creation of TID #11.

### DISCUSSION

City staff proposes that TID #11 be a mixed-use TID and include the undeveloped and underdeveloped land in the Klement Business Park, as well as other adjacent land that could see additional future development. The Agreement with Baird will provide City staff, the Plan Commission, the Joint Review Board, and the City Council general consulting services to facilitate the creation of the TID, including:

- Creation of a timeline detailing the creation process
- Assist, develop, and compile the required project plan creation documentation for the TID
- Provide analysis for the evaluation of project plan creation
- Develop economic feasibility analysis of the TID
- Assist in discussions with potential developers
- Assist with creation of public notices, agendas, and resolutions for approval bodies
- Meet with City staff to facilitate analysis of the project plan
- Attend public meetings to present TID #11 project plans
- Assist the City in compiling the necessary documents for submissions to DOR

The draft creation schedule and general consulting services agreement are attached for City

Council review. This represents the first step in the creation process, and as one can see from the schedule, there will be multiple opportunities for input from the public, the Joint Review Board, the Plan Commission, and the City Council.

### **FINANCIAL ANALYSIS**

The fee included in the proposal from Baird is \$12,500. The last time the City entered into an agreement to create a TID was in May 2022 to create TIDs 9 and 10. At that time, the fee was \$8,750. Staff was able to work with Baird on a discount on the fees for the creation of TIDs #12 and #13, provided all three remain on the same schedule. The fee will be paid for by TID #11 when it is created later in 2026. Revenues and expenditures related to TID #11 will be tracked independently from the City's general fund through Fund 25.

City staff did not seek additional proposals for this work, as Baird is the City's financial advisor. City staff often seeks information, updated pro formas for all the TIDs, and other advice and counsel from Baird staff including Justin Fischer and Jennifer Engel. Baird has been an excellent partner of the City, and staff seeks to extend that relationship. Baird staff have proven themselves responsive, helpful, and trustworthy. The City pays Baird for prescribed work, such as TID creation and borrowing. However, aside from those upfront fees, the City does not pay Baird hourly or otherwise for consulting work relating to TIDs, creating and updating pro formas for possible developments, financial advice, preparation of debt updates for the City Council, and other services.

### **RECOMMENDATION**

Staff recommends that the City Council approve the General Consulting Services Agreement between the City of Fort Atkinson and Robert W. Baird & Co. for the creation of Tax Increment District #11 and authorize the City Manager to execute.

### **ATTACHMENTS**

1. General Consulting Services Agreement - Cy Fort Atkinson TIF 11
2. Revised tid 11 creation and TID 9 amendment timeline fort atkinson-draft

## GENERAL CONSULTING SERVICES AGREEMENT

THIS GENERAL CONSULTING SERVICES AGREEMENT (this “Agreement”) is entered as of this \_\_\_\_ day of \_\_\_\_\_, 2026 by and between City of Fort Atkinson (“Client”) and Robert W. Baird & Co. Incorporated (“Baird”).

### RECITALS:

WHEREAS, Client seeks to retain Baird to provide general consulting services and Baird desires to provide such services, on the terms set forth in this Agreement;

WHEREAS, Client understands and acknowledges that the services to be provided under this Agreement are not municipal advisory, underwriting or other services that are directly related to any specific financings or offerings; and

WHEREAS, Client’s decision to retain Baird to provide general consulting services and Client’s execution and delivery of this Agreement have been approved by all necessary action on the part of Client.

NOW THEREFORE, the parties hereto agree as follows:

### **I. Scope of Work**

Baird shall provide the following general consulting services to Client, if and when requested by Client:

#### TIF District Number 11

- Creation of a timeline detailing the creation process
- Assist, develop and compile the required project plan creation documentation for the TID
- Provide analysis for the evaluation of project plan creation
- Develop economic feasibility analysis of the TID evaluating current TID and forward looking TID analyses
- Assist in discussions with potential developers
- Assist with creation of public notices/agendas/resolutions for JRB, Public Hearing, and City Council meetings.
- Meet with City staff (in person or electronically) to facilitate analysis/discussion of the TIF District #11 project plans
- Attend public meetings (in person or electronically) to present the TIF District #11 project plans
- Assist the City in compiling the necessary documents for submissions to DOR

### **II. Municipal Advisory or Underwriting Services**

This Agreement pertains only to general consulting services and expressly does not cover any municipal advisory, underwriting or other services that are directly related to any specific financings or offerings. Client understands that the term “municipal advisory services” means any municipal advisory or consultant services with respect to an issuance of securities, including advice with respect to the structure, timing, terms and other similar matters concerning such issuance.

If Client proposes, determines or undertakes to effect an issuance of municipal securities at any time during the term of this Agreement, Client may engage Baird as municipal advisor, underwriter, or placement agent with respect to such issuance. If Client determines to so engage Baird and Baird determines to accept such engagement, Client and Baird would enter into a separate written municipal advisory, underwriting, or placement agent engagement letter. Client understands that if Baird serves as municipal advisor in connection with an offering, Baird will not be able to bid or otherwise underwrite or serve as agent for the placement of the securities. Client also understands that if Baird acts as underwriter or placement agent on an offering, Baird may not also serve as municipal advisor on that offering but, in the course of acting as underwriter or placement agent, may render advice to Client, including advice with respect to the structure, timing, terms and other similar matters concerning the offering. Client further understands that Baird’s primary role as underwriter would be to purchase securities in an arm’s-length commercial transaction between Client and Baird and as placement agent, Baird’s primary role would be to place or facilitate or arrange for the placement of securities by Client with purchasers in an arm’s-length commercial transaction. Baird, as underwriter or placement agent, would have financial and other interests that differ from those of Client.

### **III. Compensation and Terms of Payment**

For the general consulting services provided hereunder, Client shall pay Baird the following compensation:  
A fixed fee equal to \$12,500, which fee shall be paid within 10 business days upon completion of the Scope of Work as outlined above.

Baird will be responsible for paying all out-of-pocket costs and expenses it incurs that relate to the general consulting service it provides hereunder.

Any fees payable hereunder for general consulting services will be fully credited against any fees paid to Baird for municipal advisory or underwriting services provided to Client by Baird during the term of this Agreement.

### **IV. Information to Be Furnished to Baird**

All information, data, reports and records necessary for performing under this Agreement shall be furnished to Baird without charge by Client, and Client shall provide such cooperation as Baird may reasonably request to assist Baird in providing the services hereunder. Baird is not responsible for the accuracy of the assumptions or data provided by Client or any unforeseen changes in key factors such as state funding levels or revenue limits and their impact.

### **V. Indemnification; Limitation of Liability**

Client agrees that neither Baird nor its employees, officers, agents, or affiliates shall have any liability to Client for the services provided hereunder except to the extent it is judicially determined that Baird engaged in negligence or willful misconduct and such negligence or willful misconduct is the sole cause of any damages incurred by Client in connection with this Agreement. Client agrees that Baird's maximum liability, if any, under this Agreement will be limited to \$12,500.

### **VI. Term of the Agreement**

This Agreement shall become effective on the date hereof and shall continue unless and until terminated by either party upon at least 30 days written notice to the other party.

Upon termination of this Agreement, Baird shall be entitled to just and equitable compensation for any services provided prior to such termination for which Baird has not previously received compensation.

### **VII. Non-Discrimination**

Baird, as the supplier of general consulting services covered by this Agreement, will not discriminate in any way in connection with the Agreement in the employment of persons, or refuse to continue the employment of any person, on account of the race, creed, color, sex, national origin, or other protected class of such person or persons.

### **VIII. Miscellaneous**

This Agreement shall be governed by and construed in accordance with the laws of the State of Wisconsin. This Agreement may not be amended or modified except by means of a written instrument executed by both parties hereto. This Agreement may not be assigned by either party without the prior written consent of the other party. This Agreement represents the entire agreement and understanding of the parties with respect to the subject matter hereof and supersedes any prior or contemporaneous agreements, arrangements, understandings, negotiations and discussions between the parties involving such subject matter, whether oral or written, express or implied. Baird is registered as a municipal advisor with the Securities Exchange Commission and Municipal Securities Rulemaking Board.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date first written above.

**Client - City of Fort Atkinson**

By: \_\_\_\_\_

Ms. Rebecca Houseman, City of Fort Atkinson

**Robert W. Baird & Co. Incorporated**

By:  \_\_\_\_\_

Ms. Jennifer Engel, Vice President  
cc: Mr. Justin Fischer, Managing Director

# City of Fort Atkinson

## *Timeline for TID#11 Creation and TID #9 Territory Amendment - Mixed-Use Districts*



|                                       |  |
|---------------------------------------|--|
| <i>Monday, June 29, 2026</i> .....    | Consulting service agreement executed. Direction to proceed.   |
| <i>Monday, July 6, 2026</i> .....     | Preliminary project plan template available for City staff review (maps excluded).   |
| <i>Friday, July 10, 2026</i> .....    | TID boundaries finalized.  |
| <i>Wednesday, July 22, 2026</i> ..... | Mapping complete and delivered to Baird.   |
| <i>Monday, July 27, 2026</i> .....    | Baird compiles draft project plan.   |
| <i>Friday, July 31, 2026</i> .....    | Final comments/changes to draft project plan.  |
| <i>Tuesday, August 4, 2026</i> .....  | Class 1 Notice of Joint Review Board (JRB) Meeting and Class II Notice of Public Hearing due to City official newspaper.   |
| <i>Tuesday, August 4, 2026</i> .....  | Draft version of the project plan available for public review/distribution.  |
| <i>Tuesday, August 4, 2026</i> .....  | Copy of the Notice of Public Hearing sent via First Class mail, from the City to all taxing entities (county, school, and technical college district officials).<br>Must occur at least 15 days prior to public hearing and before first publication of Class II notice.<br><br>Provide DOR with copies of the cover letters that were sent with the notices or a clerk’s certification that the letters and notices were distributed on the same date.<br><br>(After Project Plan is available & before publication date) |
| <i>Tuesday, August 11, 2026</i> ..... | First publication of Class II Notice of Public Hearing (1 <sup>st</sup> & 2 <sup>nd</sup> notice must occur in 2 consecutive weeks). Publication date for notices/hearings of City official newspaper.<br>Publication of Class I Notice of Joint Review Board Meeting (Must be published at least 5 days prior to the JRB meeting).<br><br>(After Notice of Public Hearing is sent out)  |

|  |   |
|--|---|
| <i>Tuesday, August 18, 2026.....</i>       | Second publication of Class II Notice of Public Hearing. Provide DOR with readable copies of the public hearing notices and an affidavit of publication from the newspaper indicating both dates of publication. (Must be at least 7 days prior to Public Hearing). |
| <i>Monday, August 24, 2026.....</i>        | JRB holds its first meeting. Board’s Chairperson and public member are selected (must be within 14 days after the notice publication, before public hearing).   |
| <i>Tuesday, August 25, 2026.....</i>       | Public hearing regarding the project plan/project plan amendments. Must be held at least one week (7 days) after second publication of public hearing notice.   |
| <i>Tuesday, August 25, 2026.....</i>       | Plan Commission adopts resolution and submits it to the City Council for approval.  |
| <i>Tuesday, September 15, 2026 .....</i>   | Class I notice of JRB meeting due to newspaper.   |
| <i>Tuesday, September 15, 2026.....</i>    | City Council considers Plan Commission recommendation. Project plan approved. City Council adopts resolution. Clerk provides the JRB with a copy of the resolution and financial information.<br><br>(No sooner than 14 days after the public hearing)              |
| <i>Tuesday, September 22, 2026.....</i>    | Publication of Class I Notice of JRB meeting (must be published at least 5 days prior to the JRB meeting).  |
| <i>Tuesday, September 29, 2026 .....</i>   | Final action by JRB.<br><br>(Within 45 Days after receiving Resolution)   |
| <i>Friday, October 2, 2026 .....</i>       | JRB notifies the City of its decision. <i>(Within 7 Days of JRB action)</i>   |
| <i>Submitted by October 30, 2026 .....</i> | Submit written notice to DOR of TID approval. <i>(Within 60 Days of Approval)</i>   |
| <i>Submitted by October 30, 2026.....</i>  | Submit completed application to DOR for base value certification.   |



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Rebecca Houseman, City Manager

**RE:** Review and possible action relating to a General Consulting Services Agreement between the City of Fort Atkinson and Robert W. Baird & Co. Incorporated for the creation of Tax Increment District #12 (Houseman, City Manager)

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### BACKGROUND

The City Council is scheduled to close Tax Increment District (TID) #7 on March 17th prior to the April 15, 2026 deadline set by the Wisconsin Department of Revenue (DOR). For several years, the City has intended to create one or two new TIDs in the City's downtown with the goal of encouraging development or redevelopment of those parcels. This general consulting services agreement with Baird will facilitate the creation of TID #12, which will be located in the City's downtown on the north side of the Rock River.

### DISCUSSION

City staff proposes that TID #12 be a blight elimination TID even though not all of the parcels in the TID will be considered blighted. The designation as a blight elimination TID extends the life of the TID to 27 years, which will offer more opportunity to support private development and fund public infrastructure. The Agreement with Baird will provide City staff, the Plan Commission, the Joint Review Board, and the City Council general consulting services to facilitate the creation of the TID, including:

- Creation of a timeline detailing the creation process
- Assist, develop, and compile the required project plan creation documentation for the TID
- Provide analysis for the evaluation of project plan creation
- Develop economic feasibility analysis of the TID
- Assist in discussions with potential developers
- Assist with creation of public notices, agendas, and resolutions for approval bodies
- Meet with City staff to facilitate analysis of the project plan
- Attend public meetings to present TID #12 project plans
- Assist the City in compiling the necessary documents for submissions to DOR

The draft creation schedule and general consulting services agreement are attached for City Council review. This represents the first step in the creation process, and as one can see from the schedule, there will be multiple opportunities for input from the public, the Joint Review Board, the Plan Commission, and the City Council.

### **FINANCIAL ANALYSIS**

The fee included in the proposal from Baird is \$9,500, which represents a discount if creating this TID alongside TID #11. The fee will be paid for by TID #12 when it is created later in 2026. TID #12 revenues and expenditures will be tracked independently from the City's general fund in Fund 26.

City staff did not seek additional proposals for this work, as Baird is the City's financial advisor. City staff often seeks information, updated pro formas for all the TIDs, and other advice and counsel from Baird staff including Justin Fischer and Jennifer Engel. Baird has been an excellent partner of the City, and staff seeks to extend that relationship. Baird staff have proven themselves responsive, helpful, and trustworthy. The City pays Baird for prescribed work, such as TID creation and borrowing. However, aside from those upfront fees, the City does not pay Baird hourly or otherwise for consulting work relating to TIDs, creating and updating pro formas for possible developments, financial advice, preparation of debt updates for the City Council, and other services.

### **RECOMMENDATION**

Staff recommends that the City Council approve the General Consulting Services Agreement between the City of Fort Atkinson and Robert W. Baird & Co. for the creation of Tax Increment District #12 and authorize the City Manager to execute.

### **ATTACHMENTS**

1. General Consulting Services Agreement - Cy Fort Atkinson TIF 12
2. tid 12 and 13 creation timeline fort atkinson-draft

## GENERAL CONSULTING SERVICES AGREEMENT

THIS GENERAL CONSULTING SERVICES AGREEMENT (this “Agreement”) is entered as of this \_\_\_\_ day of \_\_\_\_\_, 2026 by and between City of Fort Atkinson (“Client”) and Robert W. Baird & Co. Incorporated (“Baird”).

### RECITALS:

WHEREAS, Client seeks to retain Baird to provide general consulting services and Baird desires to provide such services, on the terms set forth in this Agreement;

WHEREAS, Client understands and acknowledges that the services to be provided under this Agreement are not municipal advisory, underwriting or other services that are directly related to any specific financings or offerings; and

WHEREAS, Client’s decision to retain Baird to provide general consulting services and Client’s execution and delivery of this Agreement have been approved by all necessary action on the part of Client.

NOW THEREFORE, the parties hereto agree as follows:

### **I. Scope of Work**

Baird shall provide the following general consulting services to Client, if and when requested by Client:

#### TIF District Number 12

- Creation of a timeline detailing the creation process
- Assist, develop and compile the required project plan creation documentation for the TID
- Provide analysis for the evaluation of project plan creation
- Develop economic feasibility analysis of the TID evaluating current TID and forward looking TID analyses
- Assist in discussions with potential developers
- Assist with creation of public notices/agendas/resolutions for JRB, Public Hearing, and City Council meetings.
- Meet with City staff (in person or electronically) to facilitate analysis/discussion of the TIF District #12 project plans
- Attend public meetings (in person or electronically) to present the TIF District #12 project plans
- Assist the City in compiling the necessary documents for submissions to DOR

### **II. Municipal Advisory or Underwriting Services**

This Agreement pertains only to general consulting services and expressly does not cover any municipal advisory, underwriting or other services that are directly related to any specific financings or offerings. Client understands that the term “municipal advisory services” means any municipal advisory or consultant services with respect to an issuance of securities, including advice with respect to the structure, timing, terms and other similar matters concerning such issuance.

If Client proposes, determines or undertakes to effect an issuance of municipal securities at any time during the term of this Agreement, Client may engage Baird as municipal advisor, underwriter, or placement agent with respect to such issuance. If Client determines to so engage Baird and Baird determines to accept such engagement, Client and Baird would enter into a separate written municipal advisory, underwriting, or placement agent engagement letter. Client understands that if Baird serves as municipal advisor in connection with an offering, Baird will not be able to bid or otherwise underwrite or serve as agent for the placement of the securities. Client also understands that if Baird acts as underwriter or placement agent on an offering, Baird may not also serve as municipal advisor on that offering but, in the course of acting as underwriter or placement agent, may render advice to Client, including advice with respect to the structure, timing, terms and other similar matters concerning the offering. Client further understands that Baird’s primary role as underwriter would be to purchase securities in an arm’s-length commercial transaction between Client and Baird and as placement agent, Baird’s primary role would be to place or facilitate or arrange for the placement of securities by Client with purchasers in an arm’s-length commercial transaction. Baird, as underwriter or placement agent, would have financial and other interests that differ from those of Client.

### **III. Compensation and Terms of Payment**

For the general consulting services provided hereunder, Client shall pay Baird the following compensation:

A fixed fee equal to \$9,500 (if done on same timeline as TID 11), which fee shall be paid within 10 business days upon completion of the Scope of Work as outlined above.

Baird will be responsible for paying all out-of-pocket costs and expenses it incurs that relate to the general consulting service it provides hereunder.

Any fees payable hereunder for general consulting services will be fully credited against any fees paid to Baird for municipal advisory or underwriting services provided to Client by Baird during the term of this Agreement.

### **IV. Information to Be Furnished to Baird**

All information, data, reports and records necessary for performing under this Agreement shall be furnished to Baird without charge by Client, and Client shall provide such cooperation as Baird may reasonably request to assist Baird in providing the services hereunder. Baird is not responsible for the accuracy of the assumptions or data provided by Client or any unforeseen changes in key factors such as state funding levels or revenue limits and their impact.

### **V. Indemnification; Limitation of Liability**

Client agrees that neither Baird nor its employees, officers, agents, or affiliates shall have any liability to Client for the services provided hereunder except to the extent it is judicially determined that Baird engaged in negligence or willful misconduct and such negligence or willful misconduct is the sole cause of any damages incurred by Client in connection with this Agreement. Client agrees that Baird's maximum liability, if any, under this Agreement will be limited to \$9,500.

### **VI. Term of the Agreement**

This Agreement shall become effective on the date hereof and shall continue unless and until terminated by either party upon at least 30 days written notice to the other party.

Upon termination of this Agreement, Baird shall be entitled to just and equitable compensation for any services provided prior to such termination for which Baird has not previously received compensation.

### **VII. Non-Discrimination**

Baird, as the supplier of general consulting services covered by this Agreement, will not discriminate in any way in connection with the Agreement in the employment of persons, or refuse to continue the employment of any person, on account of the race, creed, color, sex, national origin, or other protected class of such person or persons.

### **VIII. Miscellaneous**

This Agreement shall be governed by and construed in accordance with the laws of the State of Wisconsin. This Agreement may not be amended or modified except by means of a written instrument executed by both parties hereto. This Agreement may not be assigned by either party without the prior written consent of the other party. This Agreement represents the entire agreement and understanding of the parties with respect to the subject matter hereof and supersedes any prior or contemporaneous agreements, arrangements, understandings, negotiations and discussions between the parties involving such subject matter, whether oral or written, express or implied. Baird is registered as a municipal advisor with the Securities Exchange Commission and Municipal Securities Rulemaking Board.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date first written above.

**Client - City of Fort Atkinson**

By: \_\_\_\_\_

Ms. Rebecca Houseman, City of Fort Atkinson

**Robert W. Baird & Co. Incorporated**

By:  \_\_\_\_\_

Ms. Jennifer Engel, Vice President  
cc: Mr. Justin Fischer, Managing Director

# City of Fort Atkinson

## TID#12 and #13 Creation Timeline - Blighted



|                                       |  |
|---------------------------------------|--|
| <i>Monday, June 29, 2026</i> .....    | Consulting service agreement executed. Direction to proceed.   |
| <i>Monday, July 6, 2026</i> .....     | Preliminary project plan template available for City staff review (maps excluded).   |
| <i>Friday, July 10, 2026</i> .....    | TID boundaries finalized.  |
| <i>Wednesday, July 22, 2026</i> ..... | Mapping complete and delivered to Baird.   |
| <i>Monday, July 27, 2026</i> .....    | Baird compiles draft project plan.   |
| <i>Friday, July 31, 2026</i> .....    | Final comments/changes to draft project plan.  |
| <i>Tuesday, August 4, 2026</i> .....  | Class 1 Notice of Joint Review Board (JRB) Meeting and Class II Notice of Public Hearing due to City official newspaper.   |
| <i>Tuesday, August 4, 2026</i> .....  | Draft version of the project plan available for public review/distribution.  |
| <i>Tuesday, August 4, 2026</i> .....  | Copy of the Notice of Public Hearing sent via First Class mail, from the City to all taxing entities (county, school, and technical college district officials).<br>For a Blight District creation, letters sent to all owners within the TID. All other TID creations, letter sent to property owners is optional but highly encouraged. Include parcel numbers on the letters.<br>Must occur at least 15 days prior to public hearing and before first publication of Class II notice.<br>Provide DOR with copies of the cover letters that were sent with the notices or a clerk's certification that the letters and notices were distributed on the same date.<br>(After Project Plan is available & before publication date) |

|  |   |
|--|---|
| <i>Tuesday, August 11, 2026</i> .....      | First publication of Class II Notice of Public Hearing (1 <sup>st</sup> & 2 <sup>nd</sup> notice must occur in 2 consecutive weeks). Publication date for notices/hearings of City official newspaper. Publication of Class I Notice of Joint Review Board Meeting (Must be published at least 5 days prior to the JRB meeting.<br>(After Notice of Public Hearing is sent out) |
| <i>Tuesday, August 18, 2026</i> .....      | Second publication of Class II Notice of Public Hearing. Provide DOR with readable copies of the public hearing notices and an affidavit of publication from the newspaper indicating both dates of publication. (Must be at least 7 days prior to Public Hearing).   |
| <i>Monday, August 24, 2026</i> .....       | JRB holds its first meeting. Board’s Chairperson and public member are selected (must be within 14 days after the notice publication, before public hearing).   |
| <i>Tuesday, August 25, 2026</i> .....      | Public hearing regarding the project plan. Must be held at least one week (7 days) after second publication of public hearing notice.   |
| <i>Tuesday, August 25, 2026</i> .....      | Plan Commission adopts resolution and submits it to the City Council for approval.  |
| <i>Tuesday, September 15, 2026</i> .....   | Class I notice of JRB meeting due to newspaper.   |
| <i>Tuesday, September 15, 2026</i> .....   | City Council considers Plan Commission recommendation. Project plan approved. City Council adopts resolution. Clerk provides the JRB with a copy of the resolution and financial information.<br><br>(No sooner than 14 days after the public hearing)  |
| <i>Tuesday, September 22, 2026</i> .....   | Publication of Class I Notice of JRB meeting (must be published at least 5 days prior to the JRB meeting).  |
| <i>Tuesday, September 29, 2026</i> .....   | Final action by JRB.<br><br>(Within 45 Days after receiving Resolution)   |
| <i>Friday, October 2, 2026</i> .....       | JRB notifies the City of its decision. ( <i>Within 7 Days of JRB action</i> )   |
| <i>Submitted by October 30, 2026</i> ..... | Submit written notice to DOR of TID approval. ( <i>Within 60 Days of Approval</i> )   |
| <i>Submitted by October 30, 2026</i> ..... | Submit completed application to DOR for base value certification.   |



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Rebecca Houseman, City Manager

**RE:** Review and possible action relating to a General Consulting Services Agreement between the City of Fort Atkinson and Robert W. Baird & Co. Incorporated for the creation of Tax Increment District #13 (Houseman, City Manager)

---

### BACKGROUND

The City Council is scheduled to close Tax Increment District (TID) #7 on March 17th prior to the April 15, 2026 deadline set by the Wisconsin Department of Revenue (DOR). For several years, the City has intended to create one or two new TIDs in the City's downtown with the goal of encouraging development or redevelopment of those parcels. The general consulting services agreement with Baird will facilitate the creation of TID #13, which will be located in the City's downtown on the south side of the Rock River.

### DISCUSSION

City staff proposes that TID #13 be a blight elimination TID even though not all of the parcels in the TID will be considered blighted. The designation as a blight elimination TID extends the life of the TID to 27 years, which will offer more opportunity to support private development and fund public infrastructure. The Agreement with Baird will provide City staff, the Plan Commission, the Joint Review Board, and the City Council general consulting services to facilitate the creation of the TID, including:

- Creation of a timeline detailing the creation process
- Assist, develop, and compile the required project plan creation documentation for the TID
- Provide analysis for the evaluation of project plan creation
- Develop economic feasibility analysis of the TID
- Assist in discussions with potential developers
- Assist with creation of public notices, agendas, and resolutions for approval bodies
- Meet with City staff to facilitate analysis of the project plan
- Attend public meetings to present TID #13 project plans
- Assist the City in compiling the necessary documents for submissions to DOR

The draft creation schedule and general consulting services agreement are attached for City Council review. This represents the first step in the creation process, and as one can see from the schedule, there will be multiple opportunities for input from the public, the Joint Review Board, the Plan Commission, and the City Council.

### **FINANCIAL ANALYSIS**

The fee included in the proposal from Baird is \$9,500, which represents a discount if creating this TID alongside TID #11. The fee will be paid for by TID #13 when it is created later in 2026. TID #13 revenues and expenditures will be tracked independently from the City's general fund in Fund 27.

City staff did not seek additional proposals for this work, as Baird is the City's financial advisor. City staff often seeks information, updated pro formas for all the TIDs, and other advice and counsel from Baird staff including Justin Fischer and Jennifer Engel. Baird has been an excellent partner of the City, and staff seeks to extend that relationship. Baird staff have proven themselves responsive, helpful, and trustworthy. The City pays Baird for prescribed work, such as TID creation and borrowing. However, aside from those upfront fees, the City does not pay Baird hourly or otherwise for consulting work relating to TIDs, creating and updating pro formas for possible developments, financial advice, preparation of debt updates for the City Council, and other services.

### **RECOMMENDATION**

Staff recommends that the City Council approve the General Consulting Services Agreement between the City of Fort Atkinson and Robert W. Baird & Co. for the creation of Tax Increment District #13 and authorize the City Manager to execute.

### **ATTACHMENTS**

1. General Consulting Services Agreement - Cy Fort Atkinson TIF 13
2. tid 12 and 13 creation timeline fort atkinson-draft

## GENERAL CONSULTING SERVICES AGREEMENT

THIS GENERAL CONSULTING SERVICES AGREEMENT (this “Agreement”) is entered as of this \_\_\_\_ day of \_\_\_\_\_, 2026 by and between City of Fort Atkinson (“Client”) and Robert W. Baird & Co. Incorporated (“Baird”).

### RECITALS:

WHEREAS, Client seeks to retain Baird to provide general consulting services and Baird desires to provide such services, on the terms set forth in this Agreement;

WHEREAS, Client understands and acknowledges that the services to be provided under this Agreement are not municipal advisory, underwriting or other services that are directly related to any specific financings or offerings; and

WHEREAS, Client’s decision to retain Baird to provide general consulting services and Client’s execution and delivery of this Agreement have been approved by all necessary action on the part of Client.

NOW THEREFORE, the parties hereto agree as follows:

### **I. Scope of Work**

Baird shall provide the following general consulting services to Client, if and when requested by Client:

#### TIF District Number 13

- Creation of a timeline detailing the creation process
- Assist, develop and compile the required project plan creation documentation for the TID
- Provide analysis for the evaluation of project plan creation
- Develop economic feasibility analysis of the TID evaluating current TID and forward looking TID analyses
- Assist in discussions with potential developers
- Assist with creation of public notices/agendas/resolutions for JRB, Public Hearing, and City Council meetings.
- Meet with City staff (in person or electronically) to facilitate analysis/discussion of the TIF District #13 project plans
- Attend public meetings (in person or electronically) to present the TIF District #13 project plans
- Assist the City in compiling the necessary documents for submissions to DOR

### **II. Municipal Advisory or Underwriting Services**

This Agreement pertains only to general consulting services and expressly does not cover any municipal advisory, underwriting or other services that are directly related to any specific financings or offerings. Client understands that the term “municipal advisory services” means any municipal advisory or consultant services with respect to an issuance of securities, including advice with respect to the structure, timing, terms and other similar matters concerning such issuance.

If Client proposes, determines or undertakes to effect an issuance of municipal securities at any time during the term of this Agreement, Client may engage Baird as municipal advisor, underwriter, or placement agent with respect to such issuance. If Client determines to so engage Baird and Baird determines to accept such engagement, Client and Baird would enter into a separate written municipal advisory, underwriting, or placement agent engagement letter. Client understands that if Baird serves as municipal advisor in connection with an offering, Baird will not be able to bid or otherwise underwrite or serve as agent for the placement of the securities. Client also understands that if Baird acts as underwriter or placement agent on an offering, Baird may not also serve as municipal advisor on that offering but, in the course of acting as underwriter or placement agent, may render advice to Client, including advice with respect to the structure, timing, terms and other similar matters concerning the offering. Client further understands that Baird’s primary role as underwriter would be to purchase securities in an arm’s-length commercial transaction between Client and Baird and as placement agent, Baird’s primary role would be to place or facilitate or arrange for the placement of securities by Client with purchasers in an arm’s-length commercial transaction. Baird, as underwriter or placement agent, would have financial and other interests that differ from those of Client.

### **III. Compensation and Terms of Payment**

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Baird will be responsible for paying all out-of-pocket costs and expenses it incurs that relate to the general consulting service it provides hereunder.

Any fees payable hereunder for general consulting services will be fully credited against any fees paid to Baird for municipal advisory or underwriting services provided to Client by Baird during the term of this Agreement.

### **IV. Information to Be Furnished to Baird**

All information, data, reports and records necessary for performing under this Agreement shall be furnished to Baird without charge by Client, and Client shall provide such cooperation as Baird may reasonably request to assist Baird in providing the services hereunder. Baird is not responsible for the accuracy of the assumptions or data provided by Client or any unforeseen changes in key factors such as state funding levels or revenue limits and their impact.

### **V. Indemnification; Limitation of Liability**

Client agrees that neither Baird nor its employees, officers, agents, or affiliates shall have any liability to Client for the services provided hereunder except to the extent it is judicially determined that Baird engaged in negligence or willful misconduct and such negligence or willful misconduct is the sole cause of any damages incurred by Client in connection with this Agreement. Client agrees that Baird's maximum liability, if any, under this Agreement will be limited to \$9,500.

### **VI. Term of the Agreement**

This Agreement shall become effective on the date hereof and shall continue unless and until terminated by either party upon at least 30 days written notice to the other party.

Upon termination of this Agreement, Baird shall be entitled to just and equitable compensation for any services provided prior to such termination for which Baird has not previously received compensation.

### **VII. Non-Discrimination**

Baird, as the supplier of general consulting services covered by this Agreement, will not discriminate in any way in connection with the Agreement in the employment of persons, or refuse to continue the employment of any person, on account of the race, creed, color, sex, national origin, or other protected class of such person or persons.

### **VIII. Miscellaneous**

This Agreement shall be governed by and construed in accordance with the laws of the State of Wisconsin. This Agreement may not be amended or modified except by means of a written instrument executed by both parties hereto. This Agreement may not be assigned by either party without the prior written consent of the other party. This Agreement represents the entire agreement and understanding of the parties with respect to the subject matter hereof and supersedes any prior or contemporaneous agreements, arrangements, understandings, negotiations and discussions between the parties involving such subject matter, whether oral or written, express or implied. Baird is registered as a municipal advisor with the Securities Exchange Commission and Municipal Securities Rulemaking Board.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date first written above.

