



City of Beaver Dam, Wisconsin
Common Council Meeting

205 S. Lincoln Ave; Council Chambers
Monday, August 3, 2026 at 7:30 PM

[YouTube Link](#)

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Meeting ID: 814 3788 9032

Passcode: 875132

Join by Phone: (646) 558-8656

AGENDA

- 1) Call to Order – Roll Call
 - a) Pledge - Silent Deliberation
 - b) Informal Public Comment
 - c) Announcements
 - d) Disposition of Minutes of the Common Council Meeting July 20, 2026
- 2) Presentations & Reports
 - a) City Administrator Report
 - b) Communications
 - c) Approval of bills between July 17, and July 30, 2026 in the amount of \$313,463.50
 - d) Presentation by Beaver Dam Police Chief John Kreuzinger and Dodge County Human Services and Health Director Becky Bell on the Co-Responder partnership
 - e) Presentation on How to Facilitate the Creation of Additional Rental and For-Sale Housing Units by Jolena Presti of Baker Tilly Advisory Group, LP
 - f) Presentation by The Archer Company to discuss Wage Classification, Compensation and Benefits Study
- 3) Ordinances
 - a) **ORDINANCE NO. 14-2026** An Ordinance Amending Chapter 58 of the City of Beaver Dam Municipal Code Regarding Land Division - Second Reading and Public Hearing
 - b) **ORDINANCE NO. 15-2026** - An Ordinance amending the City of Beaver Dam Room Tax Ordinance 2-124(K) - First Reading
 - c) **ORDINANCE NO. 16-2026** An Ordinance Amending Section 70-84, R-1 Single Family Residential District, of the Beaver Dam Municipal Code - First Reading
- 4) Resolutions
 - a) **RESOLUTION NO. 70-2026** A Resolution Authorizing the Complete and Final Report on Estimated Special Assessments for the 2026 Sewer Lateral & Water Service Replacement Program Project
 - b) **RESOLUTION NO. 71-2026** A Resolution Authorizing a Professional Services Agreement for

Application and Administration of the 2026 Clean Water Fund Loan

- c) **RESOLUTION NO. 72-2026** A Resolution Declaring Official Intent to Reimburse Expenditures
- d) **RESOLUTION NO. 73-2026** - A Resolution Authorizing Termination of Development Agreements and Forgivable Mortgages for Heritage Village Mall
- e) **RESOLUTION NO. 74-2026** - A Resolution Creating the Beaver Dam Parks Endowment Fund
- f) **RESOLUTION NO. 75-2026** - A Resolution Authorizing Outdoor Recreation Grant Applications
- g) **RESOLUTION NO. 76-2026** - A Resolution Amending the Budget of the City of Beaver Dam, Wisconsin for the Fiscal Year 2026
- h) **RESOLUTION NO. 77-2026** - A Resolution Authorizing the City Administrator to Execute a Consulting Services Contract with the Archer Company for a Classification and Compensation Study

5) Adjourn

This agenda was posted and made available to the news media, public and various City officials, and staff in compliance with the State of WI Open Meetings Law and Operations Committee policy:

Posted: 7/31/26 by Tracey Ferron, City Clerk at 9:30 a.m.

A quorum of the Common Council may attend this meeting.

Requests from persons with disabilities who need assistance to participate in this meeting or hearing should be made to the City Clerk's office at 887-4600, Ext. 338, with as much advance notice as possible.



1) Call to Order – Roll Call

The meeting of the Common Council was called to order at 7:30 p.m. by Mayor Marck. Present: Jeff Bierman, Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Jennifer Hiley, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 14. Absent: 0.

- a) Pledge - Silent Deliberation
- b) Informal Public Comment

Members of the public spoke regarding flock cameras and PFAS concerns with the new proposed Fire Department and recent Data Center fire. A representative of Beaver Dam Hockey spoke regarding an upcoming hockey tournament in October.

c) Announcements

The mayor presented the Parks & Recreation Proclamation. She congratulated the City and its employees on a successful celebration of America's 250th birthday and BeaverFest. She announced that the ribbon cutting was held at Edgewater Park for the Storybook Trail and encouraged residents to check out the books.

d) Disposition of Minutes of the Common Council Meeting June 15, 2026

Motion by Jennifer Hiley, second by Nancy Wild, to approve. Motion carried by acclamation.

2) Presentations & Reports

a) City Administrator Report

Bierke reported that he will be attending Leadership Beaver Dam beginning in September. The Operations Committee received their first draft of the Capital Improvement Plan this evening and would like to have a work session meeting with all the council. The Administrative Committee adopted the RFP for assessment services which is on the council agenda for this evening. The Finance department is working on the 2026 debt issue, and he is starting budget preparation for 2027. He spent quite a bit of time working with the DNR on Beaver Dam Lake carp issues and what to do with all the fish.

b) Communications

There were no communications this evening.

c) Approval of bills between June 12, and July 16, 2026 in the amount of \$2,351,200.20

Motion by Zach Zopp, second by Julie Wendt, to approve. Motion carried by acclamation.

d) Presentation by Carmen Winkelman, Employee Benefit Consultant at R & R Insurance regarding City's 2027 Health Insurance

Carmen Winkelman, Employee Benefit Consultant at R&R Insurance presented the City's 2027 Health Insurance presentation.

3) Ordinances

a)

ORDINANCE NO. 12-2026 An Ordinance Amending Section 2.46 of the Beaver Dam Municipal Code re: standing committee updates - Second Reading and Public Hearing

Mayor Marck opened the Public Hearing. No community members spoke during the Public Hearing. Mayor Marck closed the Public Hearing.

Motion by Zach Zopp, second by Jack Yuds, to approve. The preceding motion passed by the following vote: Ayes: Jeff Bierman, Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Jennifer Hiley, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 14. Noes: 0.

b) **ORDINANCE NO. 13-2026** An Ordinance Amending Sections 2-5, 2-41, 2-42, 2-88 and 2-404.1 of the Beaver Dam Municipal Code re: salaries and compensation, meetings, City Administrator - Second Reading and Public Hearing

Mayor Marck opened the Public Hearing. No community members spoke during the Public Hearing. Mayor Marck closed the Public Hearing.