**Client - City of Fort Atkinson**

By: \_\_\_\_\_

Ms. Rebecca Houseman, City of Fort Atkinson

**Robert W. Baird & Co. Incorporated**

By:  \_\_\_\_\_

Ms. Jennifer Engel, Vice President  
cc: Mr. Justin Fischer, Managing Director

# City of Fort Atkinson

## TID#12 and #13 Creation Timeline - Blighted



|                                       |  |
|---------------------------------------|--|
| <i>Monday, June 29, 2026</i> .....    | Consulting service agreement executed. Direction to proceed.   |
| <i>Monday, July 6, 2026</i> .....     | Preliminary project plan template available for City staff review (maps excluded).   |
| <i>Friday, July 10, 2026</i> .....    | TID boundaries finalized.  |
| <i>Wednesday, July 22, 2026</i> ..... | Mapping complete and delivered to Baird.   |
| <i>Monday, July 27, 2026</i> .....    | Baird compiles draft project plan.   |
| <i>Friday, July 31, 2026</i> .....    | Final comments/changes to draft project plan.  |
| <i>Tuesday, August 4, 2026</i> .....  | Class 1 Notice of Joint Review Board (JRB) Meeting and Class II Notice of Public Hearing due to City official newspaper.   |
| <i>Tuesday, August 4, 2026</i> .....  | Draft version of the project plan available for public review/distribution.  |
| <i>Tuesday, August 4, 2026</i> .....  | Copy of the Notice of Public Hearing sent via First Class mail, from the City to all taxing entities (county, school, and technical college district officials).<br>For a Blight District creation, letters sent to all owners within the TID. All other TID creations, letter sent to property owners is optional but highly encouraged. Include parcel numbers on the letters.<br>Must occur at least 15 days prior to public hearing and before first publication of Class II notice.<br>Provide DOR with copies of the cover letters that were sent with the notices or a clerk's certification that the letters and notices were distributed on the same date.<br>(After Project Plan is available & before publication date) |

|  |   |
|--|---|
| <i>Tuesday, August 11, 2026</i> .....      | First publication of Class II Notice of Public Hearing (1 <sup>st</sup> & 2 <sup>nd</sup> notice must occur in 2 consecutive weeks). Publication date for notices/hearings of City official newspaper. Publication of Class I Notice of Joint Review Board Meeting (Must be published at least 5 days prior to the JRB meeting.<br>(After Notice of Public Hearing is sent out) |
| <i>Tuesday, August 18, 2026</i> .....      | Second publication of Class II Notice of Public Hearing. Provide DOR with readable copies of the public hearing notices and an affidavit of publication from the newspaper indicating both dates of publication. (Must be at least 7 days prior to Public Hearing).   |
| <i>Monday, August 24, 2026</i> .....       | JRB holds its first meeting. Board’s Chairperson and public member are selected (must be within 14 days after the notice publication, before public hearing).   |
| <i>Tuesday, August 25, 2026</i> .....      | Public hearing regarding the project plan. Must be held at least one week (7 days) after second publication of public hearing notice.   |
| <i>Tuesday, August 25, 2026</i> .....      | Plan Commission adopts resolution and submits it to the City Council for approval.  |
| <i>Tuesday, September 15, 2026</i> .....   | Class I notice of JRB meeting due to newspaper.   |
| <i>Tuesday, September 15, 2026</i> .....   | City Council considers Plan Commission recommendation. Project plan approved. City Council adopts resolution. Clerk provides the JRB with a copy of the resolution and financial information.<br><br>(No sooner than 14 days after the public hearing)  |
| <i>Tuesday, September 22, 2026</i> .....   | Publication of Class I Notice of JRB meeting (must be published at least 5 days prior to the JRB meeting).  |
| <i>Tuesday, September 29, 2026</i> .....   | Final action by JRB.<br><br>(Within 45 Days after receiving Resolution)   |
| <i>Friday, October 2, 2026</i> .....       | JRB notifies the City of its decision. <i>(Within 7 Days of JRB action)</i>   |
| <i>Submitted by October 30, 2026</i> ..... | Submit written notice to DOR of TID approval. <i>(Within 60 Days of Approval)</i>   |
| <i>Submitted by October 30, 2026</i> ..... | Submit completed application to DOR for base value certification.   |



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Rebecca Houseman, City Manager

**RE:** Review and possible action relating to an Agreement for General Consulting Services with Robert W. Baird & Co. Incorporated to amend the Tax Increment District #9 project plan and boundaries (Houseman, City Manager)

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### BACKGROUND

The City Council created Tax Increment District (TID) #9 in the fall of 2022 as a mixed-use TID on the northwest side of the City to support private development and public infrastructure. Both the boundaries and the project plan associated with the TID can be amended during its life. Staff is proposing to work with Baird to amend both the boundaries and project plan of TID #9 to support the potential improvements or investment in the Koshkonong Estates Subdivision.

### DISCUSSION

City staff, the City Council, and the local property owners within the Koshkonong Estates Subdivision have been working together over the last several months to address the degraded roads, water issues, and future of the area. While no decisions relating to the future of the subdivision have been made, staff is proposing to amend TID #9 to include a portion of the subdivision as a possible funding source for future projects.

Staff is proposing to amend the TID with the assistance of Baird. The Agreement with Baird will provide City staff, the Plan Commission, the Joint Review Board, and the City Council general consulting services to facilitate the amendments, including:

- Creation of a timeline detailing the amendment process
- Assist, develop, and compile the required project plan amendment for the TID
- Provide analysis for the evaluation of project plan amendment
- Develop economic feasibility analysis of the TID
- Assist in discussions with potential developers
- Assist with public notices, agendas, and resolutions for approval bodies
- Meet with City staff to facilitate analysis of the project plan
- Attend public meetings to present TID #9 project plans

- Assist the City in compiling the necessary documents for submissions to DOR

The draft amendment schedule and general consulting services agreement are attached for City Council review. This represents the first step in the amendment process, and as one can see from the schedule, there will be multiple opportunities for input from the public, the Joint Review Board, the Plan Commission, and the City Council.

The TID #9 Current Boundaries map shows the location of TID #8 (which is closed) in light orange and TID #9 in yellow. The Koshkonong Estates Subdivision is shown on the south end of the Map. The TID #9 yellow boundaries could be extended south to include a portion of the Subdivision.

### **FINANCIAL ANALYSIS**

The fee included in the proposal from Baird is \$9,500. The fee will be paid for by TID #9.

City staff did not seek additional proposals for this work, as Baird is the City's financial advisor. City staff often seeks information, updated pro formas for all the TIDs, and other advice and counsel from Baird staff including Justin Fischer and Jennifer Engel. Baird has been an excellent partner of the City, and staff seeks to extend that relationship. Baird staff have proven themselves responsive, helpful, and trustworthy. The City pays Baird for prescribed work, such as TID creation and borrowing. However, aside from those upfront fees, the City does not pay Baird hourly or otherwise for consulting work relating to TIDs, creating and updating pro formas for possible developments, financial advice, preparation of debt updates for the City Council, and other services.

### **RECOMMENDATION**

Staff recommends that the City Council approve the General Consulting Services Agreement between the City of Fort Atkinson and Robert W. Baird & Co. for amendments to Tax Increment District #9 and authorize the City Manager to execute.

### **ATTACHMENTS**

1. General Consulting Services Agreement-TID Territory Addition Amendment TID 9
2. Revised tid 11 creation and TID 9 amendment timeline fort atkinson-draft
3. TID 9 Current Boundaries

## GENERAL CONSULTING SERVICES AGREEMENT

THIS GENERAL CONSULTING SERVICES AGREEMENT (this “Agreement”) is entered as of this \_\_\_ day of March, 2026 by and between the City of Fort Atkinson, Wisconsin (“Client”) and Robert W. Baird & Co. Incorporated (“Baird”).

### RECITALS:

WHEREAS, Client seeks to retain Baird to provide general consulting services and Baird desires to provide such services, on the terms set forth in this Agreement;

WHEREAS, Client understands and acknowledges that the services to be provided under this Agreement are regarding the territory amendment to TIF District Number 9, and does not contemplate or relate to a future issuance of municipal securities; and

WHEREAS, Client’s decision to retain Baird to provide general consulting services and Client’s execution and delivery of this Agreement have been approved by all necessary action on the part of Client.

NOW THEREFORE, the parties hereto agree as follows:

### **I. Scope of Work**

Baird shall provide the following general consulting services to Client, if and when requested by Client:

#### TIF District # 9

- Creation of a timeline detailing the amendment process
- Assist, develop, and compile the required project plan amendment for the TID.
- Provide analysis for the evaluation of project plan amendment
- Develop economic feasibility analysis of the TID evaluating current TID and forward looking TID analyses
- Meet with City staff (in person or electronically) to facilitate analysis/discussion of the TIF District Number 9 project plans.
- Attend public meetings (in person or electronically) to present the TIF District Number 9 project plans
- Assist the City in compiling the necessary documents for submissions to DOR.

### **II. Municipal Advisory or Underwriting Services**

This Agreement pertains only to general consulting services and expressly does not cover any municipal advisory, underwriting or other services that are directly related to any specific financings or offerings. Client understands that the term “municipal advisory services” means any municipal advisory or consultant services with respect to an issuance of securities, including advice with respect to the structure, timing, terms and other similar matters concerning such issuance.

If Client proposes, determines or undertakes to effect an issuance of municipal securities at any time during the term of this Agreement, Client may engage Baird as municipal advisor, underwriter, or placement agent with respect to such issuance. If Client determines to so engage Baird and Baird determines to accept such engagement, Client and Baird would enter into a separate written municipal advisory, underwriting, or placement agent engagement letter. Client understands that if Baird serves as municipal advisor in connection with an offering, Baird will not be able to bid or otherwise underwrite or serve as agent for the placement of the securities. Client also understands that if Baird acts as underwriter or placement agent on an offering, Baird may not also serve as municipal advisor on that offering but, in the course of acting as underwriter or placement agent, may render advice to Client, including advice with respect to the structure, timing, terms and other similar matters concerning the offering. Client further understands that Baird’s primary role as underwriter would be to purchase securities in an arm’s-length commercial transaction between Client and Baird and as placement agent, Baird’s primary role would be to place or facilitate or arrange for the placement of securities by the Client with purchasers in an arm’s-length transaction. Baird, as underwriter or placement agent, would have financial and other interests that differ from those of Client.

**III. Compensation and Terms of Payment**

For the general consulting services provided hereunder, Baird shall receive the following compensation:

A fee equal to \$9,500, which fee shall be payable within 10 business days upon completion of the Scope of Work as outlined above.

Baird will be responsible for paying all out-of-pocket costs and expenses it incurs that relate to the general consulting service it provides hereunder.

**IV. Information to Be Furnished to Baird**

All information, data, reports and records necessary for performing under this Agreement shall be furnished to Baird without charge by Client, and Client shall provide such cooperation as Baird may reasonably request to assist Baird in providing the services hereunder.

**V. Indemnification; Limitation of Liability**

Client agrees that neither Baird nor its employees, officers, agents or affiliates shall have any liability to Client for the Services provided hereunder except to the extent it is judicially determined that Baird engaged in gross negligence or willful misconduct. In addition, to the extent permitted by applicable law, Client shall indemnify, defend and hold Baird and its employees, officers, agents and affiliates harmless from and against any losses claims, damages and liabilities that arise from or otherwise relate to this Agreement, actions taken or omitted in connection herewith, or the transactions and other matters contemplated hereby, except to the extent such losses, claims, damages or liabilities are judicially determined to be the result of Baird’s gross negligence or willful misconduct.

**VI. Term of the Agreement**

This Agreement shall become effective on the date hereof and shall continue unless and until terminated by either party upon at least 30 days written notice to the other party.

Upon termination of this Agreement, Baird shall be entitled to just and equitable compensation for any services provided prior to such termination for which Baird has not previously received compensation.

**VII. Non-Discrimination**

Baird, as the supplier of general consulting services covered by this Agreement, will not discriminate in any way in connection with the Agreement in the employment of persons, or refuse to continue the employment of any person, on account of the race, creed, color, sex, national origin, or other protected class of such person or persons.

**VIII. Miscellaneous**

This Agreement shall be governed by and construed in accordance with the laws of the State of Wisconsin. This Agreement may not be amended or modified except by means of a written instrument executed by both parties hereto. This Agreement may not be assigned by either party without the prior written consent of the other party. This Agreement represents the entire agreement and understanding of the parties with respect to the subject matter hereof and supersedes any prior or contemporaneous agreements, arrangements, understandings, negotiations and discussions between the parties involving such subject matter. Baird is registered as a municipal advisor with the Securities Exchange Commission and Municipal Securities Rulemaking Board.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date first written above.

**Client - City of Fort Atkinson**

**Robert W. Baird & Co. Incorporated**

By: \_\_\_\_\_

By:  \_\_\_\_\_

Ms. Rebecca Houseman, City Manager

Ms. Jennifer Engel, Vice President  
cc: Mr. Justin Fischer, Managing Director

# City of Fort Atkinson

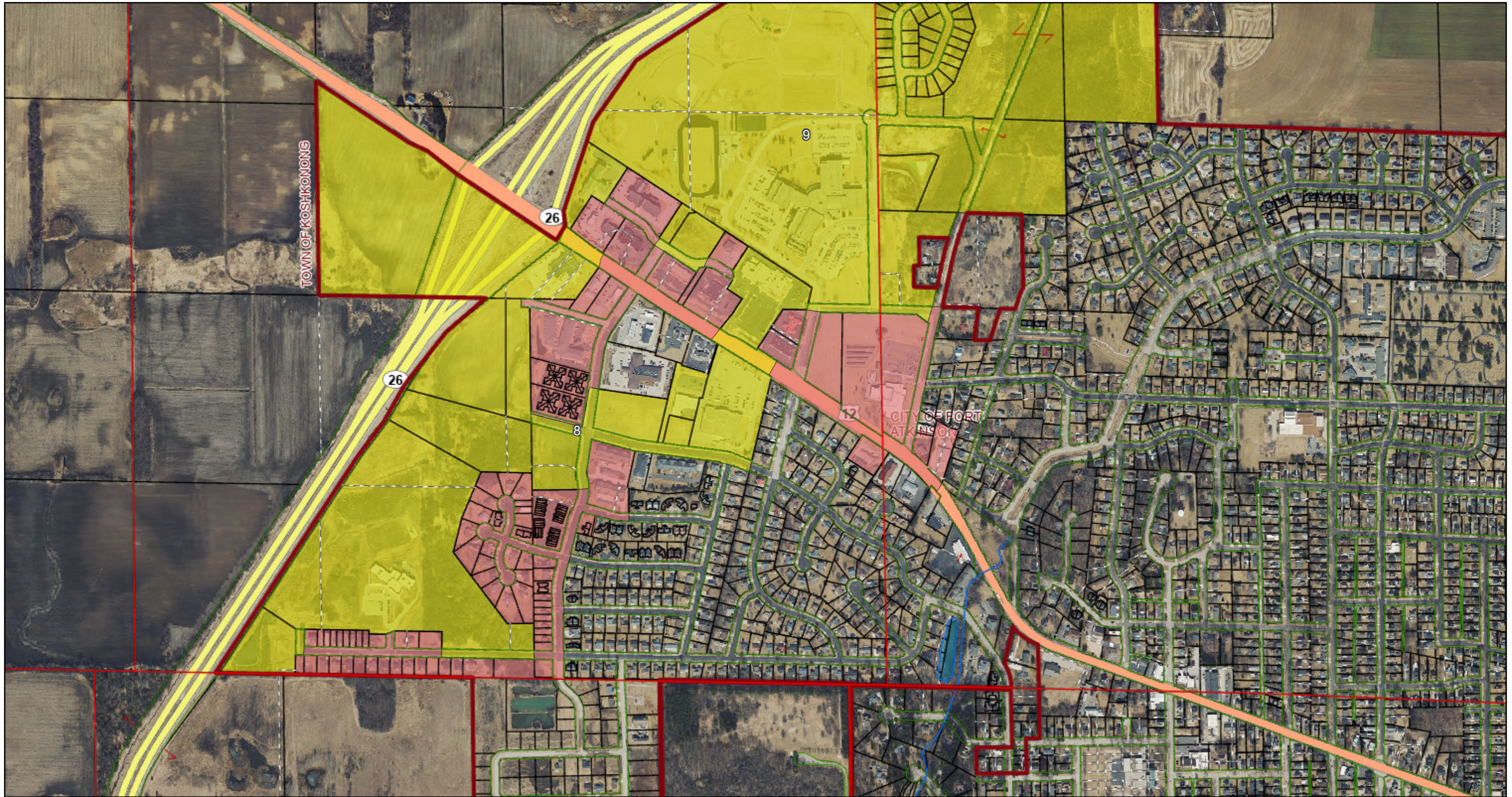
## *Timeline for TID#11 Creation and TID #9 Territory Amendment - Mixed-Use Districts*



|                                       |  |
|---------------------------------------|--|
| <i>Monday, June 29, 2026</i> .....    | Consulting service agreement executed. Direction to proceed.   |
| <i>Monday, July 6, 2026</i> .....     | Preliminary project plan template available for City staff review (maps excluded).   |
| <i>Friday, July 10, 2026</i> .....    | TID boundaries finalized.  |
| <i>Wednesday, July 22, 2026</i> ..... | Mapping complete and delivered to Baird.   |
| <i>Monday, July 27, 2026</i> .....    | Baird compiles draft project plan.   |
| <i>Friday, July 31, 2026</i> .....    | Final comments/changes to draft project plan.  |
| <i>Tuesday, August 4, 2026</i> .....  | Class 1 Notice of Joint Review Board (JRB) Meeting and Class II Notice of Public Hearing due to City official newspaper.   |
| <i>Tuesday, August 4, 2026</i> .....  | Draft version of the project plan available for public review/distribution.  |
| <i>Tuesday, August 4, 2026</i> .....  | Copy of the Notice of Public Hearing sent via First Class mail, from the City to all taxing entities (county, school, and technical college district officials).<br>Must occur at least 15 days prior to public hearing and before first publication of Class II notice.<br><br>Provide DOR with copies of the cover letters that were sent with the notices or a clerk’s certification that the letters and notices were distributed on the same date.<br><br>(After Project Plan is available & before publication date) |
| <i>Tuesday, August 11, 2026</i> ..... | First publication of Class II Notice of Public Hearing (1 <sup>st</sup> & 2 <sup>nd</sup> notice must occur in 2 consecutive weeks). Publication date for notices/hearings of City official newspaper.<br>Publication of Class I Notice of Joint Review Board Meeting (Must be published at least 5 days prior to the JRB meeting).<br><br>(After Notice of Public Hearing is sent out)  |

|  |   |
|--|---|
| <i>Tuesday, August 18, 2026.....</i>       | Second publication of Class II Notice of Public Hearing. Provide DOR with readable copies of the public hearing notices and an affidavit of publication from the newspaper indicating both dates of publication. (Must be at least 7 days prior to Public Hearing). |
| <i>Monday, August 24, 2026.....</i>        | JRB holds its first meeting. Board’s Chairperson and public member are selected (must be within 14 days after the notice publication, before public hearing).   |
| <i>Tuesday, August 25, 2026.....</i>       | Public hearing regarding the project plan/project plan amendments. Must be held at least one week (7 days) after second publication of public hearing notice.   |
| <i>Tuesday, August 25, 2026.....</i>       | Plan Commission adopts resolution and submits it to the City Council for approval.  |
| <i>Tuesday, September 15, 2026 .....</i>   | Class I notice of JRB meeting due to newspaper.   |
| <i>Tuesday, September 15, 2026.....</i>    | City Council considers Plan Commission recommendation. Project plan approved. City Council adopts resolution. Clerk provides the JRB with a copy of the resolution and financial information.<br><br>(No sooner than 14 days after the public hearing)              |
| <i>Tuesday, September 22, 2026.....</i>    | Publication of Class I Notice of JRB meeting (must be published at least 5 days prior to the JRB meeting).  |
| <i>Tuesday, September 29, 2026 .....</i>   | Final action by JRB.<br><br>(Within 45 Days after receiving Resolution)   |
| <i>Friday, October 2, 2026 .....</i>       | JRB notifies the City of its decision. <i>(Within 7 Days of JRB action)</i>   |
| <i>Submitted by October 30, 2026 .....</i> | Submit written notice to DOR of TID approval. <i>(Within 60 Days of Approval)</i>   |
| <i>Submitted by October 30, 2026.....</i>  | Submit completed application to DOR for base value certification.   |

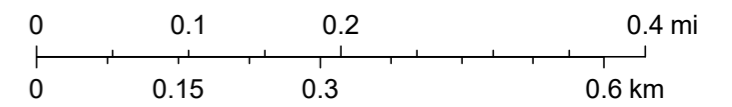
# TID 9 Current Boundaries



3/13/2026, 8:51:45 AM

1:10,903

- |                           |                                   |                        |    |
|---------------------------|-----------------------------------|------------------------|----|
| PLSS Sections             | Old Lot/Meander/Other Carto-Lines | Tax Parcel Information | 9  |
| Municipal Boundaries      | Rail Right of Ways                | <b>TID Boundaries</b>  | 10 |
| Right of Ways             | Surface Water                     | 6                      |    |
| <b>Cartographic Lines</b> | Map Hooks                         | 7                      |    |
| Property Boundary         |                                   | 8                      |    |





## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Zach Navin, Director of Public Works

**RE:** Review and possible action relating to the award of professional services related to the Lead Service Lateral Replacement Plan (Navin, Director of Public Works)

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### BACKGROUND

On July 1, 2025, the City of Fort Atkinson was mandated by the Wisconsin Department of Natural Resources (WDNR) to complete an approved Lead Service Line (LSL) Replacement Plan. A critical component of this mandate was the adoption of a formal ordinance to provide the legal authority for the full replacement of lead service lines on both public and private property.

In August 2025, the City Council adopted Ordinance 98-59, which ensures the City meets federal Lead and Copper Rule Improvements (LCRI) standards. This ordinance is vital to public health, as it aims to reduce lead contamination to zero and ensure water quality at every tap. Furthermore, the ordinance authorizes the City to apply for state and federal funding and provides a mechanism to discontinue service to property owners who fail to comply with mandatory replacement requirements.

On October 31, 2025, City staff submitted the Intent To Apply (ITA) for the Safe Drinking Water Loan Fund (SDWLF). The ITA makes the City eligible to apply for the SDWLF by June 30, 2026.

With the legal framework in place and application initiation started, the City sought proposals from qualified engineering firms to develop a comprehensive LSL Capital Plan. This plan must include funding opportunities, a replacement schedule, a detailed financing strategy, and a robust resident communication program to manage our approximately 4,818 active water services. There are 255 private side laterals needing replacement and 329 public side laterals needing replacement.

### DISCUSSION

City staff put out a request for proposals (RFP) for the Lead Service Line Replacement Plan and received six proposals, which were evaluated based on firm experience, team qualifications, project approach, funding expertise, and cost. The RFP included:

1. Establishing plan parameters
2. Developing a replacement plan
3. Developing a funding plan
4. Creating an implementation strategy
5. Creating a communication plan

City Staff interviewed the firms that provided the top two proposals shown below: Graef & City Water, and Ruckert Mielke & Jacobs Engineering. Note that the City has worked with both Graef and Ruckert Mielke in the past. Also, both firms sought out a partner organization to assist with the LSL program. Graef's proposal includes services from City Water, and R/M includes services from Jacobs Engineering.

Both firms presented strong proposals and interviewed well. Ultimately, the interview team is recommending Graef & City Water to lead the City's LSL replacement program. Their team put together a strong proposal, identifying multiple opportunities for grant and loan funding as well as a strong communication plan to ensure residents are well aware of the Lead Service Lateral Replacement program the City has initiated. The Graef/City Water proposal represents a transparent, efficient, and cost-effective program.

A primary goal of this project is to develop a financing plan that minimizes the burden on homeowners. Graef has proposed addressing this by applying for the following loan and/or grant programs:

- Safe Drinking Water Loan Program (SDWLP): Utilizing subsidized loans and principal forgiveness (grants) provided by the WDNR.
- Bipartisan Infrastructure Law (BIL): Accessing federal funds where 49% is designated principal forgiveness for eligible areas.
- Targeted Grants: Applying for specialized funds, such as the \$150,000 DNR outreach grant to support resident communication.

The table below represents the scoring of the proposals through the matrix developed by City staff.

| Firm                   | Experience (25%) | Team (20%) | Approach (20%) | Funding (20%) | Cost (15%) | Total Score (out of 10) |
|------------------------|------------------|------------|----------------|---------------|------------|-------------------------|
| GRAEF / City Water     | 4.8              | 5          | 5              | 5             | 4.7        | 9.81                    |
| Ruekert & Mielke (R/M) | 4.7              | 5          | 5              | 4.7           | 4          | 9.43                    |

|                           |     |     |     |     |     |      |
|---------------------------|-----|-----|-----|-----|-----|------|
| MSA Professional Services | 4.6 | 4.8 | 4.5 | 4.5 | 4.8 | 9.26 |
| Baxter & Woodman (B&W)    | 4.2 | 5   | 4.8 | 4.8 | 4   | 9.14 |
| Clark Dietz               | 4.3 | 4   | 4   | 4.2 | 5   | 8.53 |
| Trotter and Associates    | 4.2 | 4   | 3.5 | 4   | 4.8 | 8.14 |

**FINANCIAL ANALYSIS**

Graef's proposed fee for tasks 1-5 of the RFP are not to exceed \$88,836. As shown in the table below, this is not the least expensive proposal, but as can be seen through the scoring matrix above, it is the most comprehensive proposal. The internal review team determined that the combination of Graef's design expertise and City Water's utility management and financial modeling provides the best long-term value and fiscal protection for the City of Fort Atkinson. The administrative fees are not a budgeted CIP item for 2026; staff is proposing these fees be paid for by the Water Utility Fund. City side replacement funds have been identified in the CIP starting in 2027, and staff will work with the proposed firm to solidify funds needed on an annual basis to complete this work.

| Firms                | Hours | Total cost   | cost per hour |
|----------------------|-------|--------------|---------------|
| MSA                  | 441   | \$79,348.00  | \$ 179.93     |
| Graef                | 489   | \$88,836.00  | \$ 181.67     |
| Clark-Dietz          | 250   | \$47,535.00  | \$ 190.14     |
| Trotter & Associates | 260   | \$49,780.00  | \$ 191.46     |
| Ruekert & Meilke     | 496   | \$96,290.00  | \$ 194.13     |
| Baxter & Woodman     | 532   | \$110,000.00 | \$ 206.77     |

**RECOMMENDATION**

Staff recommends awarding the Lead Service Line Replacement Plan contract to the team of Graef and City Water LLC. to complete tasks 1-5 outlined in the proposal at a cost not to exceed \$88,836.00 and authorize the City Manager to execute the contract.

**ATTACHMENTS**

1. 2026-02-09 RFP City of Fort Atkinson Lead Service Lateral Replacement Plan (1)
2. Fort Atkinson\_Lead Service Lateral Replacement Plan - GRAEF

3. GRAEF Rates
4. RM Fort Atkinson, City of \_ Lead Service Lateral Replacement

## Request for Proposal – Lead Service Line Replacement plan

### City of Fort Atkinson, Wisconsin

#### Proposal Requested

The City of Fort Atkinson, Wisconsin is requesting proposals from qualified firms with municipal experience to develop a Lead Service Line (LSL) Capital Plan and corresponding financing and construction administration plan to meet state and federal regulatory requirements.

#### Background

The City of Fort Atkinson is a vibrant and growing community located along the Rock River, a few miles upstream from Lake Koshkonong, in Jefferson County. Fort Atkinson is the largest City located entirely in Jefferson County. According to 2023 estimates, the population of Fort Atkinson is 12,350. The City operates under the Council-Manager form of government. The City Manager is appointed by the City Council; oversees the day-to-day operations of the City; and serves as the City Council's chief advisor.

The City has approximately 4,818 active water services. Current estimates indicate that 7.5% of public services are lead or presumed lead, and approximately 1.7% of private services are lead or unknown.

#### Scope of Work

The Scope of Work shall generally mirror the following tasks, with details customized to Fort Atkinson's needs:

##### *Task 1 Establish Plan Parameters*

- Review current City ordinances and policies related to LSL replacement, including Ordinance 98-59..
  1. Establish criteria to be used for replacement schedule development, considering high-risk population prioritization, evaluation of watermain age/condition and current pavement condition ratings, among others.
  2. Identify the annual LSL replacement goal rate:
    - a. To comply with LCRI requirements.
    - b. Under current funding limits.
- In the event of a lead level exceedance.

##### *Task 2 Develop Replacement Plan*

1. Evaluate the City's current long-range capital plan; develop a replacement plan schedule that coordinates with existing identified projects.
- Develop process for managing and tracking lead service line replacement projects, including standard procedures for updating GIS records and public lead service line material dashboard.
  - Update plan annually in Quarter 1 of each year calendar year based upon changes to

federal, state, and local requirements and/or funding opportunities.

### ***Task 3 Develop Funding Plan***

1. Identify specific funding options outside of the water utility rates for both the public and private LSL replacements, including eligibility criteria, timing constraints, and documentation requirements. Determine eligibility status for all existing available grants and low-interest loan opportunities for LSL replacement. As a part of recommended funding plan, Consultant shall:
  - a. Apply, on behalf of the Utility, for grants as determined appropriate through research and program development
  - b. At a minimum, submit a SFY 2027 SDWLP application for an LSL project by June 2026.
2. Create a financing plan to implement the capital plan, identifying SDWLP-eligible project components and anticipated reimbursement milestones, while accommodating state and federal program deadlines.

### ***Task 4 Implementation Strategy***

1. Develop an implementation strategy and timeline for the LSL plan, including a calendar identifying SDWLP application, amendment, and contract dates, coordination with procurement and public bidding requirements, and alignment with annual construction schedules.
2. Identify resources necessary for plan implementation, including time, budget, and personnel, distinguishing between planning, bidding, and construction phases.
3. The implementation plan shall include monitoring and evaluation mechanisms, including tracking of SDWLP eligible costs, reimbursement status, and compliance documentation.
4. The final report shall include full replacement schedule graphics and annual schedule graphics.

### ***Task 5 Communications***

- Review City's existing lead service line communication and outreach efforts, recommending modifications or enhancements as necessary to successfully implement the LSLR Plan.
- Develop a communication strategy to incorporate public input received during plan development process and annually thereafter with plan updates, as needed.

### ***Task 6 Construction Bidding and Construction Administration***

1. Provide professional engineering and administrative services to support implementation of the approved Lead Service Line Replacement Plan through project bidding and construction, as authorized by the City. Services shall be

performed in compliance with all applicable local, state, and federal requirements, including WDNR and Safe Drinking Water Loan Program (SDWLP) procurement, contracting, and documentation standards.

2. Services may include, but are not limited to:

- Preparation of bid-ready plans, technical specifications, contract documents, and engineer's opinions of probable construction cost for lead service line replacement projects and associated water main improvements, consistent with WDNR and SDWLP requirements.
- Assistance with public bidding and procurement, including preparation and publication of bid advertisements, administration of pre-bid meetings, responses to bidder inquiries, preparation of addenda, and coordination with City staff to ensure adherence to competitive procurement requirements.
- Review and evaluation of bids for responsiveness and contractor responsibility; preparation of bid tabulations; and development of written recommendations for contract award in accordance with Wisconsin statutes, WDNR guidance, and SDWLP funding conditions.
- Construction administration services during project implementation, including review and approval of shop drawings and submittals; interpretation of plans and specifications; coordination with City staff, contractors, and regulatory agencies; and assistance with contract compliance.
- Construction observation services, as requested by the City, to document progress and conformance with contract documents, WDNR requirements, and SDWLP eligible cost criteria.
- Review and processing of contractor pay applications, change orders, and claims, ensuring eligibility and documentation compliance for state and federal funding reimbursement.
- Project closeout services, including review of final quantities and documentation, coordination of record (as-built) drawings, and updates to City GIS and asset management records as applicable.

The final goal of the water utility is to have an LSL Replacement Plan that may be submitted to the WDNR for approval, incorporating the existing long range financial plan, replacement of watermain, with an accompanying financing plan.

#### SDWLP and Regulatory Compliance

All services performed under this Request for Proposals shall comply with applicable local, state, and federal requirements, including those of the Wisconsin Department of Natural Resources (WDNR) and the Safe Drinking Water Loan Program (SDWLP). Consultants shall

perform work consistent with SDWLP planning, procurement, contracting, documentation, and reimbursement requirements. The City reserves the right to authorize planning, bidding, and construction-related services separately.

#### **Timeline for RFP**

RFP issued: February 9, 2026

Questions due: February 23, 2026 at 12:00pm

Proposals due: March 2, 2026 at 12:00pm

Interviews: March 6, 2026

Recommendation to Council: March 17, 2026

City reserves the right to adjust these dates.

#### **Proposal Content**

All proposals must follow this format and contain the information listed in this section:

1. Cover page
2. Cover letter, not to exceed 2 pages
  - a. Development Organization Overview – provide the following information about your company: Official registered name (Corporate, D.B.A., Partnership, etc.)
  - b. Company's name, address, main contact number and email.
  - c. Lead contact name, title, address (if different from the above address), direct phone and email.
  - d. Person authorized to contractually bind the organization for any proposals for the RFP.
  - e. Brief history, including the year established and number of years your development team has taken on similar projects.
3. Identify Qualifications of Assigned Personnel
  - a. The name(s) of the principal-in-charge and key technical/professional personnel to be assigned to the City together with a resume (limited to 1 page for each person) describing the experience and qualifications of each.
  - b. A team organization chart.
4. References

a. Provide names, phone numbers and email addresses for three (3) public client references who will attest to your firm's ability to undertake this type of project.

#### 5. Recent Project Examples

a. Provide at least three examples of recently completed similar projects that your firm has completed.

#### 6. Project Understanding/Approach

a. Provide a statement describing how your project team understands our project and project scope and how you will approach the project.

#### 7. Project Timeline

a. Provide a timeline of key tasks as well as your proposed final submission date to the WDNR. Describe any possible roadblocks to meet your proposed timeline.

#### 8. Fee Proposal

a. Fixed rates shall be submitted for 2026, 2027, and 2028. Thereafter, the contractor may increase billing rates annually, beginning January 1, 2029. The rate increase may not exceed the increase in the Consumer Price Index for All Urban Consumers for Midwest Size B/CI for the immediate previous December to December period. A contract amendment is not required for this billing rate adjustment.

b. Estimated hours shall be submitted for tasks 1-5.

b. Please note there will be no reimbursement for travel time, meals, or mileage; these incidental costs should be included in the hourly rates. Only document reproduction costs will be reimbursable.

#### Evaluation Criteria

The following criteria will be used by the City as a tool in selecting the best proposal. Evaluation scores do not create any right in or expectation of contract award. Proposals will be evaluated on the accuracy, references, similar experiences in the subject area, and responsiveness. Reference checks will also be considered.

##### **1. Firm Experience and Qualifications (25%)**

- a. The extent to which the firm demonstrates experience with:
- b. Lead Service Line (LSL) replacement planning and implementation for municipal water utilities;
- c. Development of capital improvement plans and replacement schedules;
- d. Similar projects completed for Wisconsin or Midwest communities of comparable size and complexity.

##### **2. Project Team and Key Personnel (20%)**

- a. The qualifications, experience, and availability of the proposed project team, including:
- b. Experience of the project manager and key technical staff;
- c. Demonstrated familiarity with WDNR and SDWLP requirements;

- d. Team organization, roles, and continuity throughout the project.

**3. Project Understanding and Approach (20%)**

- a. The degree to which the proposal demonstrates a clear understanding of the City's objectives and provides a practical, well defined approach to:
- b. Developing an LSL replacement plan and financing strategy;
- c. Integrating funding eligibility, implementation sequencing, and regulatory compliance;
- d. Coordinating planning, bidding, and construction phases in a manner consistent with SDWLP requirements.

**4. Funding and SDWLP Experience (20%)**

- a. The firm's demonstrated experience with:
- b. State and federal drinking water funding programs, including SDWLP;
- c. Preparing successful funding applications;
- d. Supporting implementation and reimbursement documentation in compliance with procurement and funding requirements.

**5. Cost Proposal and Value (15%)**

- a. The reasonableness, clarity, and competitiveness of the proposed fee structure, including:
- b. Transparency of hourly rates;
- c. Understanding of task based authorization;
- d. Overall value to the City relative to the proposed scope and approach.

**Instructions to Firms**

*Submittal Instructions*

1. Please submit one (1) digital proposal to:  
Zach Navin, Director of Public Works  
[znavin@fortatkinsonwi.gov](mailto:znavin@fortatkinsonwi.gov)  
Deadline: March 2, 2026 at 12:00pm
2. Proposals will be accepted on or before the deadline identified above. Proposals received after that date and time will be rejected. Proposals will not be opened publicly.
3. Questions shall be directed only to the contact listed above. Contact with elected officials or other staff may result in disqualification.

This RFP does not commit the City to award a contract, to pay any costs incurred in the preparation of a response to this request or to procure or contract for services or supplies. The City reserves the right to accept or reject any or all proposals received as a result of this request, to waive minor irregularities in the procedure, to negotiate with any qualified firms, or to cancel in part or in its entirety, this RFP, if it is in the best interest of the City of Fort Atkinson to do so.

Interpretations of RFP

Any requests for interpretations should be submitted in writing to Zach Navin, Director of Public Works, [znavin@fortatkinsonwi.gov](mailto:znavin@fortatkinsonwi.gov). No oral interpretations will be made to any consultant as to the meaning of the RFP requirements. All interpretations will be posted and answered on the City website by the original RFP. Developers are responsible for keeping abreast of the interpretations and amendments to the original proposal.

#### *Amendments*

Amendment of proposals may be done as follows:

**By City:** Proposals may be amended by the City in response to the need for further clarification, specifications and/or requirements changes, new opening date, etc. The amendment will be placed on the City's website with the initial RFP.

**By Firm:** Proposals may only be amended after receipt by the City by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the opening date unless requested by the City.

Proposals may be withdrawn only in total, and only by a written request to the City prior to the time and date scheduled for opening of proposals.

**Contract Term** This will be a multi-year agreement, currently anticipated to be March 2026-October 2030.

#### **RFP Review and Administration**

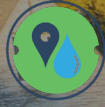
The staff member is the primary contact for contract administration of this proposal:

Primary Contact:  
Zach Navin  
Director of Public Works  
920-397-9901  
[znavin@fortatkinsonwi.gov](mailto:znavin@fortatkinsonwi.gov)

In the absence of the primary contract, the secondary contact for contract administration is:

Secondary Contact:  
Jeff Armstrong  
Water Utility Superintendent  
920-397-9916  
[jarmstrong@fortatkinsonwi.gov](mailto:jarmstrong@fortatkinsonwi.gov)

# GRAEF



# CITY WATER

# LEAD SERVICE LINE LATERAL REPLACEMENT PLAN

MARCH 2, 2026

**PREPARED FOR:**  
City of Fort Atkinson



**PREPARED BY:**  
GRAEF and City Water LLC



**PRIMARY CONTACT**

Joseph Komorowski, PE  
Project Manager  
414 / 266 9247  
[Joseph.Komorowski@graef-usa.com](mailto:Joseph.Komorowski@graef-usa.com)

**GRAEF**

275 W Wisconsin Ave  
Suite 300  
Milwaukee, WI 53203  
414 / 259 1500  
[www.graef-usa.com](http://www.graef-usa.com)

# TABLE OF CONTENTS

**Table of Contents** ..... **01**

**Cover Letter** ..... **02**

**Section 1 - QUALIFICATIONS OF ASSIGNED PERSONNEL** ..... **03**

**Section 2 - REFERENCES** ..... **13**

**Section 3 - RECENT PROJECT EXAMPLES** ..... **15**

**Section 4 - PROJECT UNDERSTANDING/APPROACH** ..... **23**

**Section 5 - PROJECT TIMELINE** ..... **32**

**Section 6 - FEE PROPOSAL** ..... **35**

March 2, 2026

Zach Navin  
Director of Public Works  
City of Fort Atkinson  
101 N. Main Street  
Fort Atkinson, WI 53538  
email: [znavin@fortatkinsonwi.gov](mailto:znavin@fortatkinsonwi.gov)

Re: Lead Service Lateral Replacement Plan Project

Dear Mr. Navin,

Our team, consisting of skilled individuals from GRAEF and City Water, is pleased to submit our proposal for the **City of Fort Atkinson's Lead Service Lateral Replacement Plan** project. It is our understanding that the City is requesting to develop a Lead Service Line (LSL) Capital Plan and corresponding financing and construction administration plan to meet state and federal regulatory requirements. As shown in the attached proposal, our team is experienced, professional, and have the capacity to be available for the City's needs throughout the project.

We recognize the importance of this initiative in replacing aging infrastructure, improving water quality, and coordinating street resurfacing to maximize long-term value for residents. As a trusted engineering partner with deep experience in water distribution systems, water operation management, regulatory compliance, lead service lateral programs, municipal design (water main and roadway), utility coordination, bidding, and construction inspection, the GRAEF and City Water team offer a proven approach to delivering complex municipal projects on schedule and within budget.

Our commitment includes:

- Integrated design and construction strategy, aligning watermain work with the City's mill and overlay program.
- Transparent cost tracking to support special assessments and fiscal accountability.
- Resident-focused outreach, including public information meetings and consistent updates during construction.

Joe Komoroski, PE, and Tom Nennig, PE, will serve as the Project Managers on the Lead Service Lateral Replacement Plan project. Together, they bring more than 50 years of experience working on municipal projects. Joe will be your primary contact, and Tom will be available as a secondary contact. James Lisak, PE, LEED AP, will be the Principal-in-Charge and person authorized to contractually bind the organization for any proposals, ensuring QA/QC needs are met. For a breakdown of our full team of professionals, please see the organizational chart and resumes within this submittal.

Thank you for the opportunity to partner with the City on this critical replacement plan program. Please reach out with any questions. We look forward to the opportunity to work together to deliver safe, reliable water service for Fort Atkinson's residents.

Sincerely,



Joseph Komoroski, PE  
Project Manager | Practice Team Leader -  
Public Works  
414 / 266 9247  
[Joseph.komoroski@graef-usa.com](mailto:Joseph.komoroski@graef-usa.com)



Thomas Nennig, PE  
Project Manager | President  
414 / 559 6883  
[Tom.Nennig@citywaterusa.com](mailto:Tom.Nennig@citywaterusa.com)



James Lisak, PE, LEED AP  
Principal-In-Charge | Practice Area Leader -  
Water  
414 / 266 9085  
[Jim.Lisak@graef-usa.com](mailto:Jim.Lisak@graef-usa.com)

# SECTION 1: QUALIFICATIONS OF ASSIGNED PERSONNEL

# We're Your Team!



Since its inception in 1961, GRAEF has grown from a small individual partnership to a prominent, multi-disciplinary international firm. GRAEF has a team of over 300 employees spread across ten offices in the Midwest, Florida, and Turks and Caicos.

For 65 years, GRAEF's unwavering dedication to excellence has been fueled by core values such as integrity, quality, and a steadfast commitment to exceptional customer service. These principles form the bedrock of GRAEF's operations, ensuring that clients receive the highest level of satisfaction and a seamless experience.

GRAEF has remained at the forefront of the industry, consistently adapting to emerging trends and embracing advancements, and is proud to be a reliable partner for clients seeking top-tier design services and unmatched expertise.

## WE ARE

- ▶ Site/Civil Engineers
- ▶ Environmental Scientists
- ▶ Surveyors
- ▶ Industrial Architects
- ▶ Mechanical, Electrical, Plumbing Engineers
- ▶ Landscape Architecture
- ▶ GIS Specialists
- ▶ Planners & Urban Designers
- ▶ Structural Engineers
- ▶ Transportation Engineers



**OUR CORE PURPOSE**

To improve the physical environment for the benefit of society in a sustainable manner

**GRAEF Headquarters**  
 275 W Wisconsin Ave  
 Suite 300  
 Milwaukee, WI 53203

(t) 414 / 259 1500  
 www.graef-usa.com



Great Lakes Water Supply Program  
 Waukesha, WI

### INFRASTRUCTURE EXPERTISE

GRAEF has extensive experience designing sanitary sewer systems and municipal infrastructure, ensuring reliable, and cost-effective solutions.

### STREAMLINED DELIVERY

Our multidisciplinary team integrates surveying, engineering, and permitting to deliver efficient, coordinated project execution from kickoff through construction.

### FUTURE-READY DESIGN

We design with long-term resilience in mind, supporting community redevelopment goals while ensuring environmental and operational sustainability.

**City Water** comprises a team of experienced water industry professionals committed to improving the management and operation of public drinking water systems. Our diverse staff possesses the expertise needed to address all aspects of water utility operations, including:

- Developing a Utility's philosophy - Understanding the big picture and operating within budgets
- Management of a Utility - Conceptual Design and long range planning
- Project Design and Construction - Understanding system hydraulics, system design and construction best practices.
- Operation and Maintenance of the system – Understanding what needs to be done day to day in order to deliver high quality, safe, reliable drinking water to our customers.

Our Milwaukee-based team brings **more than 60 years** of combined experience in both private and public roles within the drinking water industry. We are dedicated to guiding the water industry as it adapts to future demands. The City Water staff includes:

- Registered Professional Engineers
- Operation Managers
- Certified Water Operators
- Construction Manager
- Water Services Technician

City Water staff brings extensive experience in all areas of water utilities, including operations, customer service, treatment, quality, distribution, lead lines, wells, leak detection, AMR/AMI, policy, management, and finance. We not only provide engineering and reporting services, but also handle daily fieldwork and customer interactions, enabling us to meet any water utility's needs.

City Water staff currently performs Water Utility Management for the following communities:

- City of Mequon
- City of Glendale
- City of Cudahy
- Village Brown Deer
- Village of Fox Point
- North Shore Water Commission

We also perform the day-to-day field operations in:

- City of Mequon
- Village of Brown Deer
- Milwaukee Regional Medical Complex

Our goal is to help provide our clients with innovative, cost-effective solutions that are easily maintained and reliable for future generations.



#### DEVELOPING A UTILITY'S PHILOSOPHY

*Understanding the big picture*



#### UTILITY MANAGEMENT SERVICES

*Conceptual design & long-range planning*



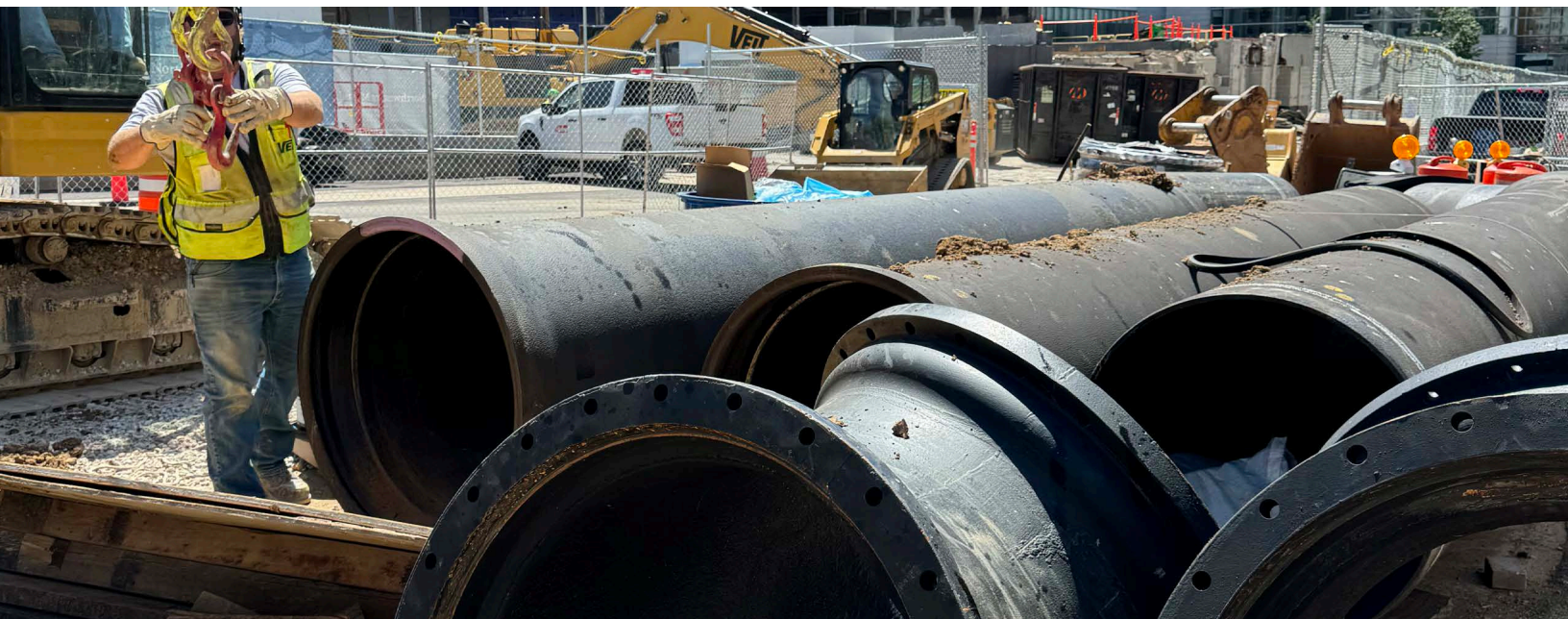
#### PROJECT DESIGN & CONSTRUCTION

*System hydraulics, system design, & construction best practices*



#### SYSTEM OPERATION & MAINTENANCE

*Day-to-day operations to maintain a safe, reliable system with satisfied customers*



## WATER MAIN DESIGN & REPLACEMENT SERVICES

GRAEF provides comprehensive engineering services for municipal water distribution systems, specializing in water main design, relay, and replacement projects. Our team has decades of experience delivering safe, reliable water infrastructure for communities across Wisconsin. From planning and permitting to construction administration, we ensure projects meet regulatory standards, minimize disruptions, and provide long-term value.

Our Expertise Includes:

### **Water Main Design & Relay**

Replacement and upsizing of aging infrastructure  
Integration with roadway reconstruction and resurfacing programs

### **Lead Service Line Coordination**

Public and private service line replacement strategies and plan design with municipalities

### **Hydraulic Analysis & Modeling**

Water distribution modeling for capacity and reliability

### **Permitting & Compliance**

WDNR applications and regulatory coordination

### **Construction Administration**

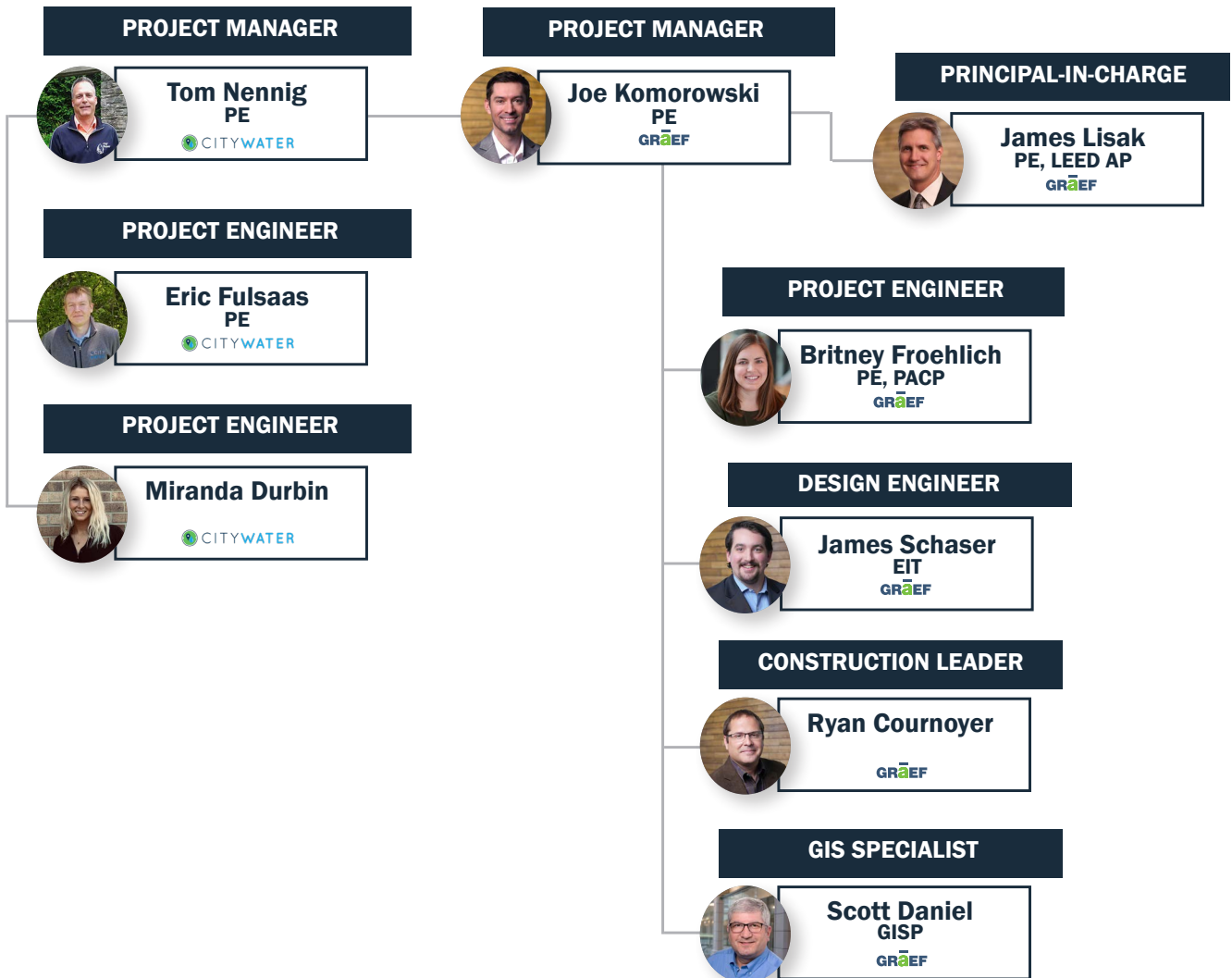
Field inspection, contractor coordination, and quality assurance

### **Utility Coordination**

Collaboration with municipalities, utilities, and stakeholders

Our experience with state regulations, utility coordination, and contractor sequencing allows GRAEF to proactively identify risks and streamline project delivery. The result is well-coordinated water main projects that stay on schedule, meet compliance requirements, and deliver dependable performance over the long term.

# PROJECT TEAM





# Joseph Komorowski PE



PRACTICE TEAM LEADER - PUBLIC WORKS

Joe has worked at GRAEF for more than 14 years. Joe has an extensive background in private site development and municipal engineering. Joe has worked with clients that range from architects to the Wisconsin Department of Transportation, to various municipalities located throughout Wisconsin. Joe provides project management; and design for sanitary sewer, water main, and storm sewer utilities; and roadway design for municipal road programs; and site/civil design, opinion of probable cost, specification development. Bidding and construction administration professional services on projects. Joe's knowledge, background, and experience allows him to encompass the needs and desires of the owner/client successfully complete any private or public project.

## PROJECT ROLE:

Project Manager

## EDUCATION

M.S., Civil Engineering, University of Wisconsin-Milwaukee, Milwaukee, WI

B.S., Civil Engineering, University of Wisconsin-Milwaukee, Milwaukee, WI

## REGISTRATION

Professional Engineer - WI

## AFFILIATIONS

American Water Association (APWA)

## OFFICE LOCATION

275 W. Wisconsin Ave., Suite 300  
Milwaukee, WI 53203

As **Project Manager**, Joe's responsibilities would include serving as the City's primary point of contact and overseeing project coordination, schedule, budget, regulatory compliance, and delivery from design through construction

## PROJECT EXPERIENCE

**Oconomowoc 2025 Roadway and Utility Project, Oconomowoc, WI – Project Manager:** Providing project management for 11 project areas, which include various roadway and utility improvements. Roadway pavement improvements include; 2-inch mill and overlay, full pavement removal and replacement., roadway reconstruction, roadway narrowing, asphalt path design, and water main relays. Project design will include coordination with the City of Oconomowoc, coordination with roadway and utility design, creating plan and profiles, specifications, and assistance during bidding.

**2024, 2025, and 2026 Roadway and Utility Project, City of Watertown, WI – Project Manager:** Providing project management for the roadway reconstruction and utility relay improvements for three separate bid packages for the City of Watertown's annual road and utility program. The overall project length is approximately 8,550 linear feet, which includes full roadway pavement and base course removal and replacement, curb and gutter replacement, 1,600 linear feet of proposed sidewalk/asphalt pathway, 8,550 linear feet of watermain relay, sanitary sewer repairs and replacements, and storm sewer mainline relay. The 2025 roadway and utility project will be completed following WisDOT standards and formatting. Project design will include coordination with the City of Watertown, topographic mapping, creating plan and profiles, specifications, and assistance during bidding.

**Private Property Infiltration & Inflow, Village of Germantown, WI - Project Engineer:** Provided project Engineering Design for a sub-division within the Village of Germantown, approximately 120 Parcels, with resident coordination, Public Information Meetings, CCTV investigation and bidding, MMSD funding agreement coordination and development, developing plans for relaying 42 dwelling lat-erals from mainline to house, and construction management coordination for house inspections and contractor communication. Project Engineering services included coordination with MMSD, Village of Ger-mantown (client), contractors, and residents. Managed project design schedule, opinion of probable cost, plans, technical specifications, bidding documents, and construction administration.



# Thomas Nennig, P.E.

## President

### EDUCATION

Marquette University  
Bachelor of Science Civil  
Engineering

### CURRENT LICENSES

Professional Engineer - WI  
WIDNR – Certified Operator

### PROFESSIONAL ORGANIZATIONS

American Water Works  
Association

### PROJECT ROLE:

Project Manager

### WATER UTILITY EXPERIENCE

Tom has over 37 years of Civil Engineering Experience. He specializes in the management, operation, and design of water distribution systems. Prior to joining City Water, Tom worked as a Client Service Manager for Bonestroo, and an engineering technician for the City of Milwaukee, and Donohue.



### LEAD SERVICE LINE PROJECT EXPERIENCE

**Port Washington, WI** – Collaborated with City staff to develop and implement a pilot program for private lead service line replacements. Secured DNR principal forgiveness money to cover the cost of replacing over 30 private lead service lines in 2022. Pilot program included developing construction standards and bidding requirements for PLSL replacement.

Collaborated with Utility staff in creating service line material identification standards and developing strategies for entering material data into the City’s GIS system.

**Shorewood, WI** –Project manager for the design and replacement of the water meter replacement project. Developed meter replacement protocols, cross-connection inspection standards and service line material identification. Data from the meter replacement project was used to develop the City’s service material database that is presented in the Village’s GIS system. Customers can access the GIS database to review service line material based on customer address.

Collaborated with Utility staff in developing Village ordinances and construction standards for service line replacement. Assisted staff in developing the Village’s funding mechanism for private lead service line replacement. Program was approved by the PSC that allows utility funds to be used to pay for up to 50% of replacement costs to homeowners.

In 2024, City water will be assisting the Village in development of the Lead Service Line Replacement program including a rate analysis to fund the future replacement of water mains and services in the Village.

**Cudahy, WI** – Teamed with CDM Smith in development of a Lead Service Replacement Program. Program includes development of the service line material inventory, optimization of the corrosion control system to help reduce the lead levels in the drinking water, and the long-term replacement of lead service lines in the City.

**Whitefish Bay, WI** – Currently working with the Village to complete the service line inventory list for DNR submittal. Material identification is determined by review of property records, permits, as-built information, employee interviews and meter change records. In 2024, City water will be developing Lead Service Line Replacement program for Village including a rate analysis to fund the future replacement of water mains and services in the Village.

**South Milwaukee, WI** – Collaborated with City staff to help secure DNR principal forgiveness money for PLSL replacement. Developed and implemented construction standards and bidding requirements for PLSL replacement.



# James Lisak PE, LEED AP



## PRACTICE AREA LEADER - WATER

Jim’s experience spans planning, design, and management for municipal infrastructure projects, with a strong focus on underground utilities. He has delivered sanitary sewer conveyance systems, pumping stations, and wastewater treatment solutions for counties and municipalities across Wisconsin. His expertise includes water distribution design, stormwater collection and conveyance, erosion control, and grading, as well as roadway and pavement design. Jim’s background ensures compliance with regulatory standards and efficient delivery of complex utility projects.

### PROJECT ROLE:

Principal-In-Charge

### EDUCATION

B.S., Civil Engineering, Purdue University, West Lafayette, IN

### REGISTRATION

Professional Engineer - WI

### CERTIFICATIONS

LEED Accredited Professional  
Construction Specifications Institute, CSI  
Construction Document Technologist, CDT

### AFFILIATIONS

American Public Works Association (APWA)  
American Society of Civil Engineers (ASCE)

### OFFICE LOCATION

275 W. Wisconsin Ave., Suite 300  
Milwaukee, WI 53203

As **Principal-in-Charge**, Jim’s responsibilities would include providing executive oversight and quality assurance, ensuring appropriate staffing, technical excellence, and adherence to schedule and budget. He would support the Project Manager and Village staff at key milestones throughout the project.

### PROJECT EXPERIENCE

**Milwaukee Water Works Annual Water Main Replacement Contracts (2021–2023), Milwaukee, WI – Principal-In-Charge:** Served as Principal-In-Charge for multiple annual contracts with Milwaukee Water Works to replace aging water mains within the City’s distribution system. Across these projects, GRAEF oversaw the administration and quality control review for the design and construction of approximately 14 miles of water main replacements. Plans were prepared in strict compliance with Milwaukee Water Works standards and technical specifications. The scope of work included topographic survey, verification of street right-of-way, detailed design for water main relay and hydrant and valve placement, installation sequencing, strategic reviews on design status, estimation of quantities, WDNR permitting application and review, project management, and administration of SBE subconsultants to meet City goals.

**North Avenue Reconstruction, Wauwatosa, WI – Senior Project Engineer:** Served as Senior Project Engineer for two consecutive three-party contracts with WisDOT and the City of Wauwatosa for the design and reconstruction of approximately 2.2 miles of North Avenue. The projects included full pavement replacement and utility upgrades, featuring installation of 17,000 feet of water main, 10,100 feet of sanitary sewer, and storm sewer improvements. Both segments incorporated Complete Streets elements, including bike lanes, and advanced stormwater management strategies such as tree cells to detain water quantity and improve water quality. Responsibilities encompassed detailed design, coordination with WisDOT and municipal stakeholders, and integration of roadway and utility improvements to meet schedule and budget requirements.

**Wauwatosa West Zone Pumping Station 5113, Wauwatosa, WI – Project Manager:** Design and construction of a secondary pumping station to support the entire West Pressure District, funded through the American Rescue Plan Act (ARPA). The project includes the construction of an approximate 2,000 square foot water booster station. Facility construction includes one level. The new first floor will be at grade and has the new pumps and motors, valves and piping, main electrical control panels and pump controls. A new standby power generator will be located in the facility. The project was reviewed and permitted by the Wisconsin Department of Natural Resources.



## Eric Fulsaa PE



### PROFESSIONAL ENGINEER

Eric has 8 years of Civil Engineering Experience working in the water utility industry. Eric has both engineering and field experience in managing and operating water systems. He is proficient in using GIS mapping systems, AutoCAD Civil 3D, hydraulic modeling software, AWWA M36 water audits, DNR and PSC approvals, PSC rate cases, and utility long range financial planning. Prior to joining City Water, Eric studied at Milwaukee School of Engineering, graduating with a BS and MS in Civil Engineering.

#### PROJECT ROLE:

Project Engineer

#### EDUCATION

B.S., Civil Engineering, Milwaukee School of Engineering, Milwaukee, WI

M.S., Civil Engineering, Milwaukee School of Engineering, Milwaukee, WI

#### REGISTRATION

Professional Engineer - WI  
WIDNR – Certified Operator

#### AFFILIATIONS

American Water Works Association

#### PROJECT EXPERIENCE

##### WATER UTILITY MANAGEMENT & ENGINEERING

**City of Cudahy, WI:** Assisted in composing an RFI for an AMI meter replacement program, as well analyzing the proposals submitted. Assisted with lead service line inventory development. Currently assisting with SDWL Project 4790-06, 4790-07, and 4790-08. These projects consist of a pilot program for Cudahy’s lead service line replacement program. Integrating the Utility water spatial data into the APX10 platform to better prioritize and plan water main and lead service line replacement projects.

**City of Glendale, WI:** Assisted with lead service line inventory development Currently assisting with SDWL Project 5626-04 to remove the remaining lead service lines in the City. Compliance, service inventory development and tracking and long term financial planning and budgeting. Integrating the Utility water spatial data into the APX10 platform to better prioritize and plan water main replacement projects.

**Village of Whitefish Bay, WI:** Assisted with planning for the Lead and Copper Rule Improvements (LCRI), including LCRI compliance, service inventory development and tracking, and long-term financial planning and budgeting.



## Miranda Durbin



### ENGINEER

Miranda has 3.5 years of Civil Engineering Experience working in the water utility industry. Miranda has both engineering and field experience in managing and operating water systems. She is proficient in using GIS mapping systems, EPANET hydraulic modeling software, and utility infrastructure assessment. Prior to joining City Water, Miranda worked as a transportation engineer and studied at Milwaukee School of Engineering, graduating with a BS in Civil Engineering specializing in water and environmental resources.

#### PROJECT ROLE:

Project Engineer

#### EDUCATION

B.S., Civil Engineering, Milwaukee School of Engineering, Milwaukee, WI

#### REGISTRATION

WIDNR – Certified Operator

#### AFFILIATIONS

American Water Works Association

#### PROJECT EXPERIENCE

##### WATER UTILITY MANAGEMENT & ENGINEERING

**City of Cudahy, WI:** Reviewed utility’s infrastructure and assisted in developing a lead service line inventory within QGIS, updating it annually through utilizing in-person verification, main ages, as built records, plumbing records, etc. Currently assisting with SDWL Project 4790-06, 4790-07, and 4790-08. These projects consist of a pilot program for Cudahy’s lead service line replacement program.

**City of Glendale, WI:** Reviewed utility’s infrastructure and assisted in developing a lead service line inventory and updating the lead service line annually. Currently assisting with SDWL Project 5626-04 to remove the remaining lead service lines in the City.

**City of Port Washington, WI:** Assisted with water treatment plant upgrades and additions inspection. Assisted in creating and updating utility’s service line inventory and public documentation.

**Village of Whitefish Bay, WI:** Assisted with planning for the Lead and Copper Rule Improvements (LCRI), including LCRI compliance, service inventory development and tracking, and long-term financial planning and budgeting.



# Britney Froehlich PE, PACP



## CIVIL ENGINEER

Britney is a licensed engineer specializing in municipal engineering and consulting, project management, and utility design. Her utility design experience includes water main, sanitary sewer design, water distribution modeling and analysis, and storm sewer modeling. Britney has a working knowledge of WaterCAD, StormCAD, FlowMaster, Microstation and AutoCAD Civil 3D. Britney’s experience and work in the municipal sector make her an invaluable part of the GRAEF team.

### PROJECT ROLE:

Project Engineer

### EDUCATION

B.S., Civil Engineering, 2011, Valparaiso University, Valparaiso, IN

### REGISTRATION

Professional Engineer – WI

### PROFESSIONAL CERTIFICATIONS

Pipeline, Manhole, and Lateral Assessment Certification (PACP)

### PROFESSIONAL AFFILIATIONS

American Public Works Association (APWA)  
Wisconsin American Water Works Association (WIAWWA)

As **Project Engineer**, Britney’s responsibilities would include supporting the design of water main and service line improvements, preparing plans and specifications, and assisting with utility coordination, permitting, and cost estimating.