Motion by Jack Yuds, second by Mick Fischer, to approve. Ordinance No. 13-2026 was given the following roll call vote: Ayes: Kevin Burnett, Frank Ferree, Mick Fischer, Jennifer Hiley, Monica Keel, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, 9. Noes: Jeff Bierman, Chris Ganske, Cris Olson, Andrew Perkins, Zach Zopp, 5. After the meeting, it was determined that Ordinance No. 13-2026 failed due to a lack of 3/4 majority vote.

c) **ORDINANCE NO. 14-2026** An Ordinance Amending Chapter 58 of the City of Beaver Dam Municipal Code Regarding Land Division - First Reading

Ordinance No. 14-2026 was given its first reading. The second reading and public hearing will be held on August 3, 2026.

4) Resolutions

a) **RESOLUTION NO. 61-2026** A Resolution Awarding the Contract to Supply and Install a Vertical Turbine Backwash Pump at the Water Treatment Plant

Motion by Jennifer Hiley, second by Frank Ferree, to approve. The preceding motion passed by the following vote: Ayes: Jeff Bierman, Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Jennifer Hiley, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 14. Noes: 0.

b) **RESOLUTION NO. 62-2026** A Resolution Authorizing a Professional Services Agreement for Lower Tower Parking Lot Improvements

Motion by Jennifer Hiley, second by Nancy Wild, to approve. The preceding motion passed by the following vote: Ayes: Jeff Bierman, Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Jennifer Hiley, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 14. Noes: 0.

c) **RESOLUTION NO. 63-2026** A Resolution Awarding the Contract for the Eagle's View Addition 3 Utility and Street Construction Project

Motion by Mick Fischer, second by Chris Ganske, to approve. The preceding motion passed

by the following vote: Ayes: Jeff Bierman, Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Jennifer Hiley, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 14. Noes: 0.

- d) **RESOLUTION NO. 64-2026** A Resolution Accepting a Donation from Qing Yang to Support the Beaver Dam Police Department

Motion by Jennifer Hiley, second by Monica Keel, to approve. The preceding motion passed by the following vote: Ayes: Jeff Bierman, Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Jennifer Hiley, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 14. Noes: 0.

- e) **RESOLUTION NO. 65-2026** A Resolution Applying for Inclusion Under the Wisconsin Continuation Insurance Plan

Motion by Zach Zopp, second by Nancy Wild, to approve. The preceding motion passed by the following vote: Ayes: Jeff Bierman, Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Jennifer Hiley, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 14. Noes: 0.

- f) **RESOLUTION NO. 66-2026** A Resolution Denying the Claim of Tiana MacDonald for Alleged Continuing and Repeated Injuries

Motion by Kevin Burnett, second by Jeff Bierman, to approve. The preceding motion passed by the following vote: Ayes: Jeff Bierman, Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Jennifer Hiley, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 14. Noes: 0.

- g) **RESOLUTION NO. 67-2026** A Resolution to Approve a Temporary Class B License for the Beaver Dam Pepper Festival on September 12, 2026

Motion by Mick Fischer, second by Jack Yuds, to approve. The preceding motion passed by the following vote: Ayes: Jeff Bierman, Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Jennifer Hiley, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 14. Noes: 0.

- h) **RESOLUTION NO. 68-2026** A Resolution to Approve a Temporary Class B License for Beaver Dam Hockey Association Spooktacular Hockey Tournament on October 16-18, 2026

Motion by Mick Fischer, second by Frank Ferree, to approve. The preceding motion passed by the following vote: Ayes: Jeff Bierman, Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 13. Noes: 0. Abstain: Jennifer Hiley, 1.

- i) **RESOLUTION NO. 69-2026** A Resolution Approving the Stoney Ridge Phase II Development Agreement

Campbell gave a brief presentation on the proposed resolution. Motion by Mick Fischer, second by Kevin Burnett, to approve. The preceding motion passed by the following vote: Ayes: Kevin Burnett, Frank Ferree, Mick Fischer, Chris Ganske, Jennifer Hiley, Monica Keel, Cris Olson, Andrew Perkins, Bart Radke, Julie Wendt, Nancy Wild, Jack Yuds, Zach Zopp, 13. Noes: Jeff Bierman, 1.

5) Discussion & Possible Action

- a) Discuss Idea of Updating Existing Impact Fees and/or Creating New Fees

Lengthy discussion was held on Updating Existing Impact Fees and/or Creating New Fees. Bierke updated the council that both Operations and Administrative Committees have discussed this agenda item at length separately. The Administration Committee wanted to move forward with the existing fees and find out what a Fire Station fee would be. The Operations Committee thought there should be other fees possibly listed. Bierke suggested that the council could put this off until next year to review it again. However, if the council does not do a study, current fees cannot be charged as they do expire.

b)

Beaver Dam City Assessor Services Request for Proposals

Bierke updated the council that the Beaver Dam City Assessor Services expires at the end of this year as the city contracts this out. The Administrative Committee discussed this and would like to propose a request for approval (RFP) to move forward with putting out bids for this service. Motion by Zach Zopp, second by Cris Olson, to approve Assessor Services RFP. Motion carried by acclamation.

6) Adjourn

Motion by Kevin Burnett, second by Jack Yuds, to adjourn. Motion carried by acclamation. The mayor adjourned the meeting at 9:06 p.m.