### PROJECT EXPERIENCE

**Milwaukee Water Works Water Main Design and Plan Preparation for Selected 2018, 2019, 2021, 2022, 2023, 2024 & 2025 Water Main Replacement Projects, Milwaukee, WI – Project Engineer (2018, 2019) & Project Manager (2021- 2025):** Managed and designed approximately 22 miles of water main replacements across multiple urban segments; responsibilities included design, permitting, and project management.

**W. North Avenue - Mayfair Road (WIS100) to Met to Wee Lane WisDOT Road Reconstruction & Utility Relay, Wauwatosa, WI – Project Engineer:** Designed storm sewer, sanitary sewer, and water distribution improvements; developed complex utility phasing plans and WDNR permitting.

**Burleigh Booster Station, Wauwatosa, WI – Project Engineer:** Provided design services for a secondary water pumping station, including piping, pump controls, SCADA system, and PSC application.



# James Schaser PE



## CIVIL ENGINEER

James works as a civil engineer in the GRAEF municipal group. His responsibilities include sanitary sewer design, storm sewer design, water main design, and storm water modeling. James’ attitude, work ethic, and experience in the municipal sector helps to make him an important asset to the GRAEF team.

As **Design Engineer**, James’s responsibilities would include supporting the design of water main and service line improvements, preparing plans and specifications, and assisting with utility coordination, permitting, and cost estimating.

### PROJECT ROLE:

Design Engineer

### EDUCATION

B.S., Civil Engineering, University of Wisconsin-Milwaukee, Milwaukee, WI

### REGISTRATION

Professional Engineer – WI

### PROJECT EXPERIENCE

**Milwaukee Water Works-Design and Plan Preparation for Selected 2024 Water Main Replacement Projects, Milwaukee, WI – Project Engineer (2024)(2025):** Designed over 8 miles of water main relay across 57 segments; responsibilities included design, survey coordination, quantity estimation, and WDNR permitting.

**2022 Germantown Private Property Inflow and Infiltration Lateral Replacement, Germantown, WI – Design Engineer:** Design Engineer for a 42-lot MMSD PPII-funded lateral replacement project, responsible for site investigation, developing plans and specifications, adjusting design approaches, and coordinating with MMSD, residents, the Village, and the contractor to ensure full program compliance.

**MPMC West Campus Development Infrastructure Improvements (Sanitary, Storm, and Water Main Design), Wauwatosa, WI – Design Engineer:** Designed sanitary, storm, and water main improvements totaling over 4,000 LF; coordinated with MMSD and multiple agencies for utility integration.



## Ryan Cournoyer PE



### CONSTRUCTION PROJECT MANAGER

Ryan is an experienced construction engineer specializing in field monitoring and inspection of transportation and municipal projects. His background includes roads and highways, bridge and retaining wall construction, sanitary and storm sewer systems, pile driving and load testing, drilled shaft foundations, and extensive material sampling and testing. Ryan's strong communication skills enable effective coordination with WisDOT, property owners, business owners, and construction teams on complex projects.

#### PROJECT ROLE:

Construction Administration Leader

#### EDUCATION

B.S., Civil Engineering – Structural Emphasis, University of Wisconsin- Milwaukee, Milwaukee, WI

B.S., Physics, University of Wisconsin-La Crosse, La Crosse, WI

#### REGISTRATION

Professional Engineer – WI

#### PROFESSIONAL CERTIFICATIONS

WisDOT HTCP certified in: PCC TEC – I/ IA, AGGTEC-IPP, PCC Strength Tester, GRADINGTECH-1, NUCDENSITYTEC-1, and HMATEC-I

#### PROJECT EXPERIENCE

**USH 45 Reconstruction, City of Franklin, WI – Construction Engineering and Inspection – Project Manager:** Managed inspection for full reconstruction of 1 mile of USH 45; responsibilities included field monitoring, stakeholder coordination, and documentation.

**WIS 50 (75th Street) 256th Avenue to 236th Avenue, Wisconsin Department of Transportation, Village of Paddock Lake – Construction Leader:** Oversaw inspection for 1.7-mile roadway reconstruction with retaining walls, storm sewer, detention pond, and bike lanes; managed multi-stage traffic control.

**WIS 100, Lovers Lane, Rawson Avenue to College Avenue, Wisconsin Department of Transportation, City of Franklin, Milwaukee County – Construction Leader:** Inspected pavement replacement, storm sewer, grading, and signal improvements for a six-lane urban cross section; coordinated safety and drainage enhancements.



## Scott Daniel GISP



### GIS DEVELOPER/SPECIALIST

Scott is a Certified GIS Professional and GIS Developer/Specialist. Since 1999, Scott has specialized in web-based GIS application development. He is experienced in many GIS platforms and programming languages. Scott's focus is on creating custom, user-friendly, interactive, web-based GIS applications that provide access to detailed spatial data for county and municipal staff and the public. He works directly with client key personnel to design and deliver web-based data management tools for managing municipal infrastructure such as sanitary sewer, water distribution, storm sewer, urban forestry, traffic signage, etc. He also trains and mentors staff in data management and application development using Visual Studio, Web Expression, SQL Enterprise Server, ESRI ArcGIS and Autodesk Map 3D.

As **GIS Specialist**, Scott's responsibilities would include mapping and tracking lead service lines, assisting in the design of water main and service line improvements, preparing plans and specifications, and assisting with utility coordination, permitting, and cost estimating.

#### PROJECT EXPERIENCE

GIS application development and infrastructure asset management including water, sanitary, stormwater, urban forestry, poles and signs, electrical system and lighting, and road programs for municipalities throughout the state of Wisconsin including:

- City of Neenah, WI
- City of Marion, WI
- City of Chetek, WI
- City of Medford, WI
- Oconto County, WI
- Village of River Hills, WI
- Village of Turtle Lake, WI
- Village of Ellsworth, WI

#### PROJECT ROLE:

GIS Specialist

#### EDUCATION

Civil Engineering and Drafting Studies, 1988, Waukesha County Technical College, Pewaukee, WI

Architectural Engineering Studies, 1983, Milwaukee School of Engineering, Milwaukee, WI

#### PROFESSIONAL CERTIFICATIONS

Geographic Information Systems Specialist

#### PROFESSIONAL AFFILIATIONS

Wisconsin Land Information Association (WLIA)  
Illinois GIS Association (ILGISA)  
American Public Works Association (APWA)

# SECTION 2: REFERENCES

# REFERENCES

The team of professionals we have organized for this project has worked with a multitude of municipalities and government agencies throughout the State of Wisconsin, forming strong collaborative working relationships resulting in successful and cost-effective results. A few of the working relationship references we have formed over the years are listed below.



## **City of Watertown**

Andrew Beyer, PE  
Director of Public Works/City Engineer  
abeyer@watertownwi.gov  
920 / 262 4050

## **Village of Germantown**

Larry Ratacyzak  
Director of Public Works  
lratacyzak@village.germantown.wi.us  
262 / 250 4721

## **City of Wauwatosa**

Bill Wehrley, PE (Retired)  
City Engineer  
wwehrley@wauwatosa.net  
414 / 479 8929 ext. 5647

## **Milwaukee Water Works**

Karl Rohrbach, PE  
Engineer-In-Charge  
City of Milwaukee  
karl.rohrbach@milwaukee.gov  
414 / 286 8148



## **Village of Whitefish Bay**

Matthew Collins  
Director of Public Works  
M.Collins@wfbvillage.gov  
414 / 755 6520

## **Village of Shorewood**

Leeann Butshilick  
Director of Public Works  
lbutschlick@shorewoodwi.gov  
414 / 847 2650

## **City of Port Washington**

Dan Fisher  
Water Utility Superintendent  
dfisher@portwashingtonwi.gov  
262 / 284 2172

## **City of Glendale**

Charlie Imig  
Director of City Services  
c.imig@glendalewi.gov  
414 / 228 1746

# SECTION 3: RECENT PROJECT EXAMPLES

# RECENT PROJECTS



## Whitefish Bay

### Water System

- 46.9 miles of mains, 40.3 miles installed pre 1980
- 0.96 MGD average day usage
- Treated Lake Michigan water from treatment plant
- 4,866 service lines, 2,724 public lead services (55.9%) and 2,662 private lead services (54.7%)
- Population 14,954 (2020 census)

### City Water work

- Developed initial service inventory for 2024 submission
- Assisted in drafting the Village's lead service line replacement plan.
- Collaborated with Village staff in developing long-range water utility infrastructure replacement program. Program includes annual replacement of water main and LSL in the Village.
- Prepared a long-term financial model and forecast to determine budgetary spending and borrowing for capital projects.
- Collaborated with North Shore Health Department to secure \$150,000 communication grant from DNR for LSL replacement.
- Currently working on finalizing the LSL plan for DNR submission



**Contact:** Matthew Collins, Director of Public Works, Village of Whitefish Bay, M.Collins@wfbvillage.gov, (414) 755-6520

## Cudahy

### Water System

- 62 miles of mains, 40 miles installed pre-1980
- 3.1 MGD average day usage
- Treated Lake Michigan water from treatment plant
- 5,560 service lines, 1,247 public lead services (22.4%) and 1,732 private lead services (31.1%)
- Population 18,204 (2020 census)

### City Water work

- Partnered with CDM Smith on lead service line replacement program
- Developed initial service inventory for 2024 submission
- Applied for Safe Drinking Water Loan (SDWL) based on census tracts to maximize principal forgiveness (PF) to the utility. There are three SDWL loans accepted for the 2026 fiscal year and are in the loan document and closing portion.
- Integrated the water utility GIS data into the APX10 platform. APX10 provides a method to objectively score and prioritize system replacements based on economy, pipe degradation, customer impacts, and other customizable factors (lead service line density, road pavement ratings, etc).
- Currently providing interim water utility supervision and management role



## Shorewood

### Water System

- 32 miles of mains, 26.5 miles installed pre 1980
- 1.0 MGD average day usage
- Treated Lake Michigan water purchased from Milwaukee Water Works
- 3,517 service lines, 2,749 public lead services (78.2%) and 2,510 private lead services (71.4%)
- Population 13,859 (2020 census)



### City Water work

- Developed initial service inventory for 2024 submission
- Worked with Village staff to develop Ordinance 3043 and Policy 44 to begin the lead service line replacement program
- Shorewood has a utility financial assistance program which provides 50% grant and 50% loan for private side lead service replacement.
- Submitted and managed PSC docket 5440-WR-113 to increase rates to cover increased expenses associated with lead service line replacement and water main replacement. This rate case is the first in Wisconsin that will seek to recover costs for the utility financial assistance program through customer rates. The rate case is close to finalizing, with the commission open meeting to discuss issues and alternatives on 2/19/26.
- Collaborated with North Shore Health Department to secure \$150,000 communication grant from DNR for LSL replacement.

**Contact:** Leeann Butshilick, Director of Public Works, [lbutschlick@shorewoodwi.gov](mailto:lbutschlick@shorewoodwi.gov), 414.847.2650

## Port Washington

### Water System

- 60.9 miles of mains, 16.5 miles installed pre 1980
- 1.26 MGD average day usage
- Treated Lake Michigan water from treatment plant
- 4,326 service lines, 633 public lead services (14.6%) and 848 private lead services (19.6%)
- Population 12,353 (2020 census)



### City Water work

- Partnered with CDM Smith to develop the Lead Service Line Replacement Plan
- Implemented a Lead Service Line Replacement pilot project with SDWL principal forgiveness funding
- Utilized City Water's PSC accounting 10-yr financial modeling outlook to project rate increases
- Currently involved in the water treatment plant renovation project, a \$20 million SDWL project.
- Worked with city staff and PSC staff to determine the appropriate rate increase to fund the water treatment plant renovation project through a two-step conventional rate case

**Contact:** Dan Fisher, Water Utility Superintendent, [dfisher@portwashingtonwi.gov](mailto:dfisher@portwashingtonwi.gov), 262.284.2172

## Glendale

### Water System

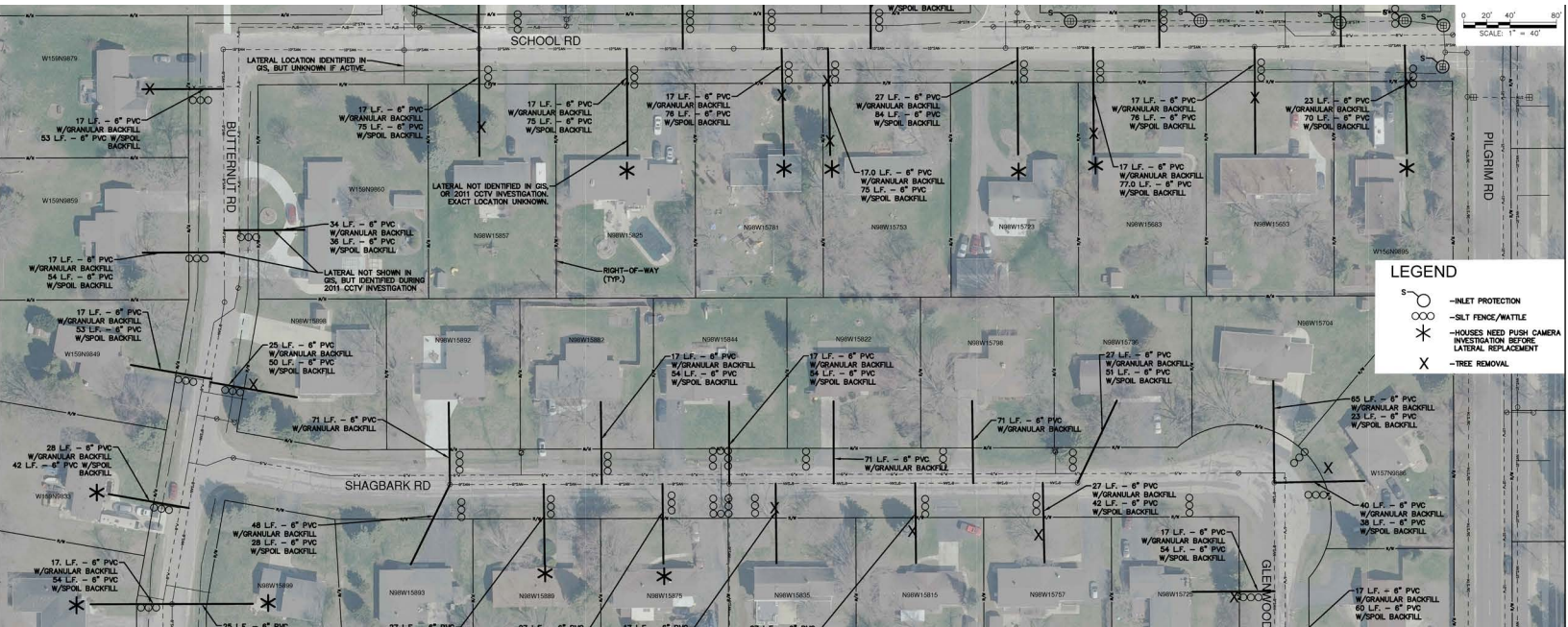
- 78.8 miles of mains, 50.9 miles installed pre 1980
- 1.5 MGD average day usage
- Treated Lake Michigan water from treatment plant
- 4,457 service lines, 41 public lead services (0.9%) and 52 private lead services (1.1%)
- Population 13,357 (2020 census)

### City Water work

- Developed initial service inventory for 2024 submission
- Applied for Safe Drinking Water Loan (SDWL) to remove remaining lead service lines in 2026. There is one SDWL loans accepted for the 2026 fiscal year and are in the loan document and closing portion. This project will remove all lead service lines from Glendale prior to 2028.
- Integrated the water utility GIS data into the APX10 platform. APX10 provides a method to objectively score and prioritize system replacements based on economy, pipe degradation, customer impacts, and other customizable factors.
- Currently providing water utility supervision and management and utility billing services.
- Completed long-term financial planning and a PSC conventional rate case in 2024. This was the first rate case for the utility since 2015.



**Contact:** Charlie Imig, Director of City Services, [c.imig@glendalewi.gov](mailto:c.imig@glendalewi.gov), 414.228.1746



# 2022 GERMANTOWN PRIVATE PROPERTY INFLOW AND INFILTRATION LATERAL REPLACEMENT

GERMANTOWN, WI

GRAEF provided residential communication, plans, specifications, and bidding documents for the Village of Germantown’s 2021 PPII program. The project required full compliance with MMSD standards, including multiple resident letters, door hangers, consent forms, and in-person meetings to ensure a smooth construction process.

Work included reviewing lateral televising to identify leaks and faults, as well as mapping existing lateral paths using GPS data. The design, bidding, and construction phases incorporated horizontal directional boring to minimize disturbance to residential properties.

Before construction, the contractor, GRAEF, and Village representatives conducted house visits to explain the process and address resident concerns. New sanitary lateral pipes were fused in basements and connected to an open pit in the roadway, where a new wye connection was installed to the sanitary main. In total, 42 homes received new laterals.

All MMSD tracking and post-construction documentation requirements were met. GRAEF inspected and reviewed all pay applications before MMSD’s final approval.

**Client Reference:**

Larry Ratacyzak  
 Director of Public Works  
 Village of Germantown  
 lratacyzak@village.germantown.wi.us  
 262/250 4721



# WATERTOWN ROADWAY AND UTILITY PROGRAM (2024, 2025, AND 2026)

WATERTOWN, WI

GRAEF prepared plans, specifications, and bidding documents for the City of Watertown’s 2024, 2025, and 2026 Roadway and Utility Program. All three projects included sanitary sewer spot repairs, existing and proposed storm sewer hydraulic analysis and capacity upsizing, relaying and upsizing water main, relaying water services, roadway reconstruction, pavement and base course removal and replacement, curb and gutter replacement, sidewalk replacement, and ADA replacement. GRAEF provided utility coordination, bid coordination, and construction administration services.

For the 2024 Roadway and Utility Project, this project was funded by the City of Watertown. GRAEF prepared plans and specifications to the City of Watertown Standards. This project involved relaying approximately 4,300 linear feet of water main and 1,410 linear feet of storm sewer mainline. 3,600 linear feet of roadway improvements and sanitary sewer mainline spot repairs. This project is currently under construction.

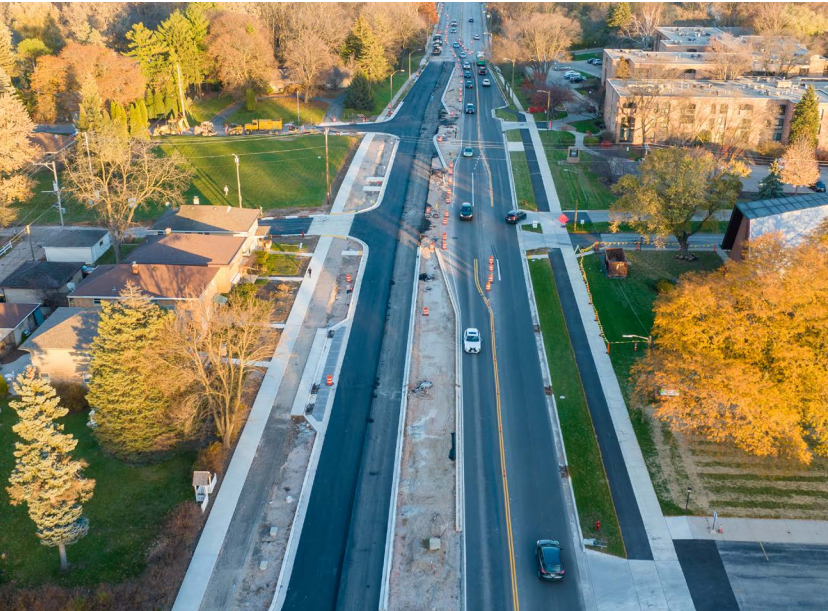
For the 2025 Roadway and Utility Project, this project was funded by the City of Watertown and the State. GRAEF prepared plans and specifications to the City of Watertown and State Standards. This project involved

relaying approximately 850 linear feet of water main and 1,100 linear feet of storm sewer mainline. 850 linear feet of roadway and sidewalk improvements. This project is currently in the final design phase and ready for bidding.

For the 2026 Roadway and Utility Project, this project was funded by the City of Watertown. This GRAEF prepared plans and specifications to the City of Watertown Standards. This project involved relaying approximately 3,550 linear feet of water main and 1,120 of storm sewer mainline. 2,020 linear feet of roadway improvements and sanitary sewer mainline spot repairs. This project included coordination with FAA and the Bureau of Aeronautics for a proposed path along 12th Street, which is adjacent to the airport. This project is in the design phase.

**Client Reference:**

Andrew Beyer, PE  
Director of Public Works/City Engineer  
City of Watertown  
920 / 262 / 4050  
abeyer@watertownwi.gov



# W. NORTH AVENUE WISDOT ROAD RECONSTRUCTION AND UTILITY RELAY PROJECT

WAUWAUTOSA, WI

## W. North Avenue (US45)- N. 116th Street to Mayfair Road (WIS100) WisDOT Road Reconstruction & Utility Relay

Due to the proposed reconstruction of the WisDOT Zoo Interchange project, that included Highway 45 at W. North Avenue, the City of Wauwatosa needed to relocate their water facilities. GRAEF was hired by the City of Wauwatosa Water Utility to design approximately 7,000LF of water main relay as part of a three-party contract with the Wisconsin Department of Transportation (WisDOT). All work was done according to WisDOT standards

## W. North Avenue- Mayfair Road (WIS100) to Met to Wee Lane WisDOT Road Reconstruction & Utility Relay

GRAEF reconstructed a segment of North Avenue and worked to relay water main within the reconstruction limits. The project segment is approximately 0.9 miles, running from Mayfair Road (STH 100) to Met to Wee Lane. This project included the design of new pavement, curb and gutter, traffic signals and street lighting facilities, pavement marking and signing upgrades, bicycle lanes, pedestrian sidewalk and curb ramp upgrades, and utility replacement for storm sewer, water main, sanitary sewer, and green infrastructure. All work was done according to WisDOT standards

## W. North Avenue- Met to Wee Lane to N. 73rd Street WisDOT Road Reconstruction & Utility Relay

GRAEF reconstructed approximately 1.6 miles of North Avenue from Met to Wee Lane to N. 73rd Street and worked to relay water main and sanitary sewer within the reconstruction limits. This project will include the design of new pavement, curb and gutter, traffic signals and street lighting facilities, pavement marking and signing upgrades, bicycle lanes, pedestrian sidewalk and curb ramp upgrades, bridge replacement above the Menomonee River and utility replacement for storm sewer, water main, sanitary sewer, and green infrastructure. All work was done according to WisDOT standards.

### Client Reference:

Bill Wehrley, PE (Retired)  
 City Engineer  
 City of Wauwatosa  
 414/479 8929 ext. 5647  
[wwehrley@wauwatosa.net](mailto:wwehrley@wauwatosa.net)



# MILWAUKEE WATER WORKS WATER MAIN DESIGN AND SURVEY

MILWAUKEE, WI

Under the City of Milwaukee Master Contract, GRAEF is performing survey, design and plan preparation for Selected Water Main Replacement Projects for Milwaukee Water Works. The City of Milwaukee Water Works (MWW) replaces approximately 20 miles of water main each year to maintain the vast water distribution system serving the community. GRAEF has been retained by the MWW engineering team to prepare water main plans for MWW to use in bidding of this work.

MWW has very detailed design standards and technical specifications for the relay of their water main, and replacement of their valves, hydrants, and service lines. GRAEF has become knowledgeable of these standards in preparation of water main designs including plan and profile sheet preparation. While many City streets are generally in a grid pattern with straightforward water main design, GRAEF has prepared relay designs on curved streets and with busy utility corridors that require more complex design solutions. Project scope of work includes topographic survey, verification of street right-of-way and existing utilities, construction plans that include the detailed design of the main line, valves, hydrants, and service lines including the review of whether a service reconnection or full replacement may be required due to existing lead service lines, installation sequencing, estimate of quantities, WDNR permitting application and review, project management and SBE subconsultant administration to meet City goals.

GRAEF has completed water main design for the following MWW Water Main Replacement Projects:

- 2018: 2.4 miles of water main, which included 11 different segments of water main replacement
- 2019: 2.2 miles of water main, which included 10 different segments of water main replacement
- 2021: 3.1 miles of water main, which included 17 different segments of water main replacement
- 2022: 2.8 miles of water main, which included 13 different segments of water main replacement
- 2023: 3.2 miles of water main, which included 25 different segments of water main replacement
- 2024: 4.6 miles of water main, which included 29 different segments of water main replacement
- 2025: 4.3 miles of water main, which included 28 different segments of water main replacement
- 2026: 2.95 miles of water main, which included 22 different segments of water main replacement

**Client Reference:**

Karl Rohrbach, PE  
 Engineer-In-Charge  
 City of Milwaukee  
 414/286 8148  
[karl.rohrbach@milwaukee.gov](mailto:karl.rohrbach@milwaukee.gov)

# SECTION 4: PROJECT UNDERSTANDING/ APPROACH

# PROJECT UNDERSTANDING/ APPROACH

## PROJECT OVERVIEW

The City of Fort Atkinson is taking an important step to protect public health and plan for the future. The Lead Service Line Replacement Plan will guide decisions that affect residents, neighborhoods, and the long-term health of the water system. The opportunity to support this effort is truly appreciated.

Selecting a consultant for a project like this is an act of trust. That trust is not taken lightly. The City deserves a team that listens, responds quickly, and follows through. The goal is simple: provide a clear, practical plan that meets WDNR and federal requirements while keeping the program affordable and manageable.

This effort is a partnership between the City of Fort Atkinson, GRAEF, and City Water. City Water brings deep experience in water distribution systems, water operation management, regulatory compliance, and lead service lateral programs. That experience supports sound replacement planning and funding strategy. GRAEF brings strong experience in municipal design, bidding, and construction inspection. That background helps turn planning into real projects that are built correctly and documented properly.

Together, the design team supports the City's water utility with both planning and design insight and construction experience. This balance helps ensure the plan is not only approved, but also buildable and financially responsible.

## PROJECT BACKGROUND

The intent of this project is not just to write a plan, but to create a working capital program that can be carried out year after year. The first focus will be on Tasks 1 through 5 of the RFP. These tasks build the foundation — reviewing ordinances, confirming the service line inventory, setting priorities, developing funding strategies, and preparing a clear replacement schedule tied to budgets and timelines. Once that action plan is complete and approved, attention will shift to Task 6 for design, bidding, construction implementation, and program monitoring until each phase of work is finished.

City Water will play a key role in leading Tasks 1 through 5. Their experience includes regulatory compliance, ordinance evaluation, priority score ranking using Area Deprivation Index data, funding strategy development, SDWLP applications, and long-range utility financial planning. This includes preparing pilot programs, coordinating funding workshops, aligning

replacement plans with capital budgets, and supporting rate modeling for multi-year forecasting. GRAEF will provide GIS inventory review as data/results become known and available. This background ensures the City receives a practical plan that will meet regulatory requirements, is financially realistic and aligned with state funding cycles. Once the action plan is created, the team will continue to manage it, adapt to changes in funding or regulations, and document improvements as the program moves forward.

During the design phase, close coordination with the City will be critical. Each year's scope will be reviewed to determine what improvements extend beyond lead service laterals, such as water main relays or pavement restoration. Construction impacts residents, even when necessary. Access to homes, driveways, emergency services, deliveries, and daily routines will be affected. When work crosses the right-of-way line onto private property, the impact becomes personal. Entering a home to complete a private side replacement can feel intimidating to residents. For that reason, coordination and outreach will be handled with care. Clear communication, respectful scheduling, and consistent follow-through will be key to building trust and allowing the work to proceed smoothly.

This program is expected to extend over multiple years. A strong capital replacement plan and steady budget framework will keep the program on track. At the same time, flexibility will be needed to respond to funding availability, regulatory updates, and lessons learned from each construction season. A successful start will set the tone for future infrastructure work in other areas of the City. Staying focused on the critical path for design, bidding, and construction each year will help deliver results the community can see and build confidence for future projects.

## DESIGN APPROACH PLANNING PHASE (TASK 1 THROUGH 5)

### ESTABLISH PLAN PARAMETERS (TASK 1)

**Service Line Inventory / GIS Review:** Our team will assess water service line material records in GIS and with the DNR to ensure accurate data and storage. This review will highlight areas for better record keeping and determine if field investigations are necessary. We will align GIS documentation with NR809 requirements for lead and copper. Using the GIS database simplifies tracking and updates, and our goal is for it to serve as the official reporting tool to the DNR.

# PROJECT UNDERSTANDING/APPROACH *CONTINUED*

**Ordinance Review and Update:** The City has drafted a strong LSLR ordinance, but some sections need clarification. Making the ordinance clear will help customers understand their replacement options, funding, and timelines. The ordinance aims to gain customer support and sustain the replacement rates required by proposed NR809 rule changes. Our team has identified several preliminary items to address in future revisions:

- Customer initiated private side LSL replacement. The City will be required to replace the public side LSL when a customer replaces the private side.
- Private side funding options available to customers
- Partial LSL replacement is not allowed.
- Potential opt-out parameters consistent with NR809 changes.

**Priority Score Ranking:** Our team will collaborate with City and Utility staff to develop a priority score ranking for lead service line replacement. Prioritization would follow a two-tier approach to meet goals of protecting public health and meeting regulatory requirements.

- Tier 1: criteria are determined by assessing customer vulnerability to lead exposure, utilizing socioeconomic factors included in the Area Deprivation Index (ADI) as well as standards employed by the WDNR for funding allocation. Preliminary analysis of Fort Atkinson Census tracts identifies two tracts eligible for principal forgiveness. It is essential to accurately identify any lead service lines (LSLs), whether public or private, within these areas as part of the LSL funding application due in June 2026. Evaluation for Tier 1 will be conducted at the census block or neighborhood level, as defined by the U.S. Census Bureau, encompassing populations ranging from several hundred to a few thousand individuals. While Tier 1 considers broad geographic regions, Tier 2 will provide additional prioritization through further refinement.
- Tier 2: criteria are established by assessing utility factors, including planned capital improvement projects and the density of lead service lines (LSLs) within each street segment. Within the area reviewed in Tier 1, replacements are further prioritized at the street level, focusing on segments with a high concentration of LSLs, frequent watermain breaks, and customers with low water usage. Additionally, information provided by the local Health Department may be utilized to identify locations with high-risk populations, such as children under six years of age or those with elevated blood lead levels (BLL).

We recommend adopting a weighting system consistent with other communities, where the ADI score makes up 70% of the prioritization. The remaining 30% is based on LSL density,

children's blood lead levels (BLL), and the age of children in the household. These combined scores will then determine the priority rankings for replacements, from highest to lowest.

**Annual LSL Replacement Goal:** Based on collected data, we will collaborate with City and Utility staff to recommend an annual LSL replacement goal. Key factors include the number of high-risk customers, funding options, and borrowing constraints identified by the City's financial team.

We recommend implementing the proposed LSL project identified in Task 3 as a pilot program for Fort Atkinson. This initiative will provide Fort Atkinson with an opportunity to evaluate every aspect of the replacement process, including customer coordination and execution of replacement and follow-up procedures outlined in subsequent tasks. A successful pilot will facilitate a seamless transition and enable an increased rate of replacements in future years.

## DEVELOP REPLACEMENT PLAN (TASK 2)

**LSL Replacement Plan:** Based on the data collected in task 1, an estimate of the total cost for the Lead Service Line Replacement Plan (LSLRP) will be developed, encompassing public outreach, program administration, construction activities, and post-construction follow-up. Cost calculations for each service line replacement will include a contingency allowance to enhance accuracy. The plan will feature comprehensive sections as outlined below:

- Background: Regulatory compliance, including adherence to the revised NR809 rule and promulgation.
- Service Line Material Inventory: Inventory creation, summary, and verification procedures.
- LSLR Prioritization: Criteria for prioritization, weighted results, details of the proposed pilot program, and strategies for program expansion.
- LSLR Costs, Funding Opportunities and Strategy: Review of Federal and State funding sources, municipal and utility financing alternatives.
- Communication and Community Outreach: LSLRP public engagement and educational initiatives, project-specific communications before, during, and after construction.
- Construction and Implementation: Description of construction methods, materials selection, and restoration protocols.

**Tracking LSL Replacement Plans:** Documentation of the work performed during an LSLR program is critical for ensuring compliance with federal regulations, updating records, and tracking program progress. As part of the project team's collaboration with City and Utility staff we will develop a simple approach to update GIS records as LSL are replaced that will automatically update the City's lead service line dashboard.

# PROJECT UNDERSTANDING/APPROACH *CONTINUED*

**Annual Review of Replacement Plan:** We will conduct a yearly evaluation and update of the LSL plan to ensure ongoing compliance with regulatory requirements, and to modify the plan in response to federal and state funding opportunities.

## **DEVELOP FUNDING PLAN (TASK 3)**

**Funding Options:** Our design team will investigate potential funding sources for public and private side LSL replacements. Potential funding options include:

**WIIN:** The federal Water Infrastructure Improvements for the Nation (WIIN) funding includes grant funding for reducing lead in drinking water, specifically in disadvantaged communities. We will monitor this program for future funding rounds. Both rounds distributed to date have had limited funding and focused particularly on communities with a history of lead exceedances and disadvantaged communities.

**CDBG:** Community Development Block Grants (CDBG) are administered through the U.S. Department of Housing and Urban Development (HUD). These grants are federally funded and distributed on a national level to municipalities and organizations for a wide range of services. This source is challenging to use for LSLR, however, because each household needs to be individually income-qualified.

**WIFIA:** WIFIA is administered by EPA and provides loans to large water infrastructure projects costing over \$20 million (or projects with eligible costs over \$5 million for communities with populations lower than 25,000) that meet its objectives. Small systems qualify for 80% of the total eligible project costs. The WIFIA load is tied to the Treasury Bond Rate that is typically higher than DNR's SDWLP.

**BIL:** The Bipartisan Infrastructure Law has allocated \$15 billion over five years for lead service line replacements. These funds will be distributed through the Drinking Water State Revolving Funds (DWSRF), with 49% designated as principal forgiveness (PF). Certain areas within the City of Fort Atkinson are eligible for PF. To date, this remains the primary funding option for lead service line replacement in Wisconsin.

**SDWLP:** The Wisconsin Department of Natural Resources (WI DNR) offers a Safe Drinking Water Loan Program (SDWLP) with funding applicable to LSLR. This program offers subsidized loans and further subsidies to reduce the cost of those loans for the design, planning, and construction costs for projects including updating drinking water distribution. The demand is very high for SDWLP loans.

Many of the grants and loans listed are competitive and cannot be guaranteed to be available to Fort Atkinson. Even with these outside funding sources, Fort Atkinson will likely still need to find a way to pay for most of this program. These options include water rate increases, special assessments, fees associated with special service areas, and other revenue sources.

Our project team will hold a funding workshop with City and Utility financial advisors to review all the funding options available for LSL replacements including using water utility rates to fund public infrastructure replacement. Based on the results of the workshop, our project team will apply on behalf of the Utility for any grants or loan programs available to Fort Atkinson.

**Pilot Program:** As previously outlined in our strategy, we plan to submit a pilot replacement project for SFY 2027 under the SDWLP program, with an application deadline set for the end of June 2026. This pilot will focus on replacing a limited number of public and private side LSLs, prioritizing census tracts that qualify for partial principal forgiveness. Our aim is to secure as much PF funding as possible for customers during this period and use this pilot as a foundation for launching a broader replacement initiative in the future.

**Financing Plan:** The LSLR plan will outline both the replacement timeline and the projected program costs. These details will be included in a long-term planning document that also covers other capital projects identified by the Utility. We will integrate both documents to form an overall financing strategy required for the utility. In collaboration with the City and utility financial advisors, we will create a comprehensive long-range financing plan for Fort Atkinson that will serve as a road map to help forecast future water rate increases for the community.

City Water, in partnership with the Public Service Commission Staff, is developing an advanced rate-setting model that will exceed the current one-year forecasting method. This improved framework is designed to assist utilities with mandatory infrastructure replacement plans by enabling them to establish multi-year water rates. The objective is to support the financial stability of each utility while enhancing long-term financial planning for both the utility and its customers.

## **IMPLEMENTATION STRATEGY (TASK 4)**

**LSL plan strategy and timeline:** For a project to succeed, the implementation plan should detail both the funding necessary and a realistic schedule that reflects regulatory requirements

# PROJECT UNDERSTANDING/ APPROACH CONTINUED

and available loan programs. The chart below outlines the annual SDWLP timeline. Many communities use the SDWLP as a tool to help fund drinking water projects. This schedule will be used to drive project work including the application, design, bidding, loan closing and construction schedule. The schedule will be incorporated into the City’s budget process each year to fulfill the objectives of the long-range planning document.

## COMMUNICATIONS (TASK 5)

Although communication is covered in Task 5, this will be the first item we will address as soon as our design team has been awarded the project. We will assist Fort Atkinson in applying for LSL replacement outreach funding. The DNR is in the second funding cycle offering up to \$150,000 for a two-year grant that supports municipal community public water systems carrying

SDWLP Timeline

|                             | OCT  | NOV | DEC | JAN | FEB                       | MAR | APR | MAY | JUN               | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |  |
|-----------------------------|--|-----|-----|-----|---------------------------|-----|-----|-----|-------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|
| SDWLP / LSL Projects        | State Fiscal Year (FY)   |     |     |     |                           |     |     |     |                   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             | ITA Due  |     |     |     | DNR publish project lists |     |     |     | SDWL App Due (PF) |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             |  |     |     |     |                           |     |     |     |                   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             |  |     |     |     |                           |     |     |     |                   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
| Municipality/ Utility Tasks | Preliminary Engineering & Design - Cost Estimates - Regulatory Approvals (DNR-PSC)<br>PSC rate case approval (submit in Jun) |     |     |     |                           |     |     |     |                   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             |  |     |     |     |                           |     |     |     |                   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             |  |     |     |     |                           |     |     |     |                   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             |  |     |     |     |                           |     |     |     |                   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |

Plan Monitoring: Implementing a pilot program provides the City with an opportunity to develop and assess key parameters that contribute to successful program execution. Critical components of the SDWLP, such as annual funding, loan interest rates, eligible reimbursable expenses, and repayment terms, will be systematically monitored. Our team will collaborate with stakeholders to review lessons learned from the pilot, identifying opportunities for modification and improvement to facilitate future program scalability and expand LSL replacements. Key items include:

- Schedule
- Design
- Bidding
- Customer communication
- Construction & restoration
- Project close out as-built recording
- Updates to LSL inventory
- Regulatory compliance

As other program components are further developed and implemented, ongoing enhancement of the outreach plan should ensure tailored messaging for distinct customer segments. The utility must also be equipped with effective communications and outreach strategies to address funding-related matters, such as possible rate adjustments, as well as compliance considerations, including fifth-liter sampling and an increased replacement rate as the pilot program expands. A comprehensive final report will be prepared outlining the results of the pilot program and providing recommendations for transitioning to an annual replacement initiative.

out lead service line replacements. The purpose of the project must be to conduct community outreach to residents served by the municipal community public water system in support of an ongoing or upcoming LSL replacement project. Outreach activities can include:

- Educating community members who will be impacted by the LSL replacement
- Promoting cooperation from customers who may have private LSLs eligible for replacement
- Informing customers of public health information about LSLs and actions to protect health before, during or after the LSL replacement

**Outreach grant applications are due by April 30, 2026.** This is a top priority for our project team. Our design team has previously helped three communities each secure \$150,000 in outreach funding. Each community has worked with the local health department in filing and helping to run the outreach program.

One of the greatest challenges of a successful LSLR program is encouraging public participation in the program and getting buy-in from customers. It is key to build public trust, convey critical information, and share program details with transparency and accuracy. There are 3 key stages in any LSLR program.

- Stage 1 – Pre-LSLR to raise awareness and encourage participation. Public outreach should begin at least one year from the beginning of any LSLR. Outreach aims to encourage participation and education the customers on specific items that will affect them during the replacement work.

# PROJECT UNDERSTANDING/APPROACH CONTINUED

- Stage 2- During Replacement to help with coordination, scheduling, expectations. Identifying why a home was selected, what permitting is required, right of entry agreements, potential financial assistance, when the work is scheduled, customer disturbances, and when customers can get help to understand the process.
- Stage 3 – Post Replacement communication to maintain water quality. Why flushing is important, when and how to complete flushes. Use of filter pitchers, post construction sampling and how to provide feedback regarding their experience with the LSLR program.

The design team will work together with the stakeholders to create outreach materials and determine appropriate outreach strategies for each stage. Materials and communication should start one year in advance of construction work to allow customers time to understand and comment on the requirements of the program. Establishing a comprehensive central database containing customer contact information—including names, phone numbers, email addresses, and landlord details—is essential for enabling staff to reach clients through multiple communication channels.

Other forms of outreach such as mass communication using utility bills, City newsletters, door hangers, local events (block party, farmers market), community centers, social media and local news outlets will be used to inform customers about the program. From there questions for more details can be directed to a website, or general email addresses and city hall or open house style events.

The design team will partner with stakeholders to formulate a comprehensive communication strategy involving both key City and Utility personnel, alongside members of our design team. We will assess existing project communications and produce new materials addressing all three phases, to ensure the clear and effective dissemination of critical information to the community.

## **Design Approach Design and Construction Phase (Task 6)**

The design approach for the City of Fort Atkinson will follow a clear structure that moves from planning to implementation in a steady and logical way. The early phase of work will focus on the Lead Service Line Capital Plan, funding strategy, budget development, and timeline. Once that foundation is approved, the focus will shift to design, bidding, and construction support under Task 6. Each step will build on the previous one so the program remains organized, fundable, and ready for construction.

The first priority under Task 6 will be a pilot program intended for 2027 construction. The goal of the pilot is to select a defined group of laterals and secure funding through the June 2026 Lead Service Line Replacement application cycle. Design plans and specifications will be prepared so they are ready for bidding following funding approval in late 2026, early 2027. The pilot project will be bid and constructed in 2027. This approach allows the City to test the process, confirm costs, evaluate resident coordination, and refine documentation procedures before expanding the program. Following the pilot, future phases beginning in 2028 and beyond will focus on specific locations, project limits, and any added infrastructure such as water main relays or roadway improvements, if desired by the City. Design, for each year, will follow the grant cycle, and design will not proceed to final completion until funding notice of award is received.

The design process will begin with a project kickoff meeting with the City and key stakeholders to review the proposed NR 809 changes, confirm goals, milestones, assessment requirements, deliverables, and critical concerns. This meeting will set the foundation for all future decisions and ensure alignment from the start.

After kickoff, design data collection will begin. This may include topographic mapping, soil borings, and GIS data retrieval based on the project scope. In areas that do not require full survey mapping, GIS aerials, contours, right-of-way lines, and address data will be used to prepare plans. Lead line replacement projects will often rely on GIS imagery, but all conditions will be verified through field visits. Site observations will confirm utilities, surface conditions, access points, and restoration limits so that construction intent is clear and costs are accurate. Each project will be treated independently so that the level of effort matches the actual scope.

Our goal is to mitigate the unknowns and stress of the residents. The City has established a great source of information on their website that we can build from in alignment with proactive communication requirements for the Lead Service Line Replacement Project information. Outreach will likely begin with introductory mailers to explain the project, its importance, regulatory requirements related to lead service lines, and direct residents to the City's website about the Lead Service Program information. Door-to-door visits with door hangers will follow to allow face-to-face communication, answer questions, and build trust.

In our experience, the face-to-face communication is one of the best ways to help residents feel more comfortable about

# PROJECT UNDERSTANDING/APPROACH *CONTINUED*

the project. Residents like to see a face they can talk to and know they are worth meeting with and not just a number for this project getting a letter through the mail. Additional engagement tools may include neighborhood meetings, like a “block party” that helps residents that are not available during the day to engage with us during the workday. QR codes that direct residents to City webpages that contain contact lists, communication preference surveys, and frequently asked questions is another engagement tool that can be discussed. Throughout design, residents will have access to project contacts for questions and concerns. Everyone is a little different in their communication style, and those residents that are fine with a phone call/conversation, we will help adjust to their comfort for communication.

Coordination will also address how situations will be handled if the residents do not want to sign the consent form and desires to opt-out of having their private water service replaced laterally, if that is a possible option. Other critical questions the resident will be likely looking to better understand, include but not limited to:

- What the overall project is and why it is so important.
- What the project schedule and timeline looks like
- How construction will impact their property and dwelling for the lateral relay beyond the ROW line.
- What the estimated assessment costs will be and how the assessment process will work, if the City desires to proceed with assessments.
- What potential construction methods such as open cut or trenchless installation.
- What the resident will be responsible for prior to construction.
- What yard and basement restoration will look like and who will be responsible for restoration.
- What the resident can expect during construction for the overall project and prior to their lateral being relaid.
- What they will need to do for the at the Pre-construction conference with the resident, contractor, City, and inspectors.
- And what they can expect after construction is complete.

A Public Information Meeting will be supported by the design team to further explain the project and expectations. Resident engagement and consent tracking will be organized and transparent. Compiled data will be tracked in a shared GIS, or spreadsheet database that documents contact attempts, consent status, and key notes. Consent forms will be stored electronically and shared with the City for records. Simplified exhibits will be prepared to summarize coordination progress.

As design advances, progress meetings will be held monthly, or as desired by the City, with the City to review status, action items, and open issues. Plans, specifications, and an Engineer’s Opinion of Probable Cost will be submitted at 60% and 90% milestones. Review meetings will occur at each stage to confirm scope, construction methods, traffic control, staging areas, and restoration limits. Following final design approval, attention will shift to permitting, bidding, and construction administration.

## **Construction Estimates (Engineer’s Estimate)**

The Engineer’s Opinion of Probable Cost will be based on past project experience, recent bid results for the City, and current contractor input to reflect real market conditions. Estimates will be prepared at the 60%, 90%, and 100% design stages as more detailed information becomes available. Costs will be broken into unit quantities suitable for bidding.

## **Bidding**

Bidding services will include preparation and management of bid documents, advertisements, addenda, and contractor inquiries. The bidding process will be administered through QuestCDN, which provides efficient document distribution, addendum tracking, and bid tabulation. We will utilize QuestCDN for online bidding. Quest has been a very successful way for us to manage the bidding process. Contractors appreciate QuestCDN, since it gives them the ability to update their unit bid costs all the way up to bid opening and they do not lose time by having to prepare hard copies that need to be submitted. Following bid opening, results will be reviewed with the City, and a recommendation memorandum will be prepared for Board consideration.

## **Construction**

Following bid award, we will start coordination with the City and contractor on putting together a complete “For Construction” package with CAD files and PDFs and distribute.

A pre-construction meeting will be conducted to review phasing, sequencing, communication protocols, and resident coordination procedures. During construction, shop drawings will be reviewed and approved. We will manage coordination between the City, contractor, Key stakeholders, inspectors, and residents. We will respond to contractors questions.

Weekly construction meetings are anticipated to help ensure we stay in front of construction, since it can be very dynamic due to weather and potential unknowns. Weekly updates will be provided to help residents understand the construction progress and scope of work completed vs remaining.

# PROJECT UNDERSTANDING/ APPROACH CONTINUED

One of the most critical items during construction will be the Pre-Construction Conference between the resident, City, Contractor, and inspectors. Prior to the contractor relaying the private water service lateral beyond the ROW, is when we will have a Pre-Construction Conference with the necessary parties to go over the construction process, make sure the consent form is signed, review and document existing conditions prior to inspection, address how long construction is estimated to take, what will be required of the resident (i.e. not being able to have water), readdress what restoration the contractor will be responsible for vs the resident, and anticipated construction dates and access to the water meter.

Quantities will be tracked for payment and assessment purposes (if needed). Lastly, we will prepare a punch list, record drawings, final quantities, and review and coordinate pay applications and change orders that are submitted. Upon completion, a project debrief will be held to identify lessons learned and adjustments for future phases. Each project will close with GIS updates and funding documentation. This steady cycle of planning, design, outreach, construction, and review will help the City deliver a successful long-term Lead Service Line Replacement Program.

## Meetings

Meetings desired by the City can be coordinated during the planning, design and construction phases. Meetings anticipated as part of the project include, but not limited to:

### Task 1 through 5:

- Overall Project Kickoff Meeting (In Person)
- Bi-weekly Meetings during Planning Phase (Virtual 9 total)
- Funding Workshop Meeting (In Person)
- Monthly Meetings during Planning Phase (Virtual 8 total)

### Task 6:

- Resident Outreach Plan meeting(s)
- Design Progress Meeting(s)
- 60% submittal review meeting(s)
- 90% submittal review meeting(s)
- Public Information meeting(s)
- Public engagement meeting(s) “Block Party”
- Public Works Committee meeting(s)
- Bid opening(s)
- Pre-Construction meeting(s)
- Pre-construction conference meeting(s)
- Weekly Construction meeting(s)
- Project Closeout/Debrief Meeting(s)

## Schedule

We have prepared a tentative project Lead Service Line Planning and Replacement schedule based on the Pilot Program initiative and through the planning process Task 1 through 5. This project schedule will be updated during the design process following each fiscal year and future project schedule. See the attached schedule on page 33 of this proposal.

## WHY GRAEF AND CITY WATER

Being selected by the City of Fort Atkinson for a project like this would continue to grow the working relationship that has already been established with GRAEF and brings the opportunity to extend resources and expertise with City Water. It would also strengthen GRAEF’s and City Water’s mission to provide professional services that are reliable, responsive, and focused on the City’s needs. The goal is to build long-term trust by delivering steady results and clear communication at every step.

We appreciate the opportunity to be considered for this project. Continued collaboration strengthens trust and reinforces a shared commitment to quality, communication, and community care. Project success will be achieved by keeping the process clear, staying flexible, and maintaining open communication with the City and its residents. The City’s priorities will remain the focus throughout the project. This is a meaningful opportunity, and GRAEF and City Water are well positioned to help deliver a successful outcome.

# PROJECT ASSUMPTIONS AND EXCLUSIONS

The following assumptions and exclusions have been made in developing this proposal. If any of these assumptions prove to be incorrect, please let us know for proper coordination with the City of Fort Atkinson to adjust the project scope, schedule, or budget as necessary:

## 1. It is assumed the City will provide the following:

- a. Access to site(s).
- b. GIS Data for utilities, Aerials, contours, and other additional data in GIS
- c. Existing storm sewer, sanitary sewer, and water main record drawings.
- d. City ordinances, codes, standards, and design details.
- e. Previous water main plans and project manuals, and bid tab results.
- f. Front End, Division 01, and City standards in PDF and Word Document Format.
- g. All available public outreach documents already established that can be utilized for this project.
- h. Geotechnical borings, if City determines borings are needed.

## 2. Schedule

- a. Schedule is based on receipt of requested data within two weeks of Notice to Proceed.

## 3. Meetings

- a. Workshops/Meetings with WDNR are assumed to be virtual.
- b. Bi-weekly Meetings with City during planning Phase are assumed to be virtual.
- c. Monthly Meetings with City during planning Phase are assumed to be virtual.

## 4. Planning Phase

- a. Field work for LSL inventory is not part of this Project and will be completed by the Water Utility or separate contract.
- b. City will manage lead service lateral replacement website and GIS updates on City system.

## 5. Pilot Program

- a. Design, bidding, and Construction inspection and administration is part of task 6. Final level of effort is based on coordination with City for Pilot Program scope.

# SECTION 5: PROJECT TIMELINE

# PROJECT TIMELINE

Our Team has developed the following project schedule to reflect the priorities and timeline outlined in the **Fort Atkinson's Lead Service Lateral Replacement Plan** Request for Proposal. This schedule is designed to ensure timely completion of all tasks while maintaining quality and coordination throughout the project.

| Tasks   | 2026 Tasks |     |     |     |     |     |     |     |     |     |     |     | 2027 Tasks |     |     |     |     |     |     |     |     |     |     |     | 2028 Tasks |     |     |     |     |     |     |     |     |     |     |     |
|---|------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
|   | Jan        | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan        | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan        | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Consultant Selection and Contracts                                |            |     | ■   | ■   | ■   |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| Develop Stakeholder Group   |            |     |     | ■   | ■   |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| Submit DNR Communication Grant Application (due 4/30/2026)        |            |     |     | ■   | ■   |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| Submit SFY 2027 SDWL Application (due 6/30/2026)                  |            |     |     |     | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■   |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| Task 1 - Establish Plan Parameters                                |            |     |     |     | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■   |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| Task 2 - Develop Replacement Plan                                 |            |     |     |     |     | ■   | ■   | ■   | ■   | ■   | ■   | ■   |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| Task 3 - Develop Funding Plan                                     |            |     |     |     |     |     | ■   | ■   | ■   | ■   | ■   | ■   |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| Task 5 - Communications   |            |     |     |     |     |     |     | ■   | ■   | ■   | ■   | ■   |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| Task 6 - Construction Bidding and Construction Administration     |            |     |     |     |     |     |     |     |     |     |     |     | ■          | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■          | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■   | ■   |
| Future SDWL Program Dates   |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| SFY 2028 ITA (due 10/31/2026)                                     |            |     |     |     |     |     |     |     |     |     | ■   |     |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| SFY 2027 Funding List Published (EOY 2026)                        |            |     |     |     |     |     |     |     |     |     |     | ■   |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| SFY 2027 Executed Construction Contracts & Loan Close (5/31/2027) |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     | ■   |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| SFY 2027 Construction (Summer/Fall 2027)                          |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     | ■   | ■   | ■   | ■   | ■   | ■   | ■   |            |     |     |     |     |     |     |     |     |     |     |     |
| SFY 2028 Application (due 6/30/2027)                              |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| SFY 2028 Funding List Published (EOY 2027)                        |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| SFY 2028 Executed Construction Contracts & Loan Close (5/31/2028) |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |
| SFY 2028 Construction (Summer/Fall 2028)                          |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |            |     |     |     |     |     |     |     |     |     |     |     |

## SDWLP Timeline

|                             | OCT  | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |  |
|-----------------------------|--|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|
| SDWLP / LSL Projects        | State Fiscal Year (FY)   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             | ITA Due  |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             |  |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             |  |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             |  |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
| Municipality/ Utility Tasks | Preliminary Engineering & Design - Cost Estimates - Regulatory Approvals (DNR-PSC)<br>PSC rate case approval (submit in Jun) |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             | Project Bidding - Contract Award - Board/Council Approval - Pre-Loan Documents   |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             |  |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                             | Construction Begins after closing  |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |  |

**\*\*SCHEDULE IS BASED ON ESTIMATED PROJECT TIMELINES. WEATHER IMPACTS COULD IMPACT SCHEDULE. IMPACTS TO SCHEDULE WILL BE COORDINATED WITH CITY DURING PROJECT**

# SECTION 6: FEE PROPOSAL

# FEE PROPOSAL

GRAEF has prepared the following cost proposal in accordance with the **City of Fort Atkinson's Lead Service Lateral Replacement Plan** Request for Proposal requirements. The proposed rates reflect all labor, overhead, and incidental expenses, including travel, meals, and mileage. Only document reproduction costs will be considered reimbursable.

Two separate cost breakdowns are provided:

- Tasks 1–5
- Task 6

Our cost proposal is based on the scope of services outlined in the RFP and our understanding of the project requirements. **These fees are estimates based on the parameters and assumptions provided in our proposal.** Should the City request any modifications to the scope, GRAEF will provide an updated cost proposal for review and approval prior to proceeding.

| 2028 GRAEF Rates |             |         |
|------------------|-------------|---------|
| Classification   | Raw Rate/hr | Rate/hr |
| P9               | \$85        | \$255   |
| P8               | \$80        | \$240   |
| P7               | \$75        | \$225   |
| P6               | \$70        | \$210   |
| P5               | \$60        | \$180   |
| P4               | \$55        | \$165   |
| P3               | \$50        | \$150   |
| P2               | \$45        | \$135   |
| P1               | \$40        | \$120   |
| T6               | \$65        | \$195   |
| T5               | \$55        | \$165   |
| T4               | \$50        | \$150   |
| T3               | \$45        | \$135   |
| T2               | \$40        | \$120   |
| T1               | \$35        | \$105   |
| Administrative   | \$33        | \$99    |

**\*\*Rates for 2026 and 2027 will not be based on full 2028 rates. Rates will gradually increase, yearly, to 2028 range.**

| GENERAL INFORMATION |                           |
|---------------------|---------------------------|
| Project Name:       | Lead Service Lateral Plan |
| Client Name:        | Fort Atkinson             |
| Date:               | 3/2/26                    |



| DISCIPLINE SUMMARY |             |                 |                |                 |                |
|--------------------|-------------|-----------------|----------------|-----------------|----------------|
| Discipline         | Total Hours | Total Labor     | Total Expenses | Total Cost      | % of Total Fee |
| City Water         | 385         | \$70,980        | \$0            | \$70,980        | 80%            |
| Civil              | 104         | \$17,656        | \$200          | \$17,856        | 20%            |
| <b>Total Fee</b>   | <b>489</b>  | <b>\$88,636</b> | <b>\$200</b>   | <b>\$88,836</b> | <b>100%</b>    |

| DESIGN PHASE SUMMARY  |             |                 |                |                 |                |
|-----------------------|-------------|-----------------|----------------|-----------------|----------------|
| Design Phase          | Total Hours | Total Labor     | Total Expenses | Total Cost      | % of Total Fee |
| Project Kickoff/Setup | 70          | \$13,915        | \$200          | \$14,115        | 16%            |
| Task 1                | 44          | \$7,346         | \$0            | \$7,346         | 8%             |
| Task 2                | 154         | \$26,502        | \$0            | \$26,502        | 30%            |
| Task 3                | 70          | \$13,656        | \$0            | \$13,656        | 15%            |
| Task 4                | 89          | \$15,932        | \$0            | \$15,932        | 18%            |
| Task 5                | 60          | \$11,286        | \$0            | \$11,286        | 13%            |
| <b>Total Fee</b>      | <b>489</b>  | <b>\$88,636</b> | <b>\$200</b>   | <b>\$88,836</b> | <b>100%</b>    |

| 2026 Rates     |         | 2027 Rates     |         | 2028 Rates     |         |
|----------------|---------|----------------|---------|----------------|---------|
| Classification | Rate/hr | Classification | Rate/hr | Classification | Rate/hr |
| P9             | \$240   | P9             | \$249   | P9             | \$255   |
| P8             | \$225   | P8             | \$234   | P8             | \$240   |
| P7             | \$210   | P7             | \$219   | P7             | \$225   |
| P6             | \$195   | P6             | \$204   | P6             | \$210   |
| P5             | \$165   | P5             | \$174   | P5             | \$180   |
| P4             | \$150   | P4             | \$159   | P4             | \$165   |
| P3             | \$135   | P3             | \$144   | P3             | \$150   |
| P2             | \$120   | P2             | \$129   | P2             | \$135   |
| P1             | \$105   | P1             | \$114   | P1             | \$120   |
| T6             | \$180   | T6             | \$189   | T6             | \$195   |
| T5             | \$150   | T5             | \$159   | T5             | \$165   |
| T4             | \$135   | T4             | \$144   | T4             | \$150   |
| T3             | \$120   | T3             | \$129   | T3             | \$135   |
| T2             | \$105   | T2             | \$114   | T2             | \$120   |
| T1             | \$90    | T1             | \$99    | T1             | \$105   |
| Administrative | \$99    | Administrative | \$99    | Administrative | \$99    |

# CITY OF FORT ATKINSON



**Ruekert & Mielke, Inc.**

4630 S. Biltmore Lane  
Madison, WI 53718

**Samantha Boman, P.E.**

Project Manager  
sboman@ruekert-mielke.com  
608.572.7972

## Lead Service Line Replacement Plan

March 2, 2026

March 2, 2026

Zach Navin  
Director of Public Works  
City of Fort Atkinson  
101 N. Main Street  
Fort Atkinson, WI 53538

Re: Lead Service Line Replacement Plan

Dear Zach:

Ruekert & Mielke, Inc. (R/M) is pleased to submit our proposal to support the Fort Atkinson Water Utility (FAWU) in developing a Lead Service Line (LSL) Replacement Capital Plan. Our team brings extensive experience delivering complex water infrastructure projects across Wisconsin, including comprehensive LSL replacement programs, and is well prepared to complete the scope outlined in the Request for Proposal.

Ruekert & Mielke has been actively supporting municipal lead service line replacement programs since 2017, providing planning, funding support, design, construction administration, and community outreach services for water utilities throughout Wisconsin.

R/M has successfully secured and administered Safe Drinking Water Loan Program funding for multiple communities throughout Wisconsin. Our proposed Project Manager, Sam Boman, has personally secured this funding for multiple communities, helping utilities advance their water system goals while maintaining regulatory compliance and financial efficiency.

To further support FAWU, our team includes Jacobs Engineering as a strategic subconsultant. Jacobs currently serves as the technical assistance provider to WDNR for the City of Fort Atkinson and brings direct familiarity with the LSL Replacement program and state level requirements. Their involvement strengthens alignment with WDNR expectations and enhances overall program efficiency.

R/M is committed to helping FAWU achieve its LSL replacement goals. We understand the importance of protecting public health and maintaining community trust through timely lead service line removal. Our Client Liaison, Andy Burt, currently serves as the Interim City Engineer for Fort Atkinson. This role positions our team to deliver the project as efficiently as possible by strategically coordinating LSL replacements with other active infrastructure projects throughout the City.

We look forward to this opportunity. Please let us know if we can answer any questions you may have.

Sincerely,  
RUEKERT & MIELKE, INC.



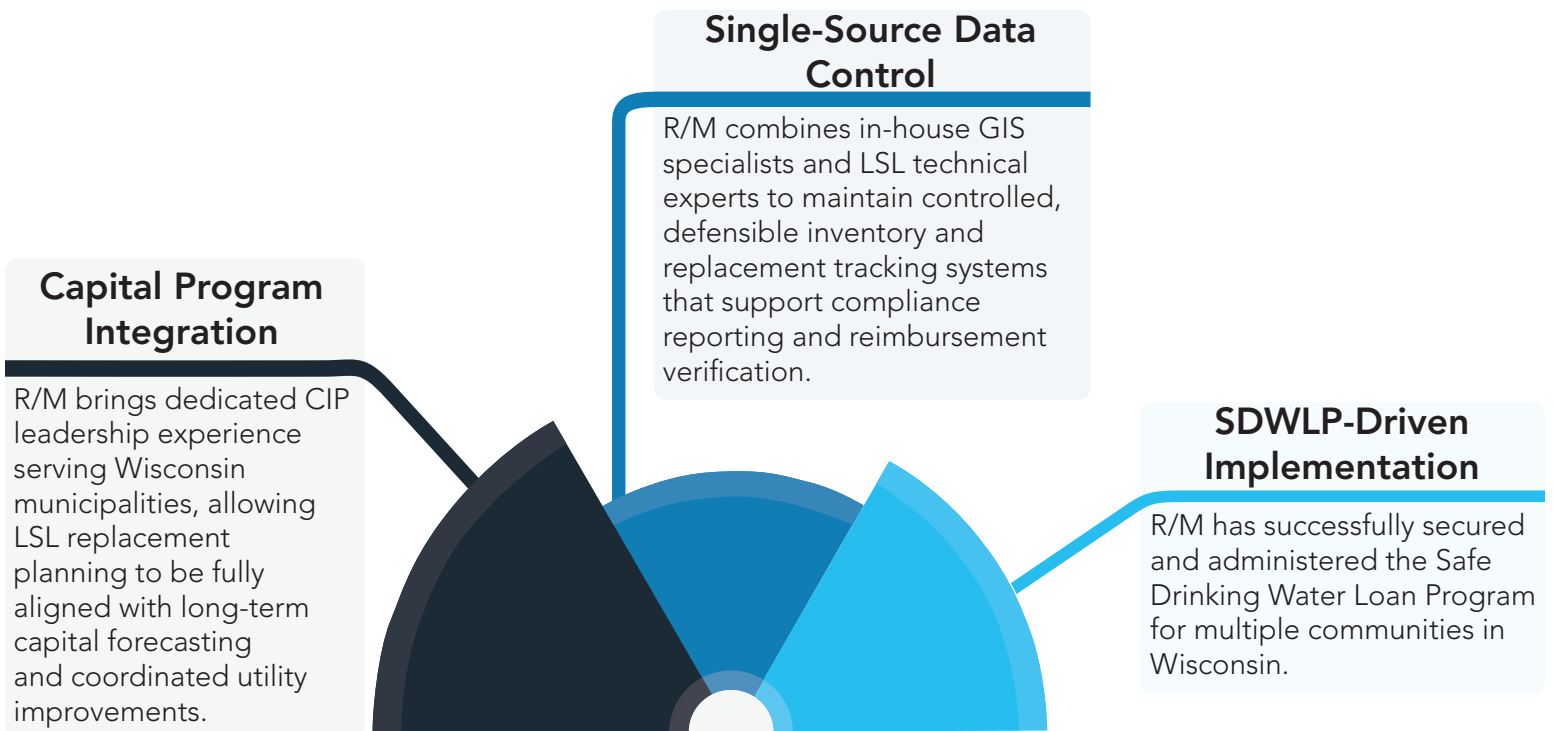
Samantha E. Boman, P.E.  
Project Manager  
sboman@ruekert-mielke.com  
608.572.7972



Ryan T. Amtmann, P.E.  
Vice President (Contract Authorization Officer)  
ramtmann@ruekert-mielke.com  
262.953.3002

# TABLE OF CONTENTS:

|           |                       |           |                  |
|-----------|-----------------------|-----------|------------------|
| <b>5</b>  | PROJECT PERSONNEL     | <b>22</b> | PROJECT TIMELINE |
| <b>16</b> | PROJECT EXAMPLES      | <b>24</b> | FEE PROPOSAL     |
| <b>19</b> | PROJECT UNDERSTANDING |           |                  |



## KEY DIFFERENTIATORS



# Ruekert • Mielke

YOUR INFRASTRUCTURE ALLY

Ruekert & Mielke, Inc. (R/M) is a 100% employee-owned civil engineering firm with **more than 75 years of service** to local communities and organizations. Our engineers, environmental scientists, agricultural experts, and technology consultants empower our clients to thrive by solving infrastructure challenges.