Vendor Name	Merchant #	Merchant Name	Invoice Number	Description	Invoice Date	Net Invoice Amount	Period
01-0000-162200 PREPAID INSURANCE EXPENSE							
DELTA DENTAL OF WISCO	102806	DELTA DENTAL OF WISCONSIN	2593510	DELTA DENTAL	08/31/2026	823.28	
01-0000-219100 POLICE & FIRE UNIFORM FUND							
HOPPER'S	102466	HOPPER'S	89102	CLOTHING ALLOWANCE (WOLDT)	07/20/2026	73.50	
JASON ALVARADO	103236	JASON ALVARADO	072026 CLOTHING	CLOTHING ALLOWANCE (ALVAR	07/20/2026	208.51	
JASON ALVARADO	103236	JASON ALVARADO	072726 CLOTHING	CLOTHING ALLOWANCE (ALVAR	07/27/2026	53.00	
JOANNE BERNHARDT	103633	JOANNE BERNHARDT	071526 CLOTHING	CLOTHING ALLOWANCE (BRENH	07/15/2026	227.55	726
01-0000-239233 JAM BY THE DAM							
NSB ENTERTAINMENT LLC	103978	NSB ENTERTAINMENT LLC	072426	JULY 24 PRODUCTION FEE-ZAC M	07/24/2026	600.00	
01-0000-239250 FIRE COMMUNITY FOUNDATION							
MICK FISCHER TROPHY &	103161	MICK FISCHER TROPHY & ENGRA	6301	CADET BANQUET	07/07/2026	39.20	
01-0000-239253 SENIOR TRAVEL ACCOUNT							
KIM'S TOURS	103002	KIM'S TOURS	090826 BREWERS	#07 BREWERS 09-08-26 M\$99X53	07/24/2026	5,247.00	726
01-0000-431100 LIQUOR & MALT BEVERAGE LICENSE							
WIS DEPT OF JUSTICE	101900	WIS DEPT OF JUSTICE	G2609 063026	WORCS	06/30/2026	413.00	
01-0000-431810 DOG LICENSES							
DODGE COUNTY TREASUR	18804	DODGE COUNTY TREASURER	2026 DOG TAGS 20	DOG TAGS	07/27/2026	40.50	
Total :						7,725.54	
MUNICIPAL COURT							
01-0103-533000 DATA PROCESSING SERVICE & EXP.							
WIS DEPT OF JUSTICE - TIM	94828	WIS DEPT OF JUSTICE - TIME	455TIME-000002024	TIME ACCESS	07/10/2026	375.00	
Total MUNICIPAL COURT:						375.00	
MAYOR							
01-0104-530120 TRAINING & TRAVEL							
MARCK, BOBBI	103634	MARCK, BOBBI	033126 EXPENSE	MILEAGE/MEALS	03/31/2026	519.75	
Total MAYOR:						519.75	
CLERK							
01-0108-530010 SUPPLIES & OTHER EXPENSES							
STAPLES ADVANTAGE	99860	STAPLES ADVANTAGE	7010634123	STAPLES	07/18/2026	70.60	
Total CLERK:						70.60	
MUNICIPAL BUILDING							
01-0118-530090 POSTAGE/COPIER/INTERNET SERV.							
METRO SALES INC	103445	METRO SALES INC	INV3140022	COPIER	07/20/2026	381.83	
US BANK CREDIT CARD	98655	SPECTRUM	171124001-0526	INTERNET	05/21/2026	246.00-	626

Vendor Name	Merchant #	Merchant Name	Invoice Number	Description	Invoice Date	Net Invoice Amount	Period
01-0118-530100 BUILDING REPAIR - CITY HALL							
HOMETOWN GLASS & IMP	37197	HOMETOWN GLASS & IMPROVEM	I255412	FD OVERHEAD DOOR	07/15/2026	630.06	
01-0118-530101 BUILDING REPAIR - POLICE DEPT.							
BASSETT MECHANICAL	101716	BASSETT MECHANICAL	321674	MAINTENANCE AGREEMENT	04/01/2026	577.00	
BASSETT MECHANICAL	101716	BASSETT MECHANICAL	324394	MAINTENANCE AGREEMENT	05/01/2026	577.00	
BASSETT MECHANICAL	101716	BASSETT MECHANICAL	326968	MAINTENANCE AGREEMENT	06/01/2026	577.00	
BASSETT MECHANICAL	101716	BASSETT MECHANICAL	330045	HVAC MAINT PD	07/01/2026	577.00	
TOTAL ENERGY SYSTEMS L	85081	TOTAL ENERGY SYSTEMS LLC	INV166423	GENERATOR MAINT	07/24/2026	1,317.00	
01-0118-530102 BUILDING REPAIR - LIBRARY							
MENARDS - BEAVER DAM	99427	MENARDS - BEAVER DAM	97805	LIBRARY ELECTRICAL REPLACEM	06/24/2026	356.69	
Total MUNICIPAL BUILDING:						4,747.58	
POLICE DEPARTMENT							
01-0320-520010 TELEPHONE							
VERIZON WIRELESS	99683	VERIZON WIRELESS	6148346778	CELL PHONES AND DATA	07/10/2026	2,303.65	
01-0320-530010 SUPPLIES & OTHER EXPENSES							
T-MOBILE USA INC	103811	T-MOBILE USA INC	L2606250134	INVESTIGATION - B26-05549	06/25/2026	50.00	
01-0320-530014 K-9 EXPENSES							
ANIMAL CLINIC OF BEAVE	103467	ANIMAL CLINIC OF BEAVER DAM	80641	LIBRELA INJECTION - BOOMER	07/15/2026	92.56	
ANIMAL CLINIC OF BEAVE	103467	ANIMAL CLINIC OF BEAVER DAM	80642	SIMPARICA CHEWS - MURPH	07/15/2026	279.60	
ANIMAL CLINIC OF BEAVE	103467	ANIMAL CLINIC OF BEAVER DAM	80660	WELLNESS EXAM AND VACCINAT	07/15/2026	61.00	
JESSIFFANY CANINE SERVI	101294	JESSIFFANY CANINE SERVICES LL	26-110	CANINE BOARDING - MURPH	07/21/2026	75.00	
01-0320-530018 OFFICER EQUIPMENT REPLACEMENT							
TOP PACK DEFENSE LLC	101757	TOP PACK DEFENSE LLC	19466	BALISTIC VEST - STRACHOTA	07/13/2026	1,110.00	
01-0320-530019 HIRING AND RECRUITMENT							
FOX VALLEY TECHNICAL	29101	FOX VALLEY TECHNICAL COLLEG	SPINV038466	ACADEMY UNIFORM AND FEES	07/22/2026	134.50	
TOP PACK DEFENSE LLC	101757	TOP PACK DEFENSE LLC	19413	SHOULDER PATCHES X300	07/10/2026	606.00	726
01-0320-530070 POSTAGE,COPIER,SUPPLIES & MISC							
METRO SALES INC	103445	METRO SALES INC	INV3145916	COPIER	07/27/2026	71.94	
01-0320-530120 TRAINING & TRAVEL							
MEGAN RUHLAND	102929	MEGAN RUHLAND	071326 EXPENSE	MEAL EXPENSE - RUHLAND	07/13/2026	8.31	
01-0320-533001 SOFTWARE AND RELATED EXPENSES							
WIS DEPT OF JUSTICE - TIM	94828	WIS DEPT OF JUSTICE - TIME	455TIME-000002022	BADGERNET, TIME ACCESS & OFFI	07/10/2026	2,435.25	
Total POLICE DEPARTMENT:						7,227.81	
TRAFFIC CONTROL							
01-0322-530010 SUPPLIES & OTHER EXPENSES							
LANGE ENTERPRISES	51400	LANGE ENTERPRISES	95461	CHURCH SIGNS	06/23/2026	444.27	
Total TRAFFIC CONTROL:						444.27	