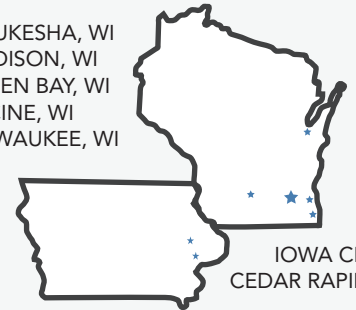
## ABOUT

- Established in 1946
- 125+ Employees Located in Wisconsin & Iowa
- 8x Top Workplace

**100%**  
**EMPLOYEE OWNED**

## LOCATIONS

WAUKESHA, WI  
MADISON, WI  
GREEN BAY, WI  
RACINE, WI  
MILWAUKEE, WI



IOWA CITY, IA  
CEDAR RAPIDS, IA

## SERVICES



AGRICULTURE



CONSTRUCTION SERVICES



DRONE & SURVEY



ENVIRONMENTAL



MECHANICAL, ELECTRICAL, PLUMBING, TECHNOLOGY



FINANCE



GIS



MUNICIPAL



PAVEMENT MANAGEMENT



STREETS & ROADS



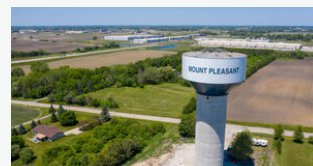
STRUCTURAL



SITE DEVELOPMENT



WASTEWATER



WATER & SCADA



WATER RESOURCES

# ORGANIZATIONAL CHART



F O R T • A T K I N S O N

Quality Assurance/  
Quality Control

Jason Lietha, P.E.  
*Ruekert & Mielke, Inc.*



Principal in  
Charge

Andrew W. Burt, P.E.,  
LEED Green Assoc,  
ENV SP  
*Ruekert & Mielke, Inc.*



Project Manager

Samantha Boman,  
P.E.  
*Ruekert & Mielke, Inc.*



Water/  
Wastewater Lead

Ryan Spackman, P.E.  
*Ruekert & Mielke, Inc.*



CIP Expert

Kevin Wagner, P.E.  
*Ruekert & Mielke, Inc.*



LSL Replacement  
Lead

Nora Kodis, P.E.  
*Jacobs Engineering*



GIS Analyst

Enrika Hlavacek  
*Ruekert & Mielke, Inc.*



LSL Technical  
Assistance

Rahim Ansari, E.I.T.  
*Jacobs Engineering*





**Samantha Boman, P.E.** has more than five years of experience in municipal engineering and private site design. She has prepared plans, specifications, and cost estimates for roadway and utility reconstruction projects and coordinated closely with City staff throughout design and permitting. Samantha has prepared and submitted WDNR permits and Safe Drinking Water Loan Program (SDWLP) Intent to Apply (ITA) and funding applications for multiple Wisconsin communities.

**Title:** Project Manager | **Years of Experience:** +5 **Certification(s):** P.E.

**Education:** B.S. Civil Engineering, University of Wisconsin Platteville



**Kevin Wagner, P.E.** supports municipalities with long-range capital improvement planning and infrastructure management. As City/Village Engineer for multiple Wisconsin communities, he integrates utility replacement projects with 20-year Capital Improvement Plans and funding strategies, including Clean Water and Safe Drinking Water programs.

**Title:** CIP Expert | **Years of Experience:** +15 **Certification(s):** P.E.

**Education:** B.S. Civil Engineering, University of Wisconsin Milwaukee



**Enrika Hlavacek** develops and manages GIS systems that support municipal infrastructure tracking and reporting. She has created LCRR inventory dashboards and ArcGIS Online applications that assist communities with service line identification, data management, and public communication tools.

**Title:** GIS Analyst | **Years of Experience:** +10

**Education:** M.S. Geographic Information Systems (GIS), University of Redlands, CA



**Ryan Spackman, P.E.** brings extensive experience in municipal infrastructure projects and a strong understanding of regulatory requirements, project coordination, and client service. His background supports efficient delivery and clear communication throughout the project lifecycle.

**Title:** Water/Wastewater Lead | **Years of Experience:** +15

**Education:** B.S. Civil Engineering, Portland State University

**Andrew Burt, P.E.** will serve as the Principal in Charge and **Jason Lietha, P.E.** will provide quality assurance and quality control for this project.

# Jacobs



**Nora Kodis, P.E.** leads service line inventory and replacement planning efforts under the Wisconsin DNR LCRR/LCRI Technical Assistance Program. She oversees inventory QA/QC, compliance sampling, and development of service line replacement plans for water systems statewide.

**Title:** LSL Replacement Lead | **Years of Experience:** +9 **Certification(s):** P.E.

**Education:** M.S. Environmental Engineering



**Rahim Ansari, E.I.T.** provides technical support to communities implementing LCRR/LCRI requirements, including service line inventory development, replacement planning, funding evaluation, and regulatory coordination. He supports planning, design, and construction documentation efforts.

**Title:** LSL Technical Assistance | **Years of Experience:** +5

**Education:** B.S. Civil and Environmental Engineering, University of Wisconsin Madison



# SAMANTHA E. BOMAN, P.E.

PROJECT MANAGER

Sam has more than five years of experience in municipal engineering and private site design. Her expertise includes topographical survey, design, analysis, permitting, inspection, and drafting for storm water management facilities, roadways, outdoor adventure parks, hotels, parking lots, boat launches, and water main, sanitary sewer, and storm sewer rehabilitation projects. She is also proficient in Civil 3D, AutoCAD, HydroCAD, and WinSLAMM.

## CONTACT

608.572.7972  
sboman@ruekert-mielke.com  
Madison

## EDUCATION

- Bachelor of Science in Civil Engineering, Environmental Emphasis- University of Wisconsin, Platteville

## REGISTRATIONS & AFFILIATIONS

- Professional Engineer - WI

## EXPERIENCE

### 2026 Water Relay and Road Rehabilitation

City of Fort Atkinson

Prepared plans, specifications, and a construction cost estimate for a full road reconstruction and utility replacement project. Worked closely with City officials to review alternatives, refine design elements, and develop the final plan. Conducted multiple site visits to document existing conditions and performed utility measure downs to verify field information and support accurate design.

### West School Street Reconstruction

City of Columbus

Prepared plans, specifications, and a construction cost estimate for a six block full road reconstruction and utility replacement project. Coordinated with City staff to develop the final plan and facilitated public information meetings with residents. Worked with the Wisconsin Historical Society to ensure proper protection when working near a possible burial site. Prepared and submitted DNR permits for water, sanitary sewer, and construction site storm water.

### Heritage Way Water Main Extension

Columbus Utilities

Prepared plans, specifications, and a construction cost estimate for a two thousand foot water main extension project. Worked with City officials throughout the design process to review alternatives and develop the final plan. Prepared and submitted DNR permits for the water main extension and construction site storm water.

### LRIP Grant Application

City of Columbus

Prepared and submitted the WisDOT LRIP grant application for the W School Street project. Completed the project narrative and application form, coordinated with City officials to secure letters of support, and ensured all documentation met program requirements.

### SDWLP ITA and Application\*

Multiple Communities

Prepared and submitted the Intent to Apply (ITA) and Safe Drinking Water Loan Program (SDWLP) application to WDNR for multiple communities including;

- City of Markesan
- Village of Poyette
- Village of Iron Ridge

Completed the Engineering Reports, plans, and specifications to submit with the applications and ensured all documentation met program requirements.



# KEVIN J. WAGNER, P.E.

CIP EXPERT

*Kevin has worked as a design engineer on civil and municipal projects, with a focus on infrastructure management and planning. Kevin has extensive work in capital planning and asset management.*

## EXPERIENCE

### Capital Improvement Plan

#### Erie Sewer Authority

R/M and Hazen Sawyer worked with the Erie Sewer Authority in Pennsylvania on an update to their long-range Capital Improvement Plan. Kevin worked as the Asset Management Lead for this project, which included a full assessment of the Treatment Plant facility, identification of potential projects, workshops with authority staff to prioritize and rank projects based on condition, risk and criticality, and development of a \$150 million 15-year CIP.

### SDWLP and CWF Loan Program Application/Administration

- City of Peshtigo
- City of Antigo
- Village of Mishicot
- Village of Kellnersville
- Village of North Fond du Lac

### Capital Improvement Planning & Asset Management

- Erie Sewer Authority
- Village of Ashwaubenon
- Village of Somers
- Village of Bonduel
- Village of Hartland
- City of Milton
- Village of Howard
- City of La Crosse
- Village of Huntley
- City of Batavia

### Water Facility Planning, Design & Construction

- City of Neenah
- Village of Bonduel
- City of Antigo
- City of Stevens Point
- Village of Kellnersville

### Water Main Design and Construction

- City of Menasha
- City of Stevens Point
- Village of Bonduel
- City of Antigo
- Village of Mishicot
- City of Oconomowoc
- City of Tomahawk
- Town of Randall
- City of Pewaukee
- Village of Thiensville

## CONTACT

920.486.6627  
kwagner@ruekert-mielke.com  
Green Bay

## EDUCATION

- Bachelor of Science in Civil Engineering, - University of Wisconsin, Milwaukee

## REGISTRATIONS & AFFILIATIONS

- Professional Engineer - WI
- Wisconsin Society of Professional Engineers
- American Council of Engineering Companies of Wisconsin
- Institute of Asset Management



# ENRIKA J. HLAVACEK

GIS ANALYST

Enrika has more than ten years of GIS experience, including a strong knowledge of web map and application development, data collection, management, and integration, requirements gathering. More recently, Enrika's focus has been on ArcGIS Online administration and customized application development to seamlessly support public-facing communication apps and internal editing workflows.

## EXPERIENCE

### ArcGIS Online Development and Implementation

Enrika has extensive experience creating, configuring, and managing web maps, applications, dashboards, hubs, experiences, Story Maps, and a variety of field data collection apps offered as part of the ArcGIS Online platform.

- Village of Shorewood
- City of Atchison, KS
- Village of Elm Grove
- Village of Howard
- Village of Huntley, IL
- Kewaunee County
- City of Ottawa, KS
- Village of Slinger
- City of Stevens Point
- Village of Thiensville
- Wachtel Tree Science
- Village of Waunakee
- Wheaton Sanitary District, IL

### LCRR Inventory Tracking Dashboards

To assist municipalities with identifying gaps in the LSL inventories, Enrika deployed ArcGIS Online dashboards, configured to each client's data, to find remaining unknown service line materials.

- Village of Slinger
- Racine Water Utility
- City of Antigo

### Illicit Discharge Detection and Elimination (IDDE) for MS4 Permitting

*Ruekert & Mielke, Inc.*

Enrika developed an ArcGIS Online solution using Field Maps and Survey123 to streamline field data collection for staff performing annual outfall IDDE inspections, including generating outputs for annual report submissions.

### Public Information Applications

*City of Stevens Point*

Enrika has assisted the City of Stevens Point with keeping their residents informed by developing ArcGIS Online applications to improve communication and government transparency. Searching their address, residents can find their garbage and recycling pickup schedule, or visually learn about ongoing road construction projects in their neighborhood.

## CONTACT

- 262.542.5733
- [ehlavacek@ruekert-mielke.com](mailto:ehlavacek@ruekert-mielke.com)
- Waukesha

## EDUCATION

- Master of Science, Geographic Information Systems (GIS) - University of Redlands, CA
- Bachelor of Science, Geography - University of Wisconsin, La Crosse

## REGISTRATIONS & AFFILIATIONS

- Wisconsin Land Information Association

10+

» years «  
experience



# RYAN B. SPACKMAN, P.E.

WATER/WASTEWATER LEAD

*Ryan brings more than 17 years of experience managing municipal water and wastewater projects. He has led all phases of water and wastewater infrastructure work from planning and testing through final design while ensuring full compliance with state and federal regulatory standards. Drawing on more than a decade of municipal sector experience, Ryan approaches each project with a strong understanding of client perspectives, needs, and expectations. His leadership and communication skills enable him to effectively coordinate with municipal officials and community stakeholders, maintain schedules and budgets, and consistently deliver reliable infrastructure solutions that exceed client expectations.*

## CONTACT

262.953.4104  
rspackman@ruekert-mielke.com  
Kenosha

## EDUCATION

- Bachelor of Science, Civil Engineering - Portland State University

## REGISTRATIONS & AFFILIATIONS

- American Water Works Association
- Municipal Waterworks Operator, Wisconsin, Distribution and Surface Water
- Professional Engineer - WI, IL, IA

10+

» years «  
experience

## EXPERIENCE

### Well 4 Rehabilitation and Well 5 Replacement

#### Village of Fontana

Ryan supported planning and execution for the rehabilitation of Well 4 and the development of a new production well to replace its capacity. Work included pump removal and inspection, geophysical logging, dynamic testing to identify water quality issues, and coordination with WDNR under NR 811 requirements. Ryan oversaw integration of mechanical and chemical treatment upgrades maintaining compliance with state standards.

### Lead Service Line and Water Main Replacement 2025/26

#### Racine Water Utility

Ryan assisted the Racine Water Utility with completion of their Safe Drinking Water Loan (SDWL) Program applications for state fiscal year 2026 and 2027. His work contributed to the successful award of approximately \$46 million in SDWL funding across both years.

### Temporary PFAS Treatment Well 6

#### Village of Pewaukee

Ryan has been assisting the Village with the completion of the Safe Drinking Water Loan application for the installation of a temporary PFAS treatment facility at a Village of Pewaukee well site.

### Local Watermain Replacement SFY 2026

#### Racine Water Utility

Managed multidisciplinary design teams for the replacement of approximately 40,000 linear feet of aging water distribution main in dense urban corridors for the City of Racine, directly supporting a large-scale Lead Service Line Replacement program. Oversaw all aspects of design, including public-side lead service line replacements, to address failing infrastructure that could no longer be tapped and to advance systemwide lead reduction goals

## Nora Kodis, PE — Technical Assistance

Nora is a water engineer with nine years of industry experience. Her distinct areas of practice include distribution system water quality, lead and copper compliance, and comprehensive water quality monitoring programs. She has served as the technical lead or project manager on ten corrosion control treatment (CCT) studies and conceptual designs aimed at improving or maintaining distribution system water quality. Nora's water chemistry focus laid the groundwork for her contributions to the WI LCRR/LCRI TA program, and her outstanding skillset in LCRR and LCRI compliance. Nora is a creative thinker and an enthusiastic problem solver. She engages with project stakeholders by actively listening, asking questions, and facilitating an environment of collaboration.

### REPRESENTATIVE PROJECTS

**Task Lead, Wisconsin Department of Natural Resources, Service Line Inventory and LCRR/LCRI Technical Assistance (TA) Program, WI. (2023 - Present).** Task lead overseeing outreach and site visits, replacement plans, and compliance sampling for the statewide TA program supporting over 400 Wisconsin water systems. Directed site visits for more than 300 water systems, led a statewide field team of 30+ staff and interns. Developed workflows, SOPs, quality control plans, and communication materials including program flyers and summaries of lead and copper regulatory guidance.

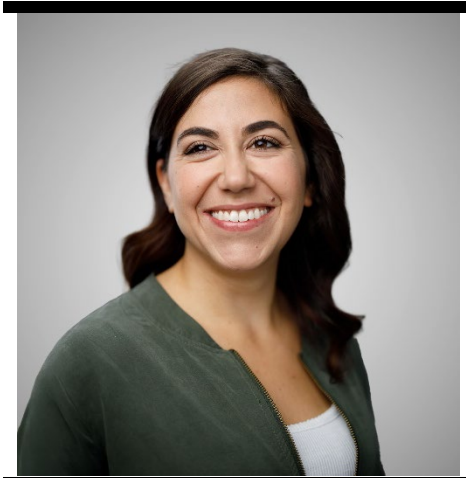
**Project Manager, CCT Preliminary Design, Appleton, WI. (2022).** Utilized CCT study findings to develop a conceptual design report for the implementation of phosphoric acid chemical addition for CCT optimization. Managed contract scoping, staff task assignments, schedule, and budget.

**Assistant Project Manager, Root River Water Quality Monitoring Program, Waukesha, WI. (2017 - 2025).** Developed a multi-year monitoring program to baseline chemical and biological river water quality and assess discharge impacts. Managed local Jacobs staff and university partners, oversaw field work, directed digital tools development, analyzed and reported results.

**Engineer/Technical Lead, Multiple Clients, CCT Optimization. (2017 - 2024).** Designed and conducted desktop and/or

demonstrative CCT studies for multiple clients including City of Waukesha, Waukesha, WI, City of Appleton, Appleton, WI, City of Oshkosh, Oshkosh, WI, Milwaukee Water Works, Milwaukee, WI, City of Brandon, Manitoba, CA, City of Woodbury, Woodbury, MN, Regional Water Authority, New Haven, CT, St. Paul RWS, St. Paul, MN, NY American Water, Lynbrook, NY.

**Engineer, Oshkosh LCR Compliance Assistance, City of Oshkosh, Oshkosh, WI. (2020).** Developed comprehensive materials to support the implementation of a multi-year lead service line replacement program, including public outreach flyers, legal ordinance guidance, and detailed technical and legal documentation for replacement procedures.



### Relevant Qualifications

- Task lead for outreach, inventory QA/QC, service line replacement plans, and compliance tap sampling under the WI TA Program
- Led numerous lead-related CCT optimization studies in North America
- Experience supporting distribution system water quality improvements for management of lead, copper, iron and manganese

### Degrees, Certifications, Licenses

- M.S., Environmental Engineering
- B.S., Civil and Environmental Engineering
- Professional Engineer: WI

**Total Years of Experience: 9**

**Years With Jacobs: 9**

## Rahim Ansari—*Technical Assistance*

### Education and Professional Registrations

BS, Civil and Environmental Engineering, University of Wisconsin—Madison

MEng, Environmental Engineering, University of Wisconsin—Madison

### Relevant Experience

Rahim Ansari is a Project Engineer with 5 years of experience in evaluating, planning, design, rehabilitation, and construction of numerous water/wastewater projects and capital improvement plans. Rahim has also helped clients navigate the intricacies of regulatory requirements, state and federal funding, sewer rate impacts, industrial user agreements, City Ordinance revisions, and has held various client and public-facing roles and responsibilities. He has worked with the project owners, operating staff, project stakeholders and the public, as well as state regulatory and local agencies, to provide information, calculations, and recommendations to communities of varying size and background. Through design and implementation of his projects, Rahim has balanced cost-effective solutions, industry standards, and the requirements of local and state regulations to deliver quality solutions to communities. He has participated in every aspect of project implementation including project development and design; environmental assessments; public outreach and participation; value engineering efforts; preparation and submittal of plans and specifications for state approvals; construction sequencing and temporary operations; funding evaluation; bidding; and construction observation.



### Representative Projects

**Technical Team Leader, LCRR/LCRI Technical Assistance Project, DNR, Statewide, WI.** Rahim leads a team dedicated to providing technical assistance to communities across the state for LCRR/LCRI compliance. Activities include coordinating frequently with other project teams and water utility personnel to: develop and improve water service line inventories; educate and support them on meeting the many facets and regulatory requirements of the LCRR/LCRI, including consumer and public notifications, public education, compliance monitoring, school and childcare testing, non-lead verification and Service Line Replacement Plans (SLRPs); assists communities in planning and executing field verification of service line material; assisting the community in preparing SLRPs, planning service line replacement and developing funding strategies.

**\*Designer, Client Manager, and Resident Project Representative, Lakeland WWTF Facility Planning, Design, and Construction, Lakeland Sanitary District, Minocqua, WI.** The existing Lakeland Wastewater Treatment Facility (WWTF) needed significant upgrades to address critical system deficiencies in existing treatment processes and essential infrastructure such as electrical, mechanical and structural improvements, all of which needed modernization to sustain reliable operations and permit compliance. Rahim evaluated the existing wastewater facilities, conducted funding and financial (cost estimating, sewer rate) analysis, discussed and addressed operating staff concerns, developed scope of upgrades, coordinated disciplines and drafting team for project kick-off, designed upgrades, coordinated with owner, contractor, and public agencies, acted as client manager by attending Board meetings, providing updates, interacting with public, completing and submitting plans and reports per WPDES Permit, and providing additional professional services to client.

**\*Designer and Interim Project Manager, Boyceville WWTF Facility Planning, Design, and Cost of Service Study, Village of Boyceville, WI.** This project included evaluation of wastewater treatment and conveyance systems, including lift station upgrades, collection system rehabilitation, lagoon treatment modeling, impacts of future contributions from large industrial users, and cost of service analysis for the utility. Rahim completed facility evaluation, developed scope of upgrades, conveyed facility planning information and preliminary design decisions, provided client regular updates, acted as interim project manager, designed aeration system upgrades and minor site improvements, and assisted in the design of lift station improvements. Rahim collaborated with Client’s legal team for City Ordinance and industrial agreement revisions and negotiations, conducted Cost of Service study and utilized findings to propose new sewer rates for residential and industrial users.

*\*Denotes project was completed while with previous employer.*

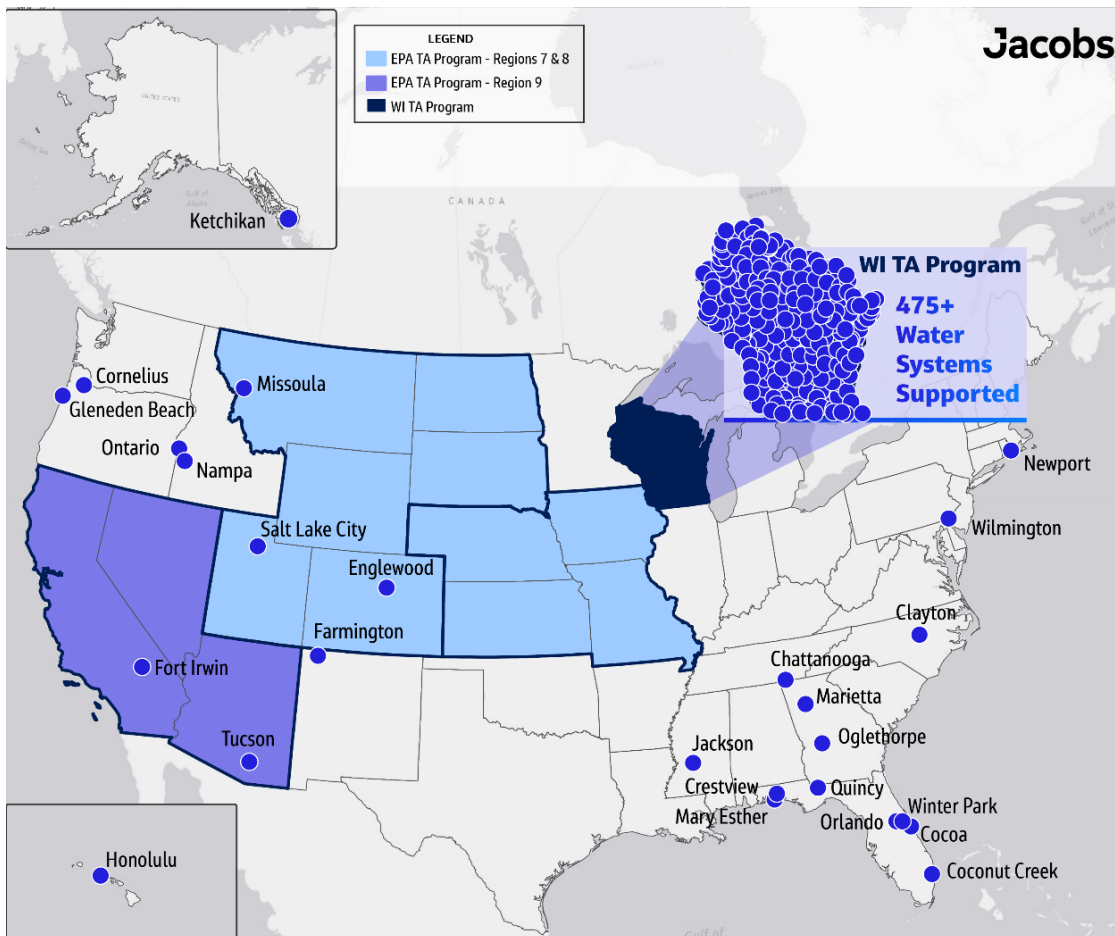
## Experience and Qualifications

### Relevant Experience

Jacobs brings extensive experience implementing LCRR and LCRI programs for water systems across the United States, combining technical rigor with deep regulatory and industry expertise in lead and copper rule compliance. Our national subject matter experts have led inventory development, compliance planning, and public communication initiatives for utilities such as JXN Water in Jackson, MS, the City of Cocoa, FL, and Honolulu Board of Water Supply, while our local lead and copper experts have conducted similar LCRR and LCRI implementations for communities all across Wisconsin.

Serving as WDNR’s sole technical assistance provider for LCRR/LCRI implementation since 2023, Jacobs is uniquely qualified to support these compliance requirements. Through the WI TA Program, we have assisted more than 475 water systems statewide with inventory development, customer notifications, and compliance activities, establishing efficient, WDNR-aligned processes for data collection, documentation, and QA/QC. This experience allows us to target effort where it will deliver the greatest value—refining and strengthening MWU’s inventory in alignment with evolving requirements—while leveraging WI TA Program supported services to reduce overall project costs. Recent projects that further illustrate Jacobs LCRR and LCRI inventory experience and ability to translate regulatory requirements into practical, utility-focused solutions are outlined **Exhibit 1**. All projects shown include service line inventory development, and nearly all include additional support to meet LCRR and LCRI requirements such as consumer notification development, call center management, and inventory webpage support.

**Exhibit 1. Jacobs’ Service Line Inventory Project Experience**



| LCRR/LCRI Project; Key Staff   | Summary of Jacob's Recent LCRR and LCRI Experience |                                     |   |                     |                          |                           |                               |                         |                       |
|--|--|-------------------------------------|---|---------------------|--------------------------|---------------------------|-------------------------------|-------------------------|-----------------------|
|  | Service Line Inventory                             | Consumer Notifications and Outreach | Public-Facing Web Application, Customer Survey or Website | Call Center Support | Service Line Replacement | Compliance Tap Monitoring | School & Childcare Monitoring | Regulatory Coordination | GIS/Digital Solutions |
| <b>Wisconsin DNR   WI (2023-Present);</b> C. Wunderlich, N. Kodis, L. Wasserstrom, J. Liggett, D. Patterson, N. Lenz, J. Brusso, M. Ramirez-Taylor, K. O'Malley, R. Ansari | ✓  | ✓                                   |   | ✓                   | ✓                        | ✓                         | ✓                             | ✓                       | ✓                     |
| <b>City of Cocoa   Cocoa, FL (2020-Present);</b><br>L. Wasserstrom, J. Liggett   | ✓  | ✓                                   | ✓   | ✓                   | ✓                        | ✓                         | ✓                             | ✓                       | ✓                     |
| <b>JXN Water   Jackson, MS (2023-Present);</b><br>L. Wasserstrom, J. Liggett   | ✓  | ✓                                   | ✓   | ✓                   | ✓                        | ✓                         | ✓                             | ✓                       | ✓                     |
| <b>City of Newport   Newport, RI (2022-Present);</b><br>L. Wasserstrom, J. Liggett, M. Ross  | ✓  | ✓                                   | ✓   | ✓                   | ✓                        | ✓                         | ✓                             | ✓                       | ✓                     |
| <b>City of Wilmington   Wilmington, DE (2023-Present);</b><br>L. Wasserstrom, J. Liggett   | ✓  | ✓                                   | ✓   | ✓                   | ✓                        | ✓                         | ✓                             | ✓                       | ✓                     |
| <b>Honolulu Board of Water Supply   Honolulu, HI (2021-Present);</b> J. Liggett, E. Clark, M. Ross   | ✓  | ✓                                   | ✓   |                     | ✓                        | ✓                         | ✓                             | ✓                       | ✓                     |
| <b>US EPA   Regions 7 &amp; 8 (2024-Present);</b><br>C. Wunderlich, N. Kodis, L. Wasserstrom   | ✓  | ✓                                   |   |                     |                          |                           |                               | ✓                       |                       |
| <b>US EPA   Region 9 (2024-Present);</b> L. Wasserstrom  | ✓  | ✓                                   |   |                     |                          |                           |                               | ✓                       |                       |
| <b>Salt Lake Department of Public Utilities   Salt Lake City, UT (2021-Present);</b> J. Liggett  | ✓  | ✓                                   |   |                     | ✓                        | ✓                         | ✓                             | ✓                       |                       |
| <b>City of Mary Esther   Mary Esther, FL (2023-Present);</b><br>L. Wasserstrom   | ✓  | ✓                                   |   |                     |                          |                           | ✓                             | ✓                       |                       |
| <b>City of Crestview   Crestview FL (2024-Present);</b><br>L. Wasserstrom  | ✓  | ✓                                   |   |                     |                          |                           | ✓                             | ✓                       |                       |
| <b>Eastside Utility District   Chattanooga, TN (2023-Present);</b> L. Wasserstrom, J. Liggett  | ✓  | ✓                                   | ✓   | ✓                   |                          |                           |                               | ✓                       | ✓                     |
| <b>OCU Bithlo Community Park   Orlando, FL (2025);</b><br>L. Wasserstrom, J. Liggett   | ✓  | ✓                                   |   |                     |                          |                           |                               | ✓                       |                       |
| <b>Meridian Metropolitan District   Englewood, CO (2024);</b> J. Liggett, L. Wasserstrom, E. Clark   | ✓  | ✓                                   |   |                     |                          | ✓                         | ✓                             | ✓                       | ✓                     |
| <b>Ketchikan Public Utilities   Ketchikan, AK (2024);</b><br>J. Liggett, E. Clark  | ✓  |                                     |   |                     |                          |                           |                               |                         | ✓                     |
| <b>City of Coconut Creek   Coconut Creek, FL (2024);</b><br>J. Liggett   | ✓  | ✓                                   |   |                     |                          |                           | ✓                             | ✓                       |                       |
| <b>Town of Clayton   Clayton, NC (2023);</b><br>L. Wasserstrom   | ✓  |                                     |   |                     |                          |                           |                               | ✓                       | ✓                     |
| <b>Orange County Utilities   Orlando, FL (2021-2022)</b><br>L. Wasserstrom   | ✓  |                                     |   |                     |                          |                           |                               | ✓                       |                       |

## Detailed Project Descriptions

These projects further demonstrate our team’s technical expertise, regulatory knowledge, and recent LCRR/LCRI compliance support services, focused on service line inventory, consumer notifications and public outreach tools.

## Wisconsin LCRR/LCRI Technical Assistance Program

**Client:** Wisconsin Department of Natural Resources (WDNR)

**Project Dates:** 2023-Present

**Key Staff:** Cathy Wunderlich, Nora Kodis, Lauren Wasserstrom, Jennifer Liggett, Dave Patterson, Natalie Lenz, Jennifer Brusso, Maria Ramirez-Taylor, Kassidy O’Malley, Rahim Ansari

### Project Description

The WDNR contracted Jacobs to provide technical assistance to community water systems (CWSs) statewide to develop and refine service line inventories in compliance with the LCRR and to prepare for the upcoming LCRI compliance date. To date, we have supported more than 475 CWSs with their service line inventories, consumer notifications, and targeted assistance to address compliance violations. Key program tasks include outreach to water systems, onsite and virtual records review, inventory data entry and quality control, and development of inventory improvement plans to refine initial inventories and identify service line materials. We also provide support for compliance reporting and consumer notifications.

As part of this program, Jacobs developed a consistent, WDNR-aligned process for compiling records, classifying service line materials, and documenting methods and data sources. We also provide tailored system support based on specific needs, such as evaluating inventories for compliance and improvement and providing GIS-based inventory support.

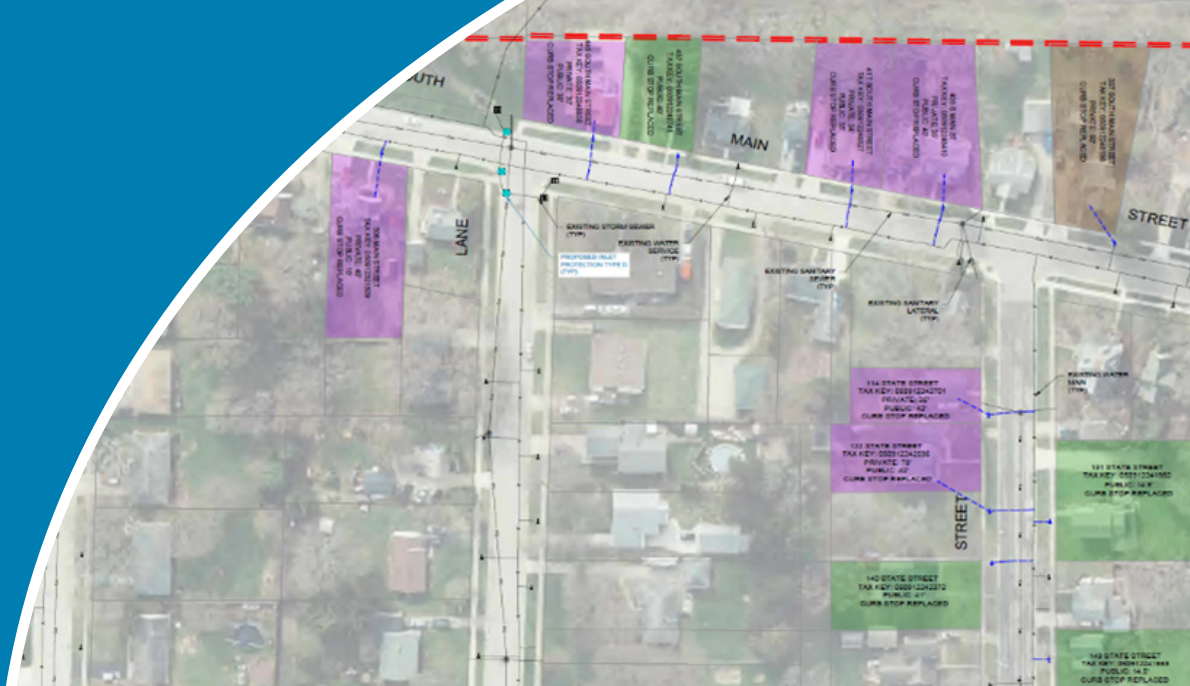
To streamline program management, Jacobs created a centralized electronic dashboard that tracks system participation, outreach activities, and inventory progress, giving WDNR and the project team real-time visibility into status and outstanding needs. To improve inventory accuracy and CWS engagement, we developed clear, structured outreach materials, including informational flyers, checklists, training materials, and FAQs.

In addition, Jacobs provides a call center hotline and email helpdesk for the program, with established procedures to log and resolve inquiries and track responses so that systems receive consistent, documented guidance.

Building on this foundation, we are now assisting WDNR in developing LCRI-focused tools and templates, including standardized forms and procedures for service line inventory and replacement, sampling, consumer notices, and support for other key aspects of the rule, along with continued technical assistance for water systems.

| WS Name | PWSID | TA Status | Correspondence Type             | Date of Correspondence | Method of Correspondence | Jacobs Contact | WS Contact | Notes from Correspondence |
|---------|-------|-----------|---------------------------------|------------------------|--------------------------|----------------|------------|---------------------------|
|         |       |           | Jacobs initial outreach attempt | 9/25/2025              | Email                    | Esther Chang   |            |                           |

# VILLAGE OF OREGON, WI



## SERVICES

- Design
- Bidding and Construction
- Grant Administration
- Outreach Coordination

## PROJECT TEAM

- Jason Lietha, P.E.
- Justin Klieve
- Kaley Simonis
- Andrew Burt, P.E.
- Tiffany Wagner, AEP

## REFERENCE

Lauren Striegl, P.E.  
Director of Public Works  
Village of Oregon  
608.501.9954  
lstriegl@vil.oregon.wi.us

## LEAD SERVICE LINE REPLACEMENT

In the first phase of this project, R/M provided coordination and support for design, bidding, and construction services to identify and conduct 86 lead service line replacements in the Village. Extensive public outreach was conducted and a program called “Get the Lead Out” was developed to illicit support from the community. Grant funding from the WDNR was awarded to help fund both private and public service line replacements.

The project’s second phase consisted of grant requirements for environmental screening, plan design, specification development, and permitting. The project was developed with open cut and trenchless installation methods.

R/M provided outreach coordination and support, design, bidding and construction services along with grant administration services for the SDWFL program for the Village. Asbuilt drawings were completed to document the final construction work, update Village GIS and submitted for grant requirements. Diligent documentation and weekly meetings throughout the construction process led to the project being completed under budget and ahead of schedule.



## SERVICES

- Design
- Inspection

## PROJECT TEAM

- Jason Lietha, P.E.

## REFERENCE

Matt Amundson  
City Administrator  
City of Columbus  
920.923.6058  
mamundson@columbus.wi.us

## LEAD SERVICE LINE REPLACEMENT

R/M coordinated with the Utility and WDNR to complete a multi-year lead service line replacement in areas where elevated lead test results were found. The project team focused on testing the original platted parts of the City with 4-inch water main and concrete paved streets. Properties were identified and each location was coordinated with the property owner to determine the service material in the home and at the street connection.

The first phase of the project included a design and specification completed by R/M to replace services in a piolet project that included 13 separate locations. Lead was found in both the public and private side, leading to required replacement at each location. R/M coordinated the bidding and construction services to complete the necessary repairs.

The project's second phase included identification and replacement of services as part of the SDWFL program. R/M utilized the phase 1 specifications for the standards to be used by the prequalified plumbers. R/M tracked the number and location of replacement and coordinated all replacement with street and sidewalk repairs. All contractor work was performed with open cut methods for construction.



## SERVICES

- Construction Review

## PROJECT TEAM

- Ryan Spackman, P.E.
- Justin Peterson

## REFERENCE

Curt Czarniecki, P.E.  
General Manager  
Kenosha Water Utility  
262.653.4306  
[kenoshawater@kenosha.org](mailto:kenoshawater@kenosha.org)

## LEAD SERVICE LINE REPLACEMENT

Our team partnered with CDM Smith to support the Kenosha Water Utility in an ambitious initiative to replace 800 lead service lines across the city within a single year. This highly visible project required extensive coordination with homeowners and strict adherence to regulatory requirements, as the work occurred directly in customers' front yards.

The primary challenge was the scale and pace of the project, combined with the need for meticulous documentation and compliance. The utility needed assurance that every installation met standards and that customer concerns were addressed promptly and professionally.

R/M provided on-the-ground construction review services, acting as the utility's eyes and ears throughout the process. Our team delivered thorough daily reports, ensured all regulatory compliance forms were accurate and submitted quickly, and maintained clear communication with both the utility and residents. This proactive approach minimized disruptions and built trust with the community.

The result was the successful replacement of all 800 lead service lines within the targeted timeframe, enhancing public health and safety while maintaining customer confidence. Our involvement allowed the utility to meet its aggressive schedule without compromising quality or compliance, ultimately reinforcing its reputation for reliability and care.

# PROJECT APPROACH

## PROJECT UNDERSTANDING

Our team brings **extensive experience in managing complex water infrastructure projects, including lead service line replacements**, and is prepared to complete the work outlined in the RFP. We understand the critical nature of this project and the importance of resident experience throughout implementation. We are committed to delivering comprehensive outreach and communication, efficient project management, and thorough construction review services to support successful implementation of the City's lead service line replacement program.

We understand that compliance with the Lead and Copper Rule Improvements (LCRI), as administered by the Wisconsin Department of Natural Resources (WDNR), is a central driver of this effort and have structured our approach to support regulatory approval, defensible documentation, and successful funding reimbursement.

*We understand that tracking and managing lead service line replacements is one of the most important components of this project.*

Developing and executing a robust outreach strategy to **ensure effective and proper communication with affected residents and property owners is critical to the success of this project**. R/M will provide the resources necessary to support this effort and continue the communication process already initiated by the City. R/M is uniquely positioned to understand their existing practices, and Jacobs is uniquely positioned to know the intricacies of the new outreach LCRI requirements.

We will manage service line replacement plan preparation and implementation, bidding, and construction phases to support **timely completion and compliance with requirements**. Familiarity with FAWU and prior lead service line replacement programs positions our team to understand that **tracking and managing each lead service line replacement is central to regulatory compliance, funding eligibility, and reimbursement documentation**.

R/M provides construction review services through qualified Construction Review Technicians and brings experience supporting similar replacement programs. Effective implementation requires sustained field coordination and documentation, and **our experience with prior LSL programs supports accurate record keeping, procurement compliance, and defensible reimbursement documentation**.

## ESTABLISH PLAN PARAMETERS

We will review the City's service line inspection records and existing GIS data to determine the criteria needed to supplement the replacement plan being developed by the City with assistance from the Jacobs Technical Assistance program. We will evaluate available funding opportunities, identify funding programs for which the City qualifies, and use available technical information to determine an annual lead service line replacement goal. This evaluation will consider Lead and Copper Rule Improvement requirements and existing funding limits.

Replacement prioritization criteria will be established consistent with LCRI requirements, including consideration of high-risk populations such as childcare facilities, schools, and sensitive populations, along with service line material verification confidence and coordination with planned infrastructure improvements.

*The plan will also include provisions for accelerated replacement schedules in the event of a lead action level exceedance, consistent with LCRI requirements.*

## DEVELOP REPLACEMENT PLAN

R/M will utilize the City's existing GIS data and inspection records to develop a plan that follows City Ordinance 98-59 and other City, State, and Federal guidance to replace approximately 500 lead service lines throughout the City of Fort Atkinson.

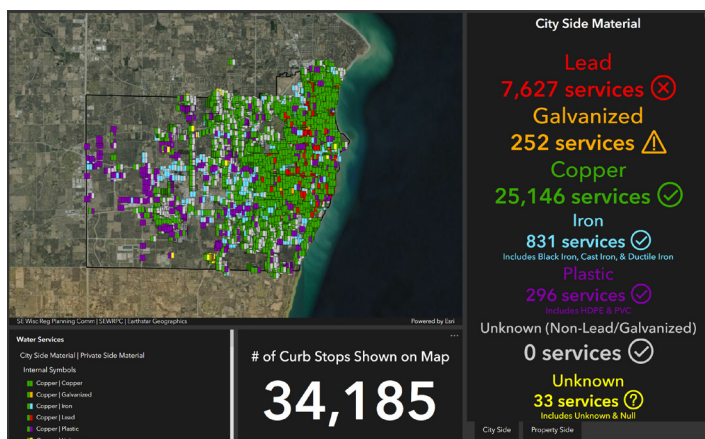
For each funding source, eligibility criteria, documentation requirements, and anticipated reimbursement milestones will be clearly identified to support efficient administration and compliance.

We will stay current with new requirements and funding opportunities and will revisit the replacement plan during Q1 of each year to ensure continued compliance and incorporation of new funding opportunities.

At a minimum, the team will prepare and submit a State Fiscal Year 2027 Safe Drinking Water Loan Program application by June 2026.

### DEVELOPING FUNDING PLAN

We will research funding options and, on behalf of the City, prepare and submit applications to qualifying programs. We will submit a Safe Drinking Water Loan Program application for State Fiscal Year 2027 and additional applications in subsequent years as necessary to provide funding for the replacement plan. Based on qualifying funding programs, R/M will develop a financial plan to supplement the replacement plan and support implementation of the program.



Example GIS App for Tracking LSL Removal

R/M has successfully secured and administered the Safe Drinking Water Loan Program for the following communities:

- Village of Mukwonago
- City of Antigo
- Racine Water Utility
- Village of Pewaukee
- City of Oregon
- City of Oconomowoc
- Village of North Fond du Lac
- Village of Kellnersville

### IMPLEMENTATION STRATEGY

Our team will work with the City to determine a timeline for implementation of the lead service line replacement plan. We will create a calendar identifying important dates to secure funding, establish construction timelines, and support timely completion of regulatory requirements.

The implementation strategy will include monitoring and evaluation mechanisms to track SDWLP-eligible costs, reimbursement status, and compliance documentation.

The final plan will include both program-wide and annual replacement schedule graphics.

### COMMUNICATIONS

R/M brings ready-to-deploy communication tools that accelerate outreach and reduce start-up effort for the City. We will leverage established communication templates and outreach materials developed through past and ongoing Lead Service Line Replacement programs.

These templates were created in direct collaboration with WDNr as the State’s technical assistance provider, ensuring alignment with regulatory expectations and proven best practices. We will immediately apply and tailor these materials for Fort Atkinson, allowing the City to communicate clearly, consistently, and efficiently with residents while incorporating public input during plan development, implementation, and ongoing annual updates.

The City’s existing outreach and communication practices will be reviewed, with recommended enhancements provided to ensure alignment with LCRI notification, customer education, and documentation requirements.

LCRI-required notifications, post-replacement flushing guidance, customer education materials, and tracking of filter or pitcher distribution will be incorporated into the communication approach.

### CONSTRUCTION BIDDING AND CONSTRUCTION ADMINISTRATION

Our team will provide construction bidding services including advertising official notices, preparing bid documents, publishing documents through QuestCDN, and conducting a virtual bid opening.

We will provide **full-time construction review services during active construction.** This will include holding a preconstruction meeting, assisting the

Contractor with required State and City permits, conducting weekly progress meetings to coordinate construction efforts, and assisting with scheduling of private-side lead service line replacements.

All bidding, construction administration, and documentation activities will be performed in compliance with WDNR and Safe Drinking Water Loan Program procurement, contracting, and reimbursement requirements, if authorized by the City.

Construction review services will include daily observation, preparation of record drawings, photographs, and daily notes documenting construction activities. Daily inspection reports will be made immediately available to City staff for record keeping and verification of compliance.

Construction administration will include preparation of monthly or as-needed pay applications, gathering and tracking state and federal requirements, managing change orders, performing a final walkthrough and preparing a punch list, and completing contract closeout. We will also assist with distribution and tracking of Utility-provided water pitchers to affected properties, as necessary.

## SUBCONSULTANTS

Jacobs Engineering will serve as a strategic subconsultant, providing program-level guidance and technical support throughout project implementation. Jacobs brings deep familiarity with the Wisconsin Department of Natural Resources and the Lead Service Line Replacement program, allowing them to interpret and apply program requirements with precision. As the current technical assistance provider to WDNR for the City of Fort Atkinson, Jacobs offers direct, practical experience that strengthens compliance and execution. Their ongoing role with WDNR and Fort Atkinson also creates the potential for select technical assistance services to be provided at no cost, adding value and efficiency to the overall project scope.

Our team is currently developing a Service Line Replacement Standard Operating Procedure on behalf of the DNR as part of the Service Line Replacement Plan. We have direct knowledge of compliant methods for both executing replacements, and documentation requirements/best practices to align with state expectations.

## FEE

Please see the included Level of Effort (LOE) for the proposed hours and billing rates associated with Tasks 1 through 5.

Year One includes development of the strategic plan, grant funding assistance, implementation strategy development, and project outreach and communication efforts. The estimated cost for Year One services is \$96,290.

In subsequent years, the level of effort is anticipated to be reduced, with plan updates requiring a smaller scope of services. The estimated annual cost for these services is \$41,766.

Design, bidding, and construction administration services are not included in this fee and are anticipated to be negotiated separately following contract award and completion of the planning effort.

# PROJECT TIMELINE

Assuming multiple phases of construction will be needed the timeline is as follows:

| TASK  | Dates                   | 2026 |     |     |     |     |     |     |     |     |     |     |     | 2027 |     |     |     |     |     |     |     |     |     |     |     | 2028 |     |     |     |     |     |     |  |  |
|---|-------------------------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|--|--|
|   |                         | Mar  | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar  | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar  | Apr | May | Jun | Jul | Aug | Sep |  |  |
| <b>Phase 1 (SFY27)</b>                                    |                         |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Project awarded by City                                   | March 17, 2026          | █    |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Project Kick-off meeting with City staff and project team | Beginning of April 2026 |      | █   |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Develop community outreach strategy                       | June-October 2026       |      |     |     | █   | █   | █   | █   | █   |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Prepare draft LSL replacement plan                        | June-October 2026       |      |     |     | █   | █   | █   | █   | █   |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Final research / criteria determined                      | May 2026, Annually      |      |     | █   |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Meeting with City staff to review CIP                     | May 2026, Annually      |      |     | █   |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Integrate LSL program with CIP                            | Mid May 2026            |      |     | █   |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| SDWL SFY27 application submitted to DNR                   | June 30, 2026           |      |     |     | █   |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| SDWL SFY27 funding award announced                        | November 2026           |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Plan design finalized                                     | January 2027            |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Bidding documents finalized                               | February 2027           |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Bidding   | February–March 2027     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Bid award   | March 2027              |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Permitting  | March–April 2027        |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Construction  | June–September 2027     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Finalize LSL replacement plan                             | April–November 2027     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Submit LSL replacement plan to WDNR                       | November 1, 2027        |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| <b>Phase 2 (SFY28)</b>                                    |                         |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| SDWL ITA SFY28 submitted to DNR                           | October 31, 2026        |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| SDWL SFY28 application submitted to DNR                   | June 30, 2027           |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| SDWL SFY28 funding award announced                        | November 2027           |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Plan design finalized                                     | January 2028            |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Bidding documents finalized                               | February 2028           |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Bidding   | February–March 2028     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Bid award   | March 2028              |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Permitting  | March–April 2028        |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |
| Construction  | June–September 2028     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |  |  |

If more than 2 phases are required, timeline will largely follow the above for the years 2029 and 2030. ITA's are to be submitted to DNR by October 31 of the year prior to the SDWLP application. SDWLP application to be submitted to DNR by June 30 of the year prior to construction.

LSL plan and CIP will be reviewed yearly in September (after construction is completed) to layout additional phases, determine funding sources, and deadlines. R/M will review funding sources throughout the year to determine if the City of Fort Atkinson is eligible for funding from these programs in addition to the DNR's SDWLP. R/M will meet with City staff on a yearly basis to discuss additional phases, and status of LSL replacement plan.

# RISK MANAGEMENT

## **DNR FUNDING LIMITS:**

Increased interest in the DNR SDWLP from other municipalities throughout the state will likely pose a threat to available funding limits. Since the City of Fort Atkinson is one of very few municipalities in the State currently looking to address LSL replacement, we will leverage our timeline and implementation strategy to aggressively apply for as much funding as possible within the City's financial capacity. As more municipalities begin to apply for SDWLP for LSL replacement, we will identify other funding strategies to help the City still reach their replacement goals regardless of funding through the SDWLP.

## **DNR PERMITTING REVIEW DELAYS:**

Any changes to horizontal or vertical alignment of public watermain needs to be reviewed by DNR. If the project only involves replacement of the LSL, DNR permitting will not be required. Our team will keep this in mind as we develop the replacement plan and how it coincides with the City's CIP for infrastructure replacement. DNR water permitting historically can take several months depending on the reviewer and how complicated the plans are. Our team will develop the replacement plan to include time for permitting.

## **PUBLIC ENGAGEMENT AND OUTREACH:**

As the FAWU is aware, public engagement is difficult to implement. Through our team's extensive experience with LSL programs in other municipalities, and communication templates developed by Jacob's through the Technical Assistance program, we will provide the City with the tools needed to continue the public engagement and outreach process that the FAWU has already developed.

## **FUTURE REGULATION CHANGES:**

Through R/M's partnership with Jacobs, our team will be on the ground level as any changes are implemented. Jacob's involvement with the Technical Assistance Program will give our team early access to state regulations. We will leverage this information to update the City's LSL plan to include any future regulation changes as we are notified of them providing the City a step up in the funding competition.

# FEE PROPOSAL YEAR ONE

| PROFESSIONAL FEE ESTIMATE   | CLIENT: CITY OF FORT ATKINSON |          |          |          |               |          |          |                    |          |          | PROJECT: LSL PROGRAM  |          |          |                     |          |          |          |       |              |                 |
|---|-------------------------------|----------|----------|----------|---------------|----------|----------|--------------------|----------|----------|-----------------------|----------|----------|---------------------|----------|----------|----------|-------|--------------|-----------------|
| PREPARED BY: SEB<br>SCOPE OF SERVICES   | 02-Mar-2026                   |          |          |          |               |          |          |                    |          |          | CATEGORY OF PERSONNEL |          |          |                     |          |          |          |       | TASK ORDER:  |                 |
|   | \$240.00                      | \$217.00 | \$191.00 | \$205.00 | \$195.00      | \$169.00 | \$159.00 | \$165.00           | \$160.00 | \$141.00 | \$130.00              | \$100.00 | \$180.00 | \$164.00            | \$119.00 | \$135.00 | \$119.00 | TOTAL | TOTAL        |                 |
|   | E7                            | E6       | CITY     | E5       | E4            | E3       | E2       | JACOBS             | SENIOR   | T2       | T1                    | AA       | PLS      | CC                  | SURVEY   | SENIOR   | CRT      | CRT2  | HRS          | LABOR           |
|   | PM                            | PM       | ENG      | ENG      | ENG           | ENG      | ENG      | JACOBS             | TECH     | TECH     | TECH                  | ASSIST   | SUR      | Crew Chief          | TECH     | CRT      | CRT2     |       |              | COST            |
| <b>DESIGN FEES</b>  |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | <b>496</b>   | <b>\$96,290</b> |
| <b>TASK 1 - ESTABLISH PLAN PARAMETERS</b>   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       |              | <b>\$26,175</b> |
| Meet with City - Confirm LSL replacement locations  |                               |          |          |          | 6             |          |          |                    | 1        |          |                       |          |          |                     |          |          |          |       | 7            | \$1,335.00      |
| Review data collected by City through investigation, resident submittals, and inspections |                               |          |          |          | 40            |          |          |                    | 2        |          |                       |          |          |                     |          |          |          |       | 42           | \$8,130.00      |
| Determine plan to do any final confirmation and develop final list of properties          |                               |          |          |          | 8             |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 8            | \$1,560.00      |
| Work with City to complete final confirmation of unknowns                                 |                               |          |          |          | 40            |          |          |                    | 2        |          |                       |          |          |                     |          |          |          |       | 42           | \$8,130.00      |
| Meet with City - Confirm final LSL replacement locations                                  |                               |          |          |          | 4             |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 4            | \$780.00        |
| Update GIS with any information found through supplemental investigation                  |                               |          |          |          | 16            |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 16           | \$3,120.00      |
| Establish prioritization criteria (in consultation with Jacobs through TA program)        |                               |          |          |          | 8             |          |          |                    | 0        |          |                       |          |          |                     |          |          |          |       | 8            | \$1,560.00      |
| Identify LSL replacement goal rate  |                               |          |          |          | 8             |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 8            | \$1,560.00      |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
| <i>Other project specific items - elaborate</i>   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
| <b>TOTAL HOURS</b>  | 0                             | 0        | 0        | 0        | 130           | 0        | 0        | 5                  | 0        | 0        | 0                     | 0        | 0        | 0                   | 0        | 0        | 0        | 0     | 135          |                 |
| <b>TASK 2 - DEVELOP REPLACEMENT PLAN</b>  |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       |              | <b>\$11,700</b> |
| Meet with City staff to review CIP and funding resources                                  |                               |          |          |          | 8             |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 8            | \$1,560.00      |
| Integrate LSL program with CIP  |                               |          |          |          | 20            |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 20           | \$3,900.00      |
| Create tracking system  |                               |          |          |          | 32            |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 32           | \$6,240.00      |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
| <i>Other project specific items - elaborate</i>   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
| <b>TOTAL HOURS</b>  | 0                             | 0        | 0        | 0        | 60            | 0        | 0        | 0                  | 0        | 0        | 0                     | 0        | 0        | 0                   | 0        | 0        | 0        | 0     | 60           |                 |
| <b>TASK 3 - DEVELOPING FUNDING PLAN</b>   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       |              | <b>\$34,830</b> |
| Funding research (in consultation with Jacobs through TA program)                         |                               |          |          |          | 8             |          |          | 0                  |          |          |                       |          |          |                     |          |          |          |       | 8            | \$1,560.00      |
| Prepare SDWLP application   | 8                             |          |          |          | 60            |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 68           | \$13,620.00     |
| Prepare ITA   | 4                             |          |          |          | 20            |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 24           | \$4,860.00      |
| Prepare applications to other funding programs City is eligible for                       | 8                             |          |          |          | 60            |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 68           | \$13,620.00     |
| Discussion with City to determine which funding programs to go after                      |                               |          |          |          | 6             |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 6            | \$1,170.00      |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
| <i>Other project specific items - elaborate</i>   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
| <b>TOTAL HOURS</b>  | 20                            | 0        | 0        | 0        | 154           | 0        | 0        | 0                  | 0        | 0        | 0                     | 0        | 0        | 0                   | 0        | 0        | 0        | 0     | 174          |                 |
| <b>TASK 4 - IMPLEMENTATION STRATEGY</b>   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       |              | <b>\$13,005</b> |
| Create calendar of important deadlines, construction timeline, etc.                       |                               |          |          |          | 25            |          |          | 2                  |          |          |                       |          |          |                     |          |          |          |       | 27           | \$5,205.00      |
| Final LSL plan report   |                               |          |          |          | 35            |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 35           | \$6,825.00      |
| Regulatory Consultation ((in consultation with Jacobs through TA program))                |                               |          |          |          | 5             |          |          | 0                  |          |          |                       |          |          |                     |          |          |          |       | 5            | \$975.00        |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
| <i>Other project specific items - elaborate</i>   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
| <b>TOTAL HOURS</b>  | 0                             | 0        | 0        | 0        | 65            | 0        | 0        | 2                  | 0        | 0        | 0                     | 0        | 0        | 0                   | 0        | 0        | 0        | 0     | 67           |                 |
| <b>TASK 5 - COMMUNICATIONS</b>  |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       |              | <b>\$10,384</b> |
| Review City's existing communication and outreach   |                               |          |          |          | 2             | 10       |          |                    |          |          |                       |          |          |                     |          |          |          |       | 12           | \$2,080.00      |
| Develop Communication Strategy  |                               |          |          |          | 8             | 36       |          | 4                  |          |          |                       |          |          |                     |          |          |          |       | 48           | \$8,304.00      |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
|   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
| <i>Other project specific items - elaborate</i>   |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | 0            | \$0.00          |
| <b>TOTAL HOURS</b>  | 0                             | 0        | 0        | 0        | 10            | 46       | 0        | 4                  | 0        | 0        | 0                     | 0        | 0        | 0                   | 0        | 0        | 0        | 0     | 60           |                 |
| <b>DESIGN REIMBURSABLE</b>  |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       | <b>\$196</b> |                 |
| HALF SIZE PLAN REPRODUCTION (BASED ON 11"X17" SHEET)                                      | SETS                          |          |          |          | 30 SHEETS/SET |          |          | 39 SQUARE FEET/SET |          |          |                       |          |          | 0.5 PER SQUARE FOOT |          |          |          |       |              | \$0.00          |
| FULL SIZE PLAN REPRODUCTION (BASED ON 22"X34" SHEET)                                      | SETS                          |          |          |          | SHEETS/SET    |          |          | 0 SQUARE FEET/SET  |          |          |                       |          |          | 0.5 PER SQUARE FOOT |          |          |          |       |              | \$0.00          |
| MILEAGE - ENGINEERS   | 280 MILEAGE                   |          |          |          |               |          |          |                    |          |          |                       |          |          | 0.7 PER MILE        |          |          |          |       |              | \$196.00        |
| MILEAGE - CONSTRUCTION REVIEW TECHNICIANS   | MILEAGE                       |          |          |          |               |          |          |                    |          |          |                       |          |          | 0.74 PER MILE       |          |          |          |       |              | \$0.00          |
| MILEAGE - SURVEY  | MILEAGE                       |          |          |          |               |          |          |                    |          |          |                       |          |          | 0.91 PER MILE       |          |          |          |       |              | \$0.00          |
| EQUIPMENT   |                               |          |          |          |               |          |          | DAYS               |          |          |                       |          |          | 140 PER DAY         |          |          |          |       |              | \$0.00          |
| SOIL BORINGS SUBCONSULTANT  |                               |          |          |          |               |          |          |                    |          |          |                       |          |          |                     |          |          |          |       |              | \$0.00          |

# FEE PROPOSAL SUBSEQUENT YEARS

| PROFESSIONAL FEE ESTIMATE  | CLIENT: CITY OF FORT ATKINSON | PROJECT: LSL PROGRAM |                       |          |          |               |          |          |                    |          |          |          |          |          | TASK ORDER:         |            |          |          |          |            |                 |
|--|-------------------------------|----------------------|-----------------------|----------|----------|---------------|----------|----------|--------------------|----------|----------|----------|----------|----------|---------------------|------------|----------|----------|----------|------------|-----------------|
| PREPARED BY: SEB   | 02-Mar-2026                   |                      | CATEGORY OF PERSONNEL |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          |            |                 |
| SCOPE OF SERVICES  |                               |                      | \$240.00              | \$217.00 | \$191.00 | \$205.00      | \$195.00 | \$169.00 | \$159.00           | \$165.00 | \$160.00 | \$141.00 | \$130.00 | \$100.00 | \$180.00            | \$164.00   | \$119.00 | \$135.00 | \$119.00 | TOTAL      | TOTAL           |
|  |                               |                      | E7                    | E6       | CITY     | E5            | E4       | E3       | E2                 |          | SENIOR   | T2       | T1       | AA       | PLS                 | CC         | SURVEY   | SENIOR   |          | LABOR      |                 |
|  |                               |                      | PM                    | PM       | ENG      | ENG           | ENG      | ENG      | ENG                | JACOBS   | TECH     | TECH     | TECH     | ASSIST   | SUR                 | Crew Chief | TECH     | CRT      | CRT2     | HRS        | COST            |
| <b>DESIGN FEES</b>   |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | <b>212</b> | <b>\$41,766</b> |
| <b>TASK 2 - DEVELOP REPLACEMENT PLAN</b>                             |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          |            | <b>\$1,980</b>  |
| Yearly Updates to integrated CIP/LSL Plan                            |                               |                      | 2                     |          |          | 4             |          |          | 2                  |          |          |          |          |          |                     |            |          |          |          | 8          | \$1,590.00      |
| Meet with City yearly to discuss updates to CIP                      |                               |                      |                       |          |          | 2             |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 2          | \$390.00        |
|  |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
|  |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
|  |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
| <i>Other project specific items - elaborate</i>                      |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
| <b>TOTAL HOURS</b>   |                               |                      | 2                     | 0        | 0        | 0             | 6        | 0        | 0                  | 2        | 0        | 0        | 0        | 0        | 0                   | 0          | 0        | 0        | 0        | 10         |                 |
| <b>TASK 3 - DEVELOPING FUNDING PLAN</b>                              |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          |            | <b>\$35,490</b> |
| Funding research   |                               |                      |                       |          |          | 8             |          |          | 2                  |          |          |          |          |          |                     |            |          |          |          | 10         | \$1,890.00      |
| Prepare SDWLP application  |                               |                      | 8                     |          |          | 60            |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 68         | \$13,620.00     |
| Prepare ITA  |                               |                      | 4                     |          |          | 20            |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 24         | \$4,860.00      |
| Prepare applications to other funding programs City is eligible for  |                               |                      | 8                     |          |          | 60            |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 68         | \$13,620.00     |
| Discussion with City to determine which funding programs to go after |                               |                      |                       |          |          | 6             |          |          | 2                  |          |          |          |          |          |                     |            |          |          |          | 8          | \$1,500.00      |
|  |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
|  |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
| <i>Other project specific items - elaborate</i>                      |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
| <b>TOTAL HOURS</b>   |                               |                      | 20                    | 0        | 0        | 0             | 154      | 0        | 0                  | 4        | 0        | 0        | 0        | 0        | 0                   | 0          | 0        | 0        | 0        | 178        |                 |
| <b>TASK 5 - COMMUNICATIONS</b>                                       |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          |            | <b>\$4,100</b>  |
| Update Communication Strategy  |                               |                      |                       |          |          | 2             | 20       |          | 2                  |          |          |          |          |          |                     |            |          |          |          | 24         | \$4,100.00      |
|  |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
|  |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
|  |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
|  |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
|  |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
| <i>Other project specific items - elaborate</i>                      |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          | 0          | \$0.00          |
| <b>TOTAL HOURS</b>   |                               |                      | 0                     | 0        | 0        | 0             | 2        | 20       | 0                  | 2        | 0        | 0        | 0        | 0        | 0                   | 0          | 0        | 0        | 0        | 24         |                 |
| <b>DESIGN REIMBURSABLE</b>   |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          |            | <b>\$196</b>    |
| HALF SIZE PLAN REPRODUCTION (BASED ON 11"X17" SHEET)                 |                               |                      | SETS                  |          |          | 30 SHEETS/SET |          |          | 39 SQUARE FEET/SET |          |          |          |          |          | 0.5 PER SQUARE FOOT |            |          |          |          |            | \$0.00          |
| FULL SIZE PLAN REPRODUCTION (BASED ON 22"X34" SHEET)                 |                               |                      | SETS                  |          |          | SHEETS/SET    |          |          | 0 SQUARE FEET/SET  |          |          |          |          |          | 0.5 PER SQUARE FOOT |            |          |          |          |            | \$0.00          |
| MILEAGE - ENGINEERS  |                               |                      | 280 MILEAGE           |          |          |               |          |          |                    |          |          |          |          |          | 0.7 PER MILE        |            |          |          |          |            | \$196.00        |
| MILEAGE - CONSTRUCTION REVIEW TECHNICIANS                            |                               |                      | MILEAGE               |          |          |               |          |          |                    |          |          |          |          |          | 0.74 PER MILE       |            |          |          |          |            | \$0.00          |
| MILEAGE - SURVEY   |                               |                      | MILEAGE               |          |          |               |          |          |                    |          |          |          |          |          | 0.91 PER MILE       |            |          |          |          |            | \$0.00          |
| EQUIPMENT  |                               |                      |                       |          |          |               |          |          | DAYS               |          |          |          |          |          | 140 PER DAY         |            |          |          |          |            | \$0.00          |
| SOIL BORINGS SUBCONSULTANT   |                               |                      |                       |          |          |               |          |          |                    |          |          |          |          |          |                     |            |          |          |          |            | \$0.00          |



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Ben Dayton, Director of Parks and Recreation

**RE:** Review and possible action related to the purchase of a 2026 F-450 Flatbed Truck with Dump Body (Dayton, Director of Parks and Recreation)

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### BACKGROUND

The Parks and Recreation Department relies on a single dump-style truck for all heavy-duty hauling. This vehicle is essential for transporting materials such as dirt, gravel, and concrete debris, as well as hauling bulk materials throughout the parks system.

The proposed 2026 Ford F-450 will replace the current 1999 Ford F-350 flat bed. Upgrading to the F-450 reduces the risk of overloading, improves operator safety, and increases versatility for potential cross-departmental use. The specifications align with those of the Department of Public Works Operations fleet, allowing the Parks unit to function as a temporary vehicle if another department's vehicle is out of service.

Funding for its replacement was approved in the 2026 Capital Improvement Plan through levy dollars outlined in Section R, Page 207.

### DISCUSSION

Staff obtained competitive proposals from Griffin Ford (Fort Atkinson) and Ewald Automotive Group (Hartford). Both vendors contracted with Madison Truck Equipment for the dump body and installation.

- **Ewald Ford:** \$79,604.00
- **Griffin Ford:** \$79,554.50

The vehicle includes a snowplow prep package and will use the repurposed plow mount from Truck 93, which is scheduled for replacement in the 2027 CIP.

### FINANCIAL ANALYSIS

Griffin Ford has offered a guaranteed \$1,000 trade-in value for the 1999 F-350, resulting in a

net project cost of **\$78,554.50**. Of this amount, **\$70,000** will be funded through the general levy allocation, with the remaining **\$8,554.50** covered by interest earned in Fund 16 (capital improvements fund).