Vendor Name	Merchant #	Merchant Name	Invoice Number	Description	Invoice Date	Net Invoice Amount	Period
FIRE DEPARTMENT							
01-0325-520010 TELEPHONE							
US CELLULAR	13416	US CELLULAR	821203597	JUNE CELL BILL	07/16/2026	242.09	
01-0325-520020 EQUIPMENT REPAIR							
HAMMES FIRE & SAFETY L	34195	HAMMES FIRE & SAFETY LLC	45914	RECHARGE (2) 5# DRY CHEM EXTI	07/15/2026	78.00	
RIVERSIDE TIRE & AUTO	103788	RIVERSIDE TIRE & AUTO	171275	REPLACE FRONT AND REAR BRAK	07/27/2026	932.96	
STRYKER SALES LLC	103628	STRYKER SALES LLC	9212896331	REPLACE CONTROL BOARD ON 12	07/17/2026	3,853.90	
01-0325-530025 PARAMEDIC EQUIPMENT							
LEXIPOL	102696	LEXIPOL	INVPRA11269581	ANNUAL EMS LEARNING PLATFO	05/18/2026	1,736.40	
PENNCARE INC	103687	PENNCARE INC	M160763	CARDIAC MONITOR CABLE (SPAR	03/02/2026	523.59	
01-0325-530120 TRAINING & TRAVEL							
JAHNKE'S PIGGLY WIGGLY	101845	JAHNKE'S PIGGLY WIGGLY	PW 304 062626	PALLET OF BOTTLED WATER (TRA	06/26/2026	467.22	
01-0325-530121 EMS SUPPLIES							
AIRGAS USA LLC	100409	AIRGAS USA LLC	9173845267	OXYGEN ORDER	07/16/2026	468.97	726
BOUND TREE MEDICAL LL	98601	BOUND TREE MEDICAL LLC	86273966	SHARPS CONTAINER, SYRINGES, I	07/10/2026	186.35	
BOUND TREE MEDICAL LL	98601	BOUND TREE MEDICAL LLC	86277604	PT TRANSPORTER (CASE), CAPNO	07/14/2026	628.65	
01-0325-530173 RECRUITMENT & RETENTION							
HOPPER'S	102466	HOPPER'S	89102	T-SHIRT (IFT/STRASESKE)	07/20/2026	17.00	
01-0325-533000 DATA PROCESSING SERVICE & EXP.							
METRO SALES INC	103445	METRO SALES INC	INV3145917	MONTHLY COPIER (JUNE-JULY)	07/27/2026	82.54	
Total FIRE DEPARTMENT:						9,217.67	
PUBLIC WORKS MACHINERY							
01-0530-520020 EQUIPMENT REPAIR							
BROOKS TRACTOR INC.	10960	BROOKS TRACTOR INC.	S72288	#36 HOSE	07/13/2026	105.51	
01-0530-530010 SUPPLIES & OTHER EXPENSES							
ALSCO	3670	ALSCO	IMIL2232919	TOWELS, UNIFORMS	07/15/2026	59.87	
ALSCO	3670	ALSCO	IMIL2234715	TOWELS, UNIFORMS	07/22/2026	59.87	
Total PUBLIC WORKS MACHINERY:						225.25	
GARAGE							
01-0532-530100 BUILDING REPAIR							
ALSCO	3670	ALSCO	IMIL2232919	RUGS, ETC.	07/15/2026	132.35	
ALSCO	3670	ALSCO	IMIL2234715	RUGS, ETC.	07/22/2026	132.35	
Total GARAGE:						264.70	
DPW/CITY ENGINEER							
01-0534-520130 CONTRACT ENG. SERVICES							
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	31178	GIS ADMIN	07/22/2026	184.00	

Vendor Name	Merchant #	Merchant Name	Invoice Number	Description	Invoice Date	Net Invoice Amount	Period
Total DPW/CITY ENGINEER:						184.00	
STREET REPAIR							
01-0536-530010 SUPPLIES & OTHER EXPENSES							
ALSCO	3670	ALSCO	IMIL2232919	FIRST AID	07/15/2026	35.40	
ALSCO	3670	ALSCO	IMIL2234715	FIRST AID	07/22/2026	35.40	
FARRELL EQUIPMENT & SU	101466	FARRELL EQUIPMENT & SUPPLY C	331918	CHANNEL FLOAT	07/15/2026	179.99	
Total STREET REPAIR:						250.79	
TREE CONTROL							
01-0543-520130 CONTRACT WORK							
K & B TREE & LAWN CARE	48130	K & B TREE & LAWN CARE LLC	434142	STORM DAMAGE	07/07/2026	1,247.16	
Total TREE CONTROL:						1,247.16	
COMMUNITY ACT & SERVICES							
01-0962-533000 TECHNOLOGY							
METRO SALES INC	103445	METRO SALES INC	INV3145915	METRO-PHOTO COPIERS	07/27/2026	122.75	
Total COMMUNITY ACT & SERVICES:						122.75	
COMMUNITY ACT & SERV - PROGRMS							
01-0963-530201 YEL PROGRAM							
YOUTH ENRICHMENT LEA	102256	YOUTH ENRICHMENT LEAGUE	5770	SCOUT BOTS JUN 29-JUL 2 (8 KIDS)	07/15/2026	864.00	
YOUTH ENRICHMENT LEA	102256	YOUTH ENRICHMENT LEAGUE	5770	MACQUEEN JUN 29-JUL 2 (5 KIDS)	07/15/2026	600.00	
YOUTH ENRICHMENT LEA	102256	YOUTH ENRICHMENT LEAGUE	5770	CODING JUL 6-9 (7 KIDS) (3 DAYS)	07/15/2026	567.00	
01-0963-530224 BD CELEBRATES 250							
OODLES OF FUN FACE PAI	103618	OODLES OF FUN FACE PAINTING	061526	AMERICA250-JULY 9, 2026 (2 HRS)	06/15/2026	250.00	
Total COMMUNITY ACT & SERV - PROGRMS:						2,281.00	
PARKS							
01-0968-520020 EQUIPMENT REPAIR							
REVELS TURF & TRACTOR	102911	REVELS TURF & TRACTOR LLC	401794	3 WHEELER REPAIR	07/22/2026	59.53	
01-0968-530010 SUPPLIES & OTHER EXPENSES							
K & B TREE & LAWN CARE	48130	K & B TREE & LAWN CARE LLC	434092	SUMMER CLEANUP DOWNTOWN	07/06/2026	3,200.00	
Total PARKS:						3,259.53	
GENERAL							

Vendor Name	Merchant #	Merchant Name	Invoice Number	Description	Invoice Date	Net Invoice Amount	Period
01-0199-520015 PERSONNEL LEGAL EXPENSES							
BOARDMAN & CLARK LLP	99642	BOARDMAN & CLARK LLP	320497	PERSONNEL/LEGAL EXPENSES	07/20/2026	2,590.90	
BOARDMAN & CLARK LLP	99642	BOARDMAN & CLARK LLP	320498	PERSONNEL/LEGAL EXPENSES	07/20/2026	23.00	
BOARDMAN & CLARK LLP	99642	BOARDMAN & CLARK LLP	320499	PERSONNEL/LEGAL EXPENSES	07/20/2026	5,883.00	
01-0199-520045 PROFESSIONAL SERVICES							
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	30109	CDBG ADMIN	06/19/2026	3,250.00	
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	31154	ENGINEERING - GENERATOR 151 B	07/21/2026	10,160.67	
VANDEWALLE & ASSOCIA	103620	VANDEWALLE & ASSOCIATES INC	202607002	ZONING ORDIN EVAL	07/16/2026	1,506.43	
Total GENERAL:						23,414.00	
TRANSFERS AND MISC EXPENSE							
01-1999-590020 BLDG MAINT-C OF C/HISTORICAL							
WYRICK WELDING LLC	103949	WYRICK WELDING LLC	071826	TRAIN REPAIR	07/18/2026	3,400.00	
Total TRANSFERS AND MISC EXPENSE:						3,400.00	
LIBRARY - COUNTY FUNDING							
21-0961-520020 EQUIPMENT REPAIR							
GREAT AMERICA FINANCI	101801	GREAT AMERICA FINANCIAL SVC	42615501	PRINTER LEASES	07/28/2026	354.00	
21-0961-530030 TRANSPORTATION & TRAVEL							
COURNOYER, SARAH	99445	COURNOYER, SARAH	072726 EXPENSE	COURNOYER MILEAGE/PARKING	07/27/2026	311.66	
21-0961-530070 POSTAGE, SUPPLIES & MISC							
MOTION PICTURE LICENSI	58586	MOTION PICTURE LICENSING COR	504478533	MOVIE LICENSE	06/18/2026	189.14	
21-0961-530080 BOOKS & PUBLICATIONS							
INGRAM LIBRARY SERVICE	42260	INGRAM LIBRARY SERVICES	97836018	PRINT BOOKS	07/12/2026	711.03	726
INGRAM LIBRARY SERVICE	42260	INGRAM LIBRARY SERVICES	97981208	PRINT BOOKS	07/19/2026	2,471.22	
INGRAM LIBRARY SERVICE	42260	INGRAM LIBRARY SERVICES	97983041	PRINT BOOKS	07/20/2026	18.00	
INGRAM LIBRARY SERVICE	42260	INGRAM LIBRARY SERVICES	97999551	PRINT BOOKS	07/20/2026	19.80	
INGRAM LIBRARY SERVICE	42260	INGRAM LIBRARY SERVICES	98014251	PRINT BOOKS	07/21/2026	32.00	
INGRAM LIBRARY SERVICE	42260	INGRAM LIBRARY SERVICES	98064532	PRINT BOOKS	07/23/2026	14.99	
INGRAM LIBRARY SERVICE	42260	INGRAM LIBRARY SERVICES	98137557	PRINT BOOKS	07/26/2026	1,524.94	
INGRAM LIBRARY SERVICE	42260	INGRAM LIBRARY SERVICES	98140263	PRINT BOOKS	07/27/2026	50.00	
INGRAM LIBRARY SERVICE	42260	INGRAM LIBRARY SERVICES	98156281	PRINT BOOKS	07/27/2026	19.20	
MIDWEST TAPE	98611	MIDWEST TAPE	509144239	AV DVDS & PROCESSING	07/15/2026	212.39	
PENWORTHY CO	101283	PENWORTHY CO	618766-IN	PRINT BOOKS	06/08/2026	183.85	726
US BANK CREDIT CARD	100878	AMAZON.COM	D01-4902229-635866	DIGITAL BOOK	06/28/2026	4.99	626
Total LIBRARY - COUNTY FUNDING:						6,117.21	
CIP PLAN PROJECTS							
40-0000-580182 BEAVER ST - FRONT TO W MAPLE							
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	28722	CDBG GRANT ADMIN	05/13/2026	681.55	

Vendor Name	Merchant #	Merchant Name	Invoice Number	Description	Invoice Date	Net Invoice Amount	Period
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	31045	ENGINEERING	07/17/2026	745.13	
40-0000-580214 STREET REHAB - VARIOUS STREETS							
LYCON INC	102870	LYCON INC	1188807-IN	MARY ST	07/19/2026	10,407.25	
40-0000-580294 FRONT - WEST TO MADISON							
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	28722	CDBG GRANT ADMIN	05/13/2026	863.25	
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	31045	ENGINEERING	07/17/2026	948.36	
40-0000-580313 LEAD SERVICE LINE REPLACEMENTS							
SCOTT LAMERS CONSTRU	102656	SCOTT LAMERS CONSTRUCTION L	218309-1	CONSTRUCTION - 2026 LSL	07/29/2026	16,029.82	
SCOTT LAMERS CONSTRU	102656	SCOTT LAMERS CONSTRUCTION L	218309-2	CONSTRUCTION - 2026 LSL	07/29/2026	17,624.40	
Total CIP PLAN PROJECTS:						47,299.76	
TID #6 PROJECT COSTS							
46-0000-580255 TOWER PARKING LOT IMPROV.							
RUEKERT & MIELKE INC	102642	RUEKERT & MIELKE INC	164931	ENGINEERING	07/29/2026	4,373.75	
Total TID #6 PROJECT COSTS:						4,373.75	
62-0000-550999 EQUIPMENT REPLACEMENT							
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	28722	CDBG GRANT ADMIN - FRONT/BE	05/13/2026	598.60	
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	31045	ENGINEERING - FRONT/BEAVER	07/17/2026	656.21	
Total :						1,254.81	
ADMINISTRATION							
62-3400-520045 ENGINEERING SERVICES							
MEAD & HUNT	103134	MEAD & HUNT	411284	ENGINEERING, GIS	07/15/2026	2,260.00	
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	31149	ENGINEERING - EPA ASSESS	07/21/2026	1,261.50	
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	31150	META FLUSHING EVAL	07/21/2026	1,005.00	
62-3400-530010 SUPPLIES & OTHER EXPENSES							
METRO SALES INC	103445	METRO SALES INC	INV3145913	COPIER	07/27/2026	11.31	
62-3400-530130 MISC. EXPENSES							
LEHNER, JOSEPH	100575	LEHNER, JOSEPH	072326 EXPENSE	MILEAGE, PERSONAL VEHICLE	07/23/2026	108.75	
Total ADMINISTRATION:						4,646.56	
PLANT MAINTENANCE							
62-2487-530010 SUPPLIES & OTHER EXPENSES							
MENARDS - BEAVER DAM	99427	MENARDS - BEAVER DAM	98616	MISC SUPPLIES	07/08/2026	63.12	
Total PLANT MAINTENANCE:						63.12	

Vendor Name	Merchant #	Merchant Name	Invoice Number	Description	Invoice Date	Net Invoice Amount	Period
OPERATIONS - LABOR & EXPENSE							
62-2288-530111 FUEL							
KWIK TRIP INC.	50854	KWIK TRIP INC.	2000208 063026	FUEL	06/30/2026	693.33	
62-2488-530010 SUPPLIES & OTHER EXPENSES							
CLEAN WATER TESTING LL	100572	CLEAN WATER TESTING LLC	9011993411	REGULATORY TESTING	07/14/2026	300.00	
UNITED LIQUID WASTE RE	100247	UNITED LIQUID WASTE RECYCLIN	67356	LOADS LIME SLURRY/LAND	06/15/2026	4,081.36	
UNITED LIQUID WASTE RE	100247	UNITED LIQUID WASTE RECYCLIN	68334	LOADS LIME SLURRY/LAND	07/20/2026	4,725.00	
UNITED LIQUID WASTE RE	100247	UNITED LIQUID WASTE RECYCLIN	68585	LOADS LIME SLURRY/LAND	07/27/2026	4,725.00	
62-2488-530015 CHEMICALS							
AIR PRODUCTS AND CHEM	100759	AIR PRODUCTS AND CHEMICALS	435931672	CO2 - CHEMICAL	07/24/2026	5,920.00	
MISSISSIPPI LIME CO.	57488	MISSISSIPPI LIME CO.	CD220013	HYDRATED LIME	07/14/2026	8,724.90	
MISSISSIPPI LIME CO.	57488	MISSISSIPPI LIME CO.	CD222153	HYDRATED LIME	07/21/2026	8,646.78	
Total OPERATIONS - LABOR & EXPENSE:						37,816.37	
MAINTENANCE OF EQUIPMENT							
62-2489-530010 SUPPLIES & OTHER EXPENSES							
SJE	3240	SJE	CD99627044	ALARM MONITORING SOFTWARE	07/27/2026	890.00	
Total MAINTENANCE OF EQUIPMENT:						890.00	
STORAGE & FACILITIES EXPENSE							
62-2891-530010 SUPPLIES & OTHER EXPENSES							
TOTAL ENERGY SYSTEMS L	85081	TOTAL ENERGY SYSTEMS LLC	INV166108	WELL 5 GENSET MAINT	07/20/2026	1,984.00	
TOTAL ENERGY SYSTEMS L	85081	TOTAL ENERGY SYSTEMS LLC	INV166109	WELL 4 GENSET MAINT	07/20/2026	1,984.00	
Total STORAGE & FACILITIES EXPENSE:						3,968.00	
MAINT OF MAINS							
62-2893-530010 SUPPLIES & OTHER EXPENSES							
CORE & MAIN LP	101721	CORE & MAIN LP	Z398854	WATER MAIN PARTS	07/20/2026	3,866.49	
Total MAINT OF MAINS:						3,866.49	
MAINT OF SERVICES							
62-2894-530010 SUPPLIES & OTHER EXPENSES							
SCHMITT CHALLENGES IN	103189	SCHMITT CHALLENGES INC	3783	CONC DISPOSAL	07/17/2026	168.00	
Total MAINT OF SERVICES:						168.00	
MAINT OF METERS							
62-2895-530010 SUPPLIES & OTHER EXPENSES							
L-R METER TESTING & REP	51145	L-R METER TESTING & REPAIR	5380	LARGE METER TESTING	05/29/2026	3,677.50	

Vendor Name	Merchant #	Merchant Name	Invoice Number	Description	Invoice Date	Net Invoice Amount	Period
Total MAINT OF METERS:						3,677.50	
MAINT OF HYDRANTS							
62-2896-530010 SUPPLIES & OTHER EXPENSES							
CORE & MAIN LP	101721	CORE & MAIN LP	Z385008	HYDRANT REPAIR KITS	07/16/2026	1,262.54	
CORE & MAIN LP	101721	CORE & MAIN LP	Z398854	HYDRANT	07/20/2026	4,862.00	
Total MAINT OF HYDRANTS:						6,124.54	
CLEARING ACCOUNTS							
62-3498-530010 SUPPLIES & OTHER EXPENSES							
O'REILLY AUTOMOTIVE IN	100281	O'REILLY AUTOMOTIVE INC	2199-302938	BATTERY	07/27/2026	180.88	
Total CLEARING ACCOUNTS:						180.88	
63-0000-550999 EQUIPMENT REPLACEMENT							
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	28722	CDBG GRANT ADMIN - FRONT/BE	05/13/2026	722.59	
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	31045	ENGINEERING - FRONT/BEAVER	07/17/2026	792.14	
SCOTT LAMERS CONSTRU	102656	SCOTT LAMERS CONSTRUCTION L	218309-1	CONSTRUCTION - 2026 LSL	07/29/2026	38,798.00	
SCOTT LAMERS CONSTRU	102656	SCOTT LAMERS CONSTRUCTION L	218309-2	CONSTRUCTION - 2026 LSL	07/29/2026	63,531.25	
Total :						103,843.98	
ADMINISTRATION							
63-3400-520045 ENGINEERING SERVICES							
APPLIED TECHNOLOGIES I	4882	APPLIED TECHNOLOGIES INC	38275	ENGINEERING, ADAPTIVE MANA	07/15/2026	924.00	
APPLIED TECHNOLOGIES I	4882	APPLIED TECHNOLOGIES INC	38277	ENGINEERING - OEI, ENERGY STU	07/15/2026	2,114.00	
63-3400-530010 SUPPLIES & OTHER EXPENSES							
METRO SALES INC	103445	METRO SALES INC	INV3145913	COPIER	07/27/2026	45.85	
63-3400-530130 MISC. EXPENSES							
BRIAN BEVERSDORF	103257	BRIAN BEVERSDORF	070826 EXPENSE	TRAINING/MILEAGE	07/08/2026	130.50	
Total ADMINISTRATION:						3,214.35	
GENERAL							
63-2600-530010 SUPPLIES & OTHER EXPENSES							
BADGER LABORATORIES I	102900	BADGER LABORATORIES INC	26-012328	SAMPLE ANALYSIS	07/14/2026	2,486.25	
ENVIRONMENTAL CONSU	100877	ENVIRONMENTAL CONSULTING	9658	REGULATORY TESTING	07/22/2026	2,100.00	
NILE XPEDITE SOLUTIONS	103133	NILE XPEDITE SOLUTIONS OF WIL	2391	SAMPLE TRANSPORTATION	07/22/2026	1,155.00	
63-2600-530016 CHLORINE							
HAWKINS INC	35111	HAWKINS INC	7499989	CHLORINE/SO2	07/17/2026	311.97	

Vendor Name	Merchant #	Merchant Name	Invoice Number	Description	Invoice Date	Net Invoice Amount	Period
63-2600-530111 FUEL							
UNITED COOPERATIVE	88122	UNITED COOPERATIVE	914112	FUEL - DYED DIESEL	07/27/2026	1,507.70	
63-2600-530112 LIFT STATIONS							
TOTAL ENERGY SYSTEMS L	85081	TOTAL ENERGY SYSTEMS LLC	INV166220	NORTH SIDE LS - GENSET MAINT	07/22/2026	1,984.00	
TOTAL ENERGY SYSTEMS L	85081	TOTAL ENERGY SYSTEMS LLC	INV166224	SOUTH SIDE LS - GENSET MAINT	07/22/2026	1,984.00	
TOTAL ENERGY SYSTEMS L	85081	TOTAL ENERGY SYSTEMS LLC	INV166354	WALMART LS GENSET MAINT	07/23/2026	1,429.00	
TOTAL ENERGY SYSTEMS L	85081	TOTAL ENERGY SYSTEMS LLC	INV166485	151 KELLOM RD LS GENSET MAINT	07/24/2026	1,488.00	
Total GENERAL:						14,445.92	
PLANT MAINTENANCE							
63-3087-530010 SUPPLIES & OTHER EXPENSES							
MENARDS - BEAVER DAM	99427	MENARDS - BEAVER DAM	96528	CLEANING SUPPLIES	06/02/2026	8.99	
MENARDS - BEAVER DAM	99427	MENARDS - BEAVER DAM	98153	MISC SUPPLIES	06/30/2026	162.82	
MENARDS - BEAVER DAM	99427	MENARDS - BEAVER DAM	98213	PUMP	07/01/2026	449.99	
MENARDS - BEAVER DAM	99427	MENARDS - BEAVER DAM	98677	MISC SUPPLIES	07/09/2026	94.20	
MENARDS - BEAVER DAM	99427	MENARDS - BEAVER DAM	98725	MISC SUPPLIES	07/10/2026	94.20	
Total PLANT MAINTENANCE:						810.20	
MAINTENANCE OF EQUIPMENT							
63-3089-530010 SUPPLIES & OTHER EXPENSES							
BASSETT MECHANICAL	101716	BASSETT MECHANICAL	330952	HVAC MAINT	07/16/2026	1,998.00	
PRO EDGE SHARPENING	103006	PRO EDGE SHARPENING	1819	SHARPEN BLADES	07/15/2026	30.00	
Total MAINTENANCE OF EQUIPMENT:						2,028.00	
MAINT OF MAINS							
63-3093-530010 SUPPLIES & OTHER EXPENSES							
GRAINGER	98906	GRAINGER	9004386349	MISC SUPPLIES	07/14/2026	30.49	
Total MAINT OF MAINS:						30.49	
64-0000-550999 EQUIPMENT REPLACEMENT							
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	28722	CDBG GRANT ADMIN - FRONT/BE	05/13/2026	230.01	
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	31045	ENGINEERING - FRONT/BEAVER	07/17/2026	252.16	
Total :						482.17	
STORM SYSTEM MASTER PLAN							
64-0550-530010 SUPPLIES & OTHER EXPENSES							
WISCONSIN DNR	98762	WISCONSIN DNR	26ESR07851	ENVIRONMENTAL FEE	05/19/2026	3,000.00	

Vendor Name	Merchant #	Merchant Name	Invoice Number	Description	Invoice Date	Net Invoice Amount	Period
Total STORM SYSTEM MASTER PLAN:						3,000.00	
ENGINEERING							
64-0553-520045 PROFESSIONAL SERVICES							
MSA PROFESSIONAL SERVI	57014	MSA PROFESSIONAL SERVICES IN	31178	GIS ADMIN	07/22/2026	184.00	
Total ENGINEERING:						184.00	
Grand Totals:						313,463.50	

TO THE COMMON COUNCIL OF THE CITY OF BEAVER DAM:

I submit the attached listing of invoices for your approval.

Kayla Larson
Finance Director

Unlocking Opportunities in Housing Supply

Beaver Dam, Wisconsin

City Council Briefing / August 3, 2026

Jolena Presti, Managing Director Development Advisory

Why housing matters in Beaver Dam

Housing is economic development, workforce development, and community development.

Council takeaway
Housing is a workforce, reinvestment and site-readiness issue.

Beaver Dam housing challenges

Recent market study findings point to a tight market, workforce constraints and reinvestment needs.

- 01 Tight rental supply**
Many comparable multifamily properties are near full occupancy with limited available units.
- 02 Housing limiting hiring**
Employer input indicates housing availability affects recruitment and retention.
- 03 Workforce housing gap**
Need for options serving middle-income households that often do not qualify for subsidy.
- 04 Older owned housing stock**
Aging owner-occupied homes create both production and reinvestment needs.

Why it matters

The housing conversation is not just about units. It connects directly to employers, neighborhoods and strategic growth.

ECONOMIC DEVELOPMENT	COMMUNITY DEVELOPMENT	IMPLEMENTATION FOCUS
Support employers - Housing options for workers at different income levels - Broader supply to attract and retain talent	Strengthen neighborhoods - Options for young families, seniors and workforce households - Reinvestment and broader rental/ownership choices	Grow strategically - Focus growth where infrastructure already exists - Use state and local tools to improve feasibility

The goal is not growth at any cost. The goal is more housing choices that support Beaver Dam’s workforce, neighborhoods and long-term community vision.

Wisconsin cities control the “speed levers”

Federal and state tools shape financing, but local systems often determine whether projects actually get built.

Council framing
Focus on what the city
can influence

01 Policy

Zoning, land use, density and code flexibility determine where housing is allowed and what form it can take.

02 Process

Permitting, plan review, pre-application coordination and staff capacity determine timing and reliability.

03 Capital

TIF, fee relief, local funds, infrastructure participation and gap financing determine feasibility.

04 Land + infrastructure

Public land, site readiness and CIP alignment convert planning priorities into buildable opportunities.

05 Partnerships

Developers, CDFIs, employers, nonprofits and utilities expand capacity and share implementation risk.

Core message: the city may not control interest rates or tax credit allocations, but it can reduce friction and improve predictability.

Creating More Housing Opportunities

Use zoning and development standards to create more housing opportunities without sacrificing community goals

Local Lever	What the City Can Do	Why It Matters
By-right / overlay districts	Allow compliant housing projects to move forward administratively	Reduces entitlement risk
Missing middle housing	Permit duplexes, fourplexes, townhomes, ADUs and small-lot homes	Adds attainable rental and ownership options
Density + parking flexibility	Trade added capacity or reduced parking for affordability/workforce outcomes	Improves project feasibility
Plan/zoning alignment	Use Act 173 “Truth in Planning” density planning requirements to align comp plans and zoning	Creates clearer expectations for developers

Prioritize housing growth in neighborhoods where infrastructure, market demand and community goals already align.

Reduce time, cost and uncertainty

A faster review process is an affordability strategy because delay adds carrying costs and financing risk.

01

People

Cross-departmental team; single project navigator; clear accountability

02

Policy

Code aligned with housing goals; by-right standards; flexible setbacks/parking

03

Process

Pre-app meetings; consolidated feedback; concurrent review; standard checklists

04

Technology

Digital intake, plan review, dashboards and communication tools

Immediate process wins

- Create a housing review team for qualifying projects
- Publish expected review durations and permitting benchmarks
- Hold pre-application meetings with planning, engineering, fire, utilities and finance
- Document agreements in a pre-app summary sheet

Wisconsin's housing toolkit

Recent state legislation adds practical tools cities can connect to local housing acceleration strategies.

Regulatory + process certainty

Act 68: signed to accelerate subdivision plat approvals and create greater certainty for developers.
Act 173: comprehensive plan density ranges and rezoning certainty when projects align with plans

Financing + gap support

Act 236: state LIHTC technical changes, including rural project reservation provisions
Act 237: changes to WHEDA revolving loan programs and ability to stack TIF and historic credits

Infrastructure tools

Act 235: Residential Tax Incremental Districts (RTID) for infrastructure necessary for residential development
Act 120: Neighborhood Improvement Districts (NIDs) allow property-owner supported financing for residential infrastructure improvements

Ownership + adaptive reuse

Act 239: workforce home revolving loan program for eligible buyers of new single-family homes
Act 238: historic rehabilitation tax credit changes that can support repair and conversion of historic structures

Adaptive Reuse Partnerships - The recent revolving loan program changes:

- Support mixed-use projects
- Support commercial-to-residential conversions
- Increase flexibility for redevelopment projects
- Increase maximum loan amounts available to projects

Activate land and infrastructure

Housing production accelerates when the city moves from “available land” to “ready sites.”

Site readiness filter

Infrastructure capacity	Water, sewer, stormwater, roads, transit
Zoning alignment	Density, housing type, parking, approvals
Land control + cost	Ownership, acquisition, title, disposition strategy
Environmental risk	Floodplain, brownfields, Phase I / remediation
Community benefit	Job access, schools, services, equity priorities

A 90-day action plan

Start with actions that improve predictability and build project momentum without waiting for a full plan rewrite.

Days 1–30

Inventory pipeline and barriers

Compile proposed sites, pending projects, zoning constraints, infrastructure gaps and permitting cycle times.

Days 31–60

Create the operating framework

Pick priority areas; draft a fast-track pathway; define incentive criteria and a scorecard.

Days 61–90

Launch pilots and partnerships

Hold developer roundtable; select 2–3 priority sites; align CIP/TIF/gap funding options; assign project navigators.

Expected outcome: a prioritized housing action framework with identified opportunity sites and implementation responsibilities.

Discussion

Which housing challenge is most limiting Beaver Dam's growth?

Which speed lever should the city prioritize first?

Should staff develop a 90-day housing action framework?

Thank you.

Jolena Presti, Managing Director
Baker Tilly Advisory Group, LP

The information provided here is of a general nature and is not intended to address the specific circumstances of any individual or entity. In specific circumstances, professional advice should be sought.

Align capital with community priorities

Incentives can help to close gaps, reward outcomes and support both rental and ownership production.

Tool	What it does	How it can support more housing units
Residential Tax Increment Districts (RTIDs)	Creates a separate type of tax incremental district focused on residential development. RTIDs are intended to support smaller homes on smaller lots and increase affordability through higher density. RTID proceeds may be used for the construction or improvement of infrastructure necessary for residential development.	Helps cities finance infrastructure needed to make workforce housing subdivisions, smaller-lot neighborhoods, and higher-density residential areas feasible.
Extended Affordable Housing TID