**RECOMMENDATION**

Staff recommends that the City Council authorize the purchase of a 2026 Ford F-450 flatbed truck with a dump body installed by Madison Truck Equipment, from Griffin Ford, in an amount not to exceed \$78,554.50, including a guaranteed \$1,000 trade-in for the existing 1999 F-350 flatbed truck.

**ATTACHMENTS**

- 1. PARKS- EWALD Quote- F450 Dump Body- 26 CIP
- 2. Parks and Rec-Truck Inventory & Replacement Schedule 2.25.26
- 3. PARKS- Griffin Ford Quote- F450 Dump Body- 26 CIP



# Ewald Automotive Group

Chrissy Gensch | 262-673-9400 | [chrissy.gensch@ewaldauto.com](mailto:chrissy.gensch@ewaldauto.com)

## City of Fort Atkinson

Prepared For: Ben Dayton

920-397-9910

[bdayton@fortatkinsonwi.gov](mailto:bdayton@fortatkinsonwi.gov)

Vehicle: [Fleet] 2026 Ford Super Duty F-450 DRW (F4H) XL 4WD Reg Cab 169" WB 84" CA





# Ewald Automotive Group

Chrissy Gensch | 262-673-9400 | chrissy.gensch@ewaldauto.com

Vehicle: [Fleet] 2026 Ford Super Duty F-450 DRW (F4H) XL 4WD Reg Cab 169" WB 84" CA (  Complete )

## Quote Worksheet

|                                      | <b>MSRP</b>         |
|--------------------------------------|---------------------|
| Base Price                           | \$59,445.00         |
| Dest Charge                          | \$2,595.00          |
| Total Options                        | \$25,661.00         |
| <b>Subtotal</b>                      | <b>\$87,701.00</b>  |
| <b>Subtotal Pre-Tax Adjustments</b>  | <b>\$0.00</b>       |
| Less Customer Discount               | (\$8,097.00)        |
| <b>Subtotal Discount</b>             | <b>(\$8,097.00)</b> |
| Trade-In                             | \$0.00              |
| <b>Subtotal Trade-In</b>             | <b>\$0.00</b>       |
| <b>Taxable Price</b>                 | <b>\$79,604.00</b>  |
| Sales Tax                            | \$0.00              |
| <b>Subtotal Taxes</b>                | <b>\$0.00</b>       |
| <b>Subtotal Post-Tax Adjustments</b> | <b>\$0.00</b>       |
| <b>Total Sales Price</b>             | <b>\$79,604.00</b>  |

### Comments:

2026 Ford F450 4WD Reg Cab 84" CA to the specifications as detailed. Registration fee are not included. Due to current market, lead time can not be guaranteed.

\_\_\_\_\_  
Dealer Signature / Date

\_\_\_\_\_  
Customer Signature / Date

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Data Version: 27475. Data Updated: Jan 11, 2026 6:45:00 PM PST.



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Vehicle: [Fleet] 2026 Ford Super Duty F-450 DRW (F4H) XL 4WD Reg Cab 169" WB 84" CA ( Complete )

## Standard Equipment

### Mechanical

Engine: 7.3L 2V DEVCT NA PFI V8 Gas (STD)

Transmission: TorqShift 10-Speed Automatic -inc: SelectShift, selectable drive modes: normal, tow/haul, eco, slippery roads and off-road and transmission power take-off provision (STD)

4.88 Axle Ratio (STD)

50-State Emissions System

Transmission w/Driver Selectable Mode and Oil Cooler

Electronic Transfer Case

Part-Time Four-Wheel Drive

68-Amp/Hr 750CCA Maintenance-Free Battery w/Run Down Protection

190 Amp Alternator

190 Amp Alternator

Towing Equipment -inc: Trailer Sway Control

Trailer Wiring Harness

9430# Maximum Payload

GVWR: 16,500 lb Payload Package

HD Gas-Pressurized Shock Absorbers

Front And Rear Anti-Roll Bars

Firm Suspension

Hydraulic Power-Assist Steering

40 Gal. Fuel Tank

Single Stainless Steel Exhaust

Dual Rear Wheels

Auto Locking Hubs

Front Suspension w/Coil Springs

Solid Axle Rear Suspension w/Leaf Springs

4-Wheel Disc Brakes w/4-Wheel ABS, Front And Rear Vented Discs, Brake Assist and Hill Hold Control

Upfitter Switches

### Exterior

Wheels: 19.5" x 6" Argent Painted Steel -inc: Hub covers/center ornaments not included

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Vehicle: [Fleet] 2026 Ford Super Duty F-450 DRW (F4H) XL 4WD Reg Cab 169" WB 84" CA (  Complete )

## Exterior

- Tires: 225/70Rx19.5G BSW A/P (STD)
- Black Front Bumper w/Black Rub Strip/Fascia Accent and 2 Tow Hooks
- Black Fender Flares
- Black Side Windows Trim and Black Front Windshield Trim
- Black Door Handles
- Black Power Heated Side Mirrors w/Convex Spotter, Manual Folding and Turn Signal Indicator
- Manual Extendable Trailer Style Mirrors
- Fixed Rear Window
- Light Tinted Glass
- Variable Intermittent Wipers
- Aluminum Panels
- Front Splash Guards
- Black Grille
- Autolamp Auto On/Off Reflector Halogen Daytime Running Lights Preference Setting Headlamps w/Delay-Off
- Cab Clearance Lights
- Perimeter/Approach Lights

## Entertainment

- Radio w/Seek-Scan, Clock and Speed Compensated Volume Control
- Radio: AM/FM Stereo w/MP3 Player -inc: 4 speakers
- 4 Speakers
- Fixed Antenna
- SYNC 4 -inc: 8" center display, wireless phone connection, cloud connected, AppLink w/app catalog, 911 Assist, Apple CarPlay and Android Auto compatibility and digital owner's manual
- Wireless Phone Connectivity
- 2 LCD Monitors In The Front

## Interior

- 4-Way Driver Seat -inc: Manual Recline and Fore/Aft Movement
- 4-Way Passenger Seat -inc: Manual Recline and Fore/Aft Movement
- Manual Tilt/Telescoping Steering Column
- Gauges -inc: Speedometer, Odometer, Oil Pressure, Engine Coolant Temp, Tachometer, Transmission Fluid Temp, Engine Hour Meter, Trip Odometer and Trip Computer

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Vehicle: [Fleet] 2026 Ford Super Duty F-450 DRW (F4H) XL 4WD Reg Cab 169" WB 84" CA (  Complete )

## Interior

- Front Cupholder
- Compass
- Remote Keyless Entry w/Integrated Key Transmitter, Illuminated Entry and Panic Button
- Cruise Control w/Steering Wheel Controls
- Manual Air Conditioning
- Locking Glove Box
- Interior Trim -inc: Chrome Interior Accents
- Full Cloth Headliner
- Urethane Gear Shifter Material
- HD Vinyl 40/20/40 Split Bench Seat -inc: center armrest, cupholder, storage and driver's side manual lumbar
- Day-Night Rearview Mirror
- Passenger Visor Vanity Mirror
- Full Overhead Console w/Storage and 2 12V DC Power Outlets
- Front Map Lights
- Fade-To-Off Interior Lighting
- Full Vinyl/Rubber Floor Covering
- Smart Device Remote Engine Start
- Smart Device Integration
- Ford Connectivity Package (1-Year Included) -inc: unlimited Wi-Fi hotspot, Included for 1-year from warranty start date, Requires activation via Ford app w/credit card authorization; customer may cancel at any time, Evolving technology/cellular networks/vehicle capability may limit functionality and prevent operation of connected features, Ford may temporarily slow data speeds if such data usage reaches or exceeds 50GB within a billing cycle or due to network limitations, If a customer uses more than 50% of their data usage in a roaming country during a 60-day period, Ford may remove or limit the customer's data plan
- Instrument Panel Covered Bin and Dashboard Storage
- Power 1st Row Windows w/Driver And Passenger 1-Touch Up/Down
- Delayed Accessory Power
- Power Door Locks w/Autolock Feature
- Driver Information Center
- Trip Computer
- Outside Temp Gauge
- Digital/Analog Appearance

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Vehicle: [Fleet] 2026 Ford Super Duty F-450 DRW (F4H) XL 4WD Reg Cab 169" WB 84" CA (✔ Complete)

## Interior

- Seats w/Vinyl Back Material
- Manual Adjustable Front Head Restraints
- Front Center Armrest w/Storage
- Perimeter Alarm
- Securilock Anti-Theft Ignition (pats) Immobilizer
- 2 12V DC Power Outlets
- Air Filtration

## Safety-Mechanical

- Driveline Traction Control

## Safety-Exterior

- Side Impact Beams

## Safety-Interior

- Dual Stage Driver And Passenger Seat-Mounted Side Airbags
- Emergency Sos Capability
- Pre-Collision Assist with Automatic Emergency Braking (AEB)
- Lane Departure Warning
- Collision Mitigation-Front
- Tire Specific Low Tire Pressure Warning
- Dual Stage Driver And Passenger Front Airbags w/Passenger Off Switch
- Safety Canopy System Curtain 1st Row Airbags
- Outboard Front Lap And Shoulder Safety Belts -inc: Height Adjusters

## WARRANTY

- Basic Years: 3
- Basic Miles/km: 36,000
- Drivetrain Years: 5
- Drivetrain Miles/km: 60,000
- Corrosion Years: 5
- Corrosion Miles/km: Unlimited
- Roadside Assistance Years: 5
- Roadside Assistance Miles/km: 60,000

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Vehicle: [Fleet] 2026 Ford Super Duty F-450 DRW (F4H) XL 4WD Reg Cab 169" WB 84" CA ( Complete )

## Selected Model and Options

| MODEL |  |             |
|-------|--|-------------|
| CODE  | MODEL  | MSRP        |
| F4H   | 2026 Ford Super Duty F-450 DRW XL 4WD Reg Cab 169" WB 84" CA | \$59,445.00 |

| COLORS |              |
|--------|--------------|
| CODE   | DESCRIPTION  |
| Z1     | Oxford White |

| ENGINE |   |        |
|--------|---|--------|
| CODE   | DESCRIPTION                               | MSRP   |
| 99N    | Engine: 7.3L 2V DEVCT NA PFI V8 Gas (STD) | \$0.00 |

| TRANSMISSION |  |        |
|--------------|--|--------|
| CODE         | DESCRIPTION  | MSRP   |
| 44G          | Transmission: TorqShift 10-Speed Automatic -inc: SelectShift, selectable drive modes: normal, tow/haul, eco, slippery roads and off-road and transmission power take-off provision (STD) | \$0.00 |

| OPTION PACKAGE |                 |        |
|----------------|-----------------|--------|
| CODE           | DESCRIPTION     | MSRP   |
| 650A           | Order Code 650A | \$0.00 |

| AXLE RATIO |                                |          |
|------------|--------------------------------|----------|
| CODE       | DESCRIPTION                    | MSRP     |
| X8L        | Limited Slip w/4.88 Axle Ratio | \$395.00 |

| TIRES |  |          |
|-------|--|----------|
| CODE  | DESCRIPTION  | MSRP     |
| TGK   | Tires: 225/70Rx19.5G BSW Traction (TGK) -inc: 4 traction tires on the rear and 2 traction tires on the front, Not recommended for over the road applications; could incur irregular front tire wear and/or NVH | \$215.00 |

| PRIMARY PAINT |              |        |
|---------------|--------------|--------|
| CODE          | DESCRIPTION  | MSRP   |
| Z1            | Oxford White | \$0.00 |

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Vehicle: [Fleet] 2026 Ford Super Duty F-450 DRW (F4H) XL 4WD Reg Cab 169" WB 84" CA (  Complete )

## SEAT TYPE

| CODE | DESCRIPTION  | MSRP   |
|------|--|--------|
| AS   | Medium Dark Slate, HD Vinyl 40/20/40 Split Bench Seat -inc: center armrest, cupholder, storage and driver's side manual lumbar | \$0.00 |

## ADDITIONAL EQUIPMENT - PACKAGE

| CODE | DESCRIPTION   | MSRP     |
|------|---|----------|
| 96V  | XL Chrome Package -inc: Halogen Fog Lamps, Bright Grille, Remote Start, Chrome Front Bumper | \$425.00 |

## ADDITIONAL EQUIPMENT - MECHANICAL

| CODE | DESCRIPTION  | MSRP     |
|------|--|----------|
| 473  | Snow Plow Prep Package -inc: pre-selected springs (see order guide supplemental reference for springs/FGAWR of specific vehicle configurations), Note 1: Restrictions apply; see supplemental reference or body builders layout book for details, Note 2: Also allows for the attachment of a winch, Note 3: Highly recommended to add (86M) dual battery on 7.3L gas engine, Adding (67B) 410 amp dual alternators for diesel engine is highly recommended for max power output | \$350.00 |
| 67A  | 350 Amp Dual Alternators -inc: 190 Amp + 160 Amp   | \$0.00   |
| 86M  | Dual 68 AH/65 AGM Battery  | Inc.     |

## CUSTOM EQUIPMENT

| CODE | DESCRIPTION  | MSRP        |
|------|--|-------------|
| DI-1 | MADISON TRUCK TO INSTALL 11' CRYSOLEET STAINLESS STEEL DIMP BODY PER ATTACHED SPECIFICATIONS | \$24,066.00 |

|                      |                    |
|----------------------|--------------------|
| <b>Options Total</b> | <b>\$25,661.00</b> |
|----------------------|--------------------|

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Vehicle: [Fleet] 2026 Ford Super Duty F-450 DRW (F4H) XL 4WD Reg Cab 169" WB 84" CA ( Complete )

## Price Summary

### PRICE SUMMARY

|                    | <b>MSRP</b>        |
|--------------------|--------------------|
| Base Price         | \$59,445.00        |
| Total Options      | \$25,661.00        |
| Vehicle Subtotal   | \$85,106.00        |
| Destination Charge | \$2,595.00         |
| <b>Grand Total</b> | <b>\$87,701.00</b> |

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Parks Division- Truck Inventory and Replacement Schedule

| 2025     | Vehicle and Options                           | Truck No. | Division               | Year     | Scheduled  |
|----------|---|-----------|------------------------|----------|------------|
|          | Ford F-150 Tommy Gate- White Water Truck      | 26        | PT-City Scape          | 8/1/2008 |            |
|          | 2008 Ford F-250 Tommy Gate- Plow              | 90        | PT-Parks Maint         | 8/1/2008 | 2018 F250  |
|          | 2003 Ford F-150 Tommy Gate                    | 91        | PT-Parks Maint/City    | 5/3/2003 | 2012 F 250 |
|          | 2018 Ford F250 Tommy Gate- Plow               | 93        | FT-Parks- Transport    | 1/1/2018 | 2028       |
|          | 2012 Ford F-250 Tommy Gate- Plow              | 94        | FT-Parks- Transport    | 7/1/2012 | 2027       |
|          | 1999 Ford F-350 Flatbed- Plow                 | 95        | Parks- Flatbed         | 1/1/1999 | 2026       |
|          | 2025 Ford F-150- Tommy Gate - Aluminum        | 96        | FT-Parks- Transport    | 1/1/2025 | 2045       |
|          | 2023 Ford F-150 Tommy Gate                    | 97        | FT-Parks- Transport    | 1/1/2023 | 2043       |
|          | 2022 Ford F350 Tommy Gate- Polw               | 98        | FT-Parks- Transport    | 1/1/2022 | 2042       |
|          | Van   | 18        | PT-City Scape-Watering |          | 2042       |
|          |   |           |                        |          |            |
| 2026     | Vehicle and Options                           | Truck No. | Division               | Year     | Scheduled  |
|          | 2008 Ford F-150 Tommy Gate- White Water Truck | 26        | PT-City Scape          | 8/1/2008 |            |
|          | 2018 Ford F250 Tommy Gate- Plow               | 90        | PT-Parks Maint         | 8/1/2008 | 2018 F250  |
|          | 2003 Ford F-150 Tommy Gate                    | 91        | PT-Parks Maint         | 5/3/2003 | 2012 F 250 |
|          | 2018 Ford F250 Tommy Gate- Plow               | 93        | FT-Parks- Transport    | 1/1/2018 | 2028       |
|          | 2012 Ford F-250 Tommy Gate- Plow              | 94        | FT-Parks- Transport    | 7/1/2012 | 2027       |
|          | 2026 Ford F-450 Flatbed-Future Plow/Salter    | 95        | Parks- Flatbed         | 1/1/2026 | 2026       |
|          | 2025 Ford F-150- Tommy Gate - Aluminum        | 96        | FT-Parks- Transport    | 1/1/2025 | 2045       |
|          | 2023 Ford F-150 Tommy Gate                    | 97        | FT-Parks- Transport    | 1/1/2023 | 2043       |
|          | 2022 Ford F350 Tommy Gate- Main Plow Truck    | 98        | FT-Parks- Transport    | 1/1/2022 | 2042       |
|          | Van   | 18        | PT-City Scape-Watering |          | 2042       |
| Trade In | 1999 Ford F-350 Flatbed- Plow                 | 95        | Parks- Flatbed         | 1/1/1999 |            |
|          |   |           |                        |          |            |
| 2027     | Vehicle and Options                           | Truck No. | Division               | Year     | Scheduled  |
|          | Ford F-150 Tommy Gate- White Water Truck      | 26        | PT-City Scape          | 8/1/2008 |            |
|          | 2003 Ford F-150 Tommy Gate                    | 90        | PT-Parks Maint         | 5/3/2003 | 2012 F 250 |
|          | 2012 Ford F-250 Tommy Gate- Plow              | 91        | PT-Parks Maint         | 7/1/2012 | 2027       |
|          | 2018 Ford F250 Tommy Gate- Plow               | 93        | FT-Parks- Transport    | 1/1/2018 | 2018 F250  |
|          | 2027 Ford F250 Tommy Gate- Plow               | 94        | FT-Parks- Transport    | 8/1/2008 |            |
|          | 2026 Ford F-450 Flatbed-Future Plow/Salter    | 95        | Parks- Flatbed         | 1/1/2026 | 2045       |
|          | 2025 Ford F-150- Tommy Gate - Aluminum        | 96        | FT-Parks- Transport    | 1/1/2025 | 2043       |
|          | 2023 Ford F-150 Tommy Gate                    | 97        | FT-Parks- Transport    | 1/1/2023 | 2042       |
|          | 2022 Ford F350 Tommy Gate- Polw               | 98        | FT-Parks- Transport    | 1/1/2022 | 2042       |
|          | Van   | 18        | PT-City Scape-Watering |          |            |
| Trade In | 2008 Ford F-250 Tommy Gate- Plow              | 90        | PT-Parks Maint         | 8/1/2008 |            |
|          |   |           |                        |          |            |
| 2028     | Vehicle and Options                           | Truck No. | Division               | Year     | Scheduled  |
|          | Ford F-150 Tommy Gate- White Water Truck      | 26        | PT-City Scape          | DPW      |            |
|          | 2018 Ford F250 Tommy Gate-                    | 90        | PT-Parks Maint         | 1/1/2018 |            |
|          | 2012 Ford F-250 Tommy Gate- Plow              | 91        | PT-Parks Maint         | 7/1/2012 |            |
|          | 2028 Ford F-150 Tommy Gate                    | 93        | FT-Parks- Transport    | 1/1/2023 |            |
|          | 2027 Ford F250 Tommy Gate- Plow               | 94        | FT-Parks- Transport    | 1/1/2027 | 2028       |
|          | 2026 Ford F-450 Flatbed-Future Plow/Salter    | 95        | Parks- Flatbed         | 1/1/2026 | 2045       |
|          | 2025 Ford F-150- Tommy Gate - Aluminum        | 96        | FT-Parks- Transport    | 1/1/2025 | 2043       |
|          | 2023 Ford F-150 Tommy Gate                    | 97        | FT-Parks- Transport    | 1/1/2023 | 2042       |
|          | 2022 Ford F350 Tommy Gate- Plow               | 98        | FT-Parks- Transport    | 1/1/2022 | 2042       |
|          | Blue Van                                      | 18        | PT-City Scape-Watering |          |            |
| Trade In | 2003 Ford F-150 Tommy Gate                    | 91        | PT-Parks Maint         | 5/3/2003 |            |



Date: **01/23/2026 9:15 AM**  
 Salesperson: **Dennis Mitchell**  
 Manager: **John Chady**

**FOR INTERNAL USE ONLY**

**BUSINESS NAME** CITY OF FORT ATKINSON Home Phone: **(920) 563-7781**  
**CONTACT**  
 Address: 101 N MAIN ST  
FORT ATKINSON, WI 53538 Work Phone:  
JEFFERSON CO  
 E-Mail: bdayton@fortatkinsonwi.gov Cell Phone: **(920) 723-1112**

**VEHICLE**  
 Stock #: \_\_\_\_\_ New / Used : **New** VIN : \_\_\_\_\_ Mileage : **0**  
 Vehicle : **2026 Ford F-450 Chassis** Color : \_\_\_\_\_  
 Type : **XL 4x4 SD Regul**

**TRADE IN**  
 Payoff : \_\_\_\_\_ VIN : \_\_\_\_\_ Mileage : \_\_\_\_\_  
 Vehicle : \_\_\_\_\_ Color : \_\_\_\_\_  
 Type : \_\_\_\_\_

|                         |       |           |
|-------------------------|-------|-----------|
| Selling Price           | _____ | 63,005.00 |
| Discount                | _____ | 7,803.00  |
| Adjusted Price          | _____ | 55,202.00 |
| _____                   | _____ | _____     |
| _____                   | _____ | _____     |
| _____                   | _____ | _____     |
| _____                   | _____ | _____     |
| _____                   | _____ | _____     |
| Total Purchase          | _____ | 77,542.00 |
| Trade Allowance         | _____ | _____     |
| <b>Trade Difference</b> | _____ | _____     |
| Service Fee             | _____ | 499.00    |
| Non Tax Fees            | _____ | 257.50    |
| Trade Payoff            | _____ | _____     |
| Cash Deposit            | _____ | _____     |
| Balance                 | _____ | 78,298.50 |

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 F999 - F4H 4x4 Reg Chas Cab DRW: Order Summary Time of Preview: 01/10/2026 14:15:54 Receipt: NA

Dealership Name: Griffin Ford Fort Atkinson, Inc.

Sales Code : F41379

|               |            |               |       |              |           |             |      |
|---------------|------------|---------------|-------|--------------|-----------|-------------|------|
| Dealer Rep.   | John Chady | Type          | Fleet | Vehicle Line | Superduty | Order Code  | F999 |
| Customer Name | CityofFort | Priority Code | C2    | Model Year   | 2026      | Price Level | 635  |

| DESCRIPTION                   | MSRP    | DESCRIPTION                    | MSRP         |
|-------------------------------|---------|--------------------------------|--------------|
| F450 4X4 CHASSIS CAB DRW/169  | \$59445 | 50 STATE EMISSIONS             | \$0          |
| 169 INCH WHEELBASE            | \$0     | SNOW PLOW PREP PACKAGE         | \$350        |
| TOTAL BASE VEHICLE            | \$59445 | JOB #1 ORDER                   | \$0          |
| CARBONIZED GRAY               | \$0     | 250 AMP ALTERNATOR             | \$0          |
| VINYL 40/20/40 SEATS          | \$0     | PRICE CONCESSION INDICATOR     | \$0          |
| MEDIUM DARK SLATE             | \$0     | REMARKS TRAILER                | \$0          |
| PREFERRED EQUIPMENT PKG.650A  | \$0     | CONN PKG: 1 YR INCL W/FORD APP | \$0          |
| .XL TRIM                      | \$0     | XL CHROME PACKAGE              | \$425        |
| .AIR CONDITIONING -- CFC FREE | \$0     | .FOG LAMPS                     | \$0          |
| .AM/FM STEREO MP3/CLK         | \$0     | .REMOTE START SYSTEM           | \$0          |
| .7.3L DEVCT NA PFI V8 ENGINE  | \$0     | SPECIAL FLEET ACCOUNT CREDIT   | \$0          |
| 10-SPEED AUTO TORQSHIFT       | \$0     | FUEL CHARGE                    | \$0          |
| 225/70R19.5G TRACTION TIRES   | \$190   | PRICED DORA                    | \$0          |
| 4.88 RATIO NON LTD SLIP AXLE  | \$0     | ADVERTISING ASSESSMENT         | \$0          |
| 16500# GVWR PACKAGE           | \$0     | DESTINATION & DELIVERY         | \$2595       |
| TOTAL BASE AND OPTIONS        |         |                                | MSRP \$63005 |
| DISCOUNTS                     |         |                                | NA           |
| TOTAL                         |         |                                | \$63005      |

ORDERING FIN: Q1278 END USER FIN: Q1278

INCENTIVES

Acc. Code ID :10 Contract/Ref # :06-386T Bid Date :05/08/25State : WI

DISCOUNTS:

\$-1800.00

Customer Name:  
Customer Address:

Customer Email:  
Customer Phone:

# MADISON TRUCK EQUIPMENT INC.

A Complete Line  
Of  
Truck Equipment

2410 S. Stoughton Road  
Madison, WI 53716-2898

**Telephone (608) 222-5591**  
Wisconsin (800) 259-7453  
FAX (608) 222-3644

To: **Dealers Bidding**  
**City of Fort Atkinson**  
Address: 101 N Main St.  
City: Fort Atkinson, WI  
Attention:  
Telephone #:  
Fax #:  
Cell

Date: 01/15/26  
Delivery:  
Dealer: **City of Fort Atkinson**  
P. O. #:

Terms: **NET ON DELIVERY**, unless specified

| Quantity   | QUOTE GOOD FOR 30 DAYS   | PRICE EACH            |
|--|--|-----------------------|
| <b>One</b>   | <b>11' x 7' Crysteel STIP Stainless Steel Dump Body with</b><br>2/3 yard capacity, 14" Sides, 20" rear<br>Crossmemberless Understructure<br>7 Ga. Grade 50 Floor<br><b>12 ga. Stainless Steel Sides, 10 Ga. Stainless Steel Front, &amp; Tailgate</b><br>Integral 1/4 cab shield with punched window<br>Double hinged tailgate, with single quick release lever<br>Quick release upper tailgate pins<br>DOT Marker Lights and Reflectors |                       |
| <b>One</b>   | <b>Crysteel 516-DA (Replaces LB 510) subframe scissors hoist with</b><br>7.8 ton capacity with 50 degree dump angle<br>sub-frame & hinge, tank, double acting cylinder, all greaseable Pivots and hinge<br>Mounted with body prop, body raise light, back up alarm<br>Fleet Engineer Poly Fenders for 19.5 Tires, With Rubber Flaps on Poly Fender at Rear<br>Body Only Undercoated (Factory)  |                       |
| <b>Misc.</b>   | Buyers 1/2" Plate with 2 1/2" Receiver Hitch with Underride, 7 way RV Plug   |                       |
| <b>One Set</b>   | Federal Signal L.E.D. Mini Hi-Lighter, Wire in conduit on front Bulkhead   |                       |
| <b>One Set</b>   | SSI Mini LED Amber Alternating Flashing Lights on rear posts   |                       |
|  | Grip Strut Plank Running Board (Reg Cab)   |                       |
|  | Installed FOB Madison, WI  |                       |
|  | <b>TOTAL</b>   | <b>\$22,340.00</b>    |
| <b>OPTION</b>  | 3/16 AR 400 Floor In Lieu of 7 Ga. Grade 50  | <b>ADD \$1,256.00</b> |
| The quoted price includes ONLY what is described above.<br>Madison Truck Eq. Does Not Guarantee 100% Paint Match |  |                       |
| <b>Chassis Make</b>  | <b>Ford F-450 Reg Cab</b>  | <b>CA: 84"</b>        |
| <b>Customer Signature and Date</b>   | <b>Trans:</b>  | <b>Subtotal</b>       |
|  | <b>Salesman</b>  | <b>Tax 5.5%</b>       |
|  |  | <b>F.E.T. 12%</b>     |
|  | <b>KURT SCHADEWALT</b>   | <b>TOTAL</b>          |



## MEMORANDUM

**DATE:** March 17, 2026

**TO:** Fort Atkinson City Council

**FROM:** Ben Dayton, Director of Parks and Recreation

**RE:** Review and possible action related to the purchase and replacement of two Air Conditioning Units at the Fort Atkinson Senior Center (Dayton, Parks and Recreation Director)

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### BACKGROUND

The Senior Center's air conditioning units were last replaced in 1991 and have significantly exceeded their expected service life. Funding for their replacement was approved in the 2026 Capital Improvement Plan through levied dollars (Section R, Page 207).

It is important to note that the Senior Center functions as a designated public cooling site during extreme heat warnings and advisories. Making this critical update will enhance the center's reliability in serving this purpose.

### DISCUSSION

Staff obtained a proposal from Armstrong Heating and Cooling, which currently provides regular maintenance of the Lennox furnaces and AC units at the Senior Center and the Municipal Building. The per-unit proposal is \$5,725.00, which includes installation of the new unit and removal of the existing unit.

Staff requested an additional proposal to replace the two thermostat units with Wi-Fi-enabled programmable thermostats, which came in at \$220 per unit. These thermostats will improve efficiency and allow staff to remotely schedule and adjust temperatures, leading to lower energy costs.

Both the Senior Center and the Municipal Building have used Lenox brand air conditioners for many years, and staff has been pleased with the performance, useful life, and ease of maintenance of these units. Armstrong Heating and Cooling is the only Lenox dealer in the area. As such, staff did not seek additional proposals from other contractors for this project.

### FINANCIAL ANALYSIS

The 2026 CIP includes \$12,000 in levied funds for the replacement of these air conditioners at the Senior Center. The total cost to replace both AC units is \$11,450, plus an additional \$440 for

two new thermostats, for a total of \$11,890.

**RECOMMENDATION**

Staff recommends that the City Council authorize the purchase and installation of two Lennox air-conditioning units and two wireless thermostats from Armstrong Heating and Cooling, at a cost not to exceed \$11,890.00.

**ATTACHMENTS**

1. SC- Armstrong Heating and Cooling- Thermostat Quote- 26 CIP
2. SC- Armstrong Heating and Cooling- AC Unit Quote 26 CIP

Proposal  
**Armstrong Heating and Cooling**

1205 Industrial Drive  
Fort Atkinson, WI 53538  
920-563-8825  
Owner: Matthew Armstrong

|   |               |  |
|---|---------------|--|
| <b>Proposal Submitted To:</b>   | Date: 3-11-26 | <b>Work To Be Performed At:</b>  |
| Name: FORT PARK AND REC- SENIOR CENTER<br>Street:<br>City:<br>State:<br>Phone: 630 797-0709 |               | Street:<br>City:<br>State:<br>Date of Plans<br>Email: bdayton@fortatkinsonwi.gov |

We hereby propose to furnish all materials and perform all labor necessary for the completion of:

-#1 INSTALLATION 2-PRO 1 T705 PROGRAMABLE THERMOSTATS. LABOR AND MATERIALS **\$250.00**

-#2 SENSI WIFI # 1F87U-42WF THERMOSTATS **\$440.00**

Payments to be made as follows: FULL PAYMENT UPON COMPLETION.

Any alteration or deviation from above specifications involving extra costs will be executed only upon written orders and will become an extra charge over and above the proposal amount. All agreements contingent upon strikes, accidents or delays beyond our control. Owner to carry fire. Tornado and other necessary insurance for above work listed. Workman's Compensation and public Liability Insurance for above work to be take out by:

Respectfully submitted: *MATTHEW ARMSTRONG*

Note-this proposal may be withdrawn by us if not accepted within 60 days.

**ACCEPTANCE OF PROPOSAL**

The above, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above.

Signature to Accept: \_\_\_\_\_

Date: \_\_\_\_\_

For 2026

Proposal  
**Armstrong Heating and Cooling**

1205 Industrial Drive  
 Fort Atkinson, WI 53538  
 920-563-8825  
 Owner: Matthew Armstrong

|  |               |  |
|--|---------------|--|
| <b>Proposal Submitted To:</b>  | Date: 7-22-25 | <b>Work To Be Performed At:</b>  |
| Name: FORT ATKINSON PARK AND REC. DEPT.<br>Street: 101 N. MAIN ST.<br>City: FORT ATKINSON<br>State: WI, 53538<br>Phone: BEN 920-397-9910 |               | Street: 307 ROBERT ST.-FORT ATKINSON SENIOR CENTER<br>City: FORT ATKINSON<br>State: WI, 53538<br>Date of Plans<br>Email: |

We hereby propose to furnish all materials and perform all labor necessary for the completion of:

2-A LENNOX CENTRAL AIR CONDITIONER MODEL ML13KC1-060 5 TON 14.00 S.E.E.R

PRICE INCLUDES NEW INDOOR A-COIL, NEW COPPER LINE SET, WIRNG, DRAIN LINE AND REMOVAL OF OLD UNIT

All material is guaranteed to be as specified, the above work to be performed in accordance with drawings and specifications submitted and completed in a substantial workmanlike manner for the sum of:

Dollars: **\$5,725.00/EACH=\$11,450.00 TOTAL**

Payments to be made as follows: FULL PAYMENT UPON COMPLETION.  
 Any alteration or deviation from above specifications involving extra costs will be executed only upon written orders and will become an extra charge over and above the proposal amount. All agreements contingent upon strikes, accidents or delays beyond our control. Owner to carry fire. Tornado and other necessary insurance for above work listed. Workman's Compensation and public Liability Insurance for above work to be take out by:

Respectfully submitted: *Matt Armstrong*

Note-this proposal may be withdrawn by us if not accepted within 60 days.

**ACCEPTANCE OF PROPOSAL**

The above, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above.

Signature to Accept: \_\_\_\_\_

Date: \_\_\_\_\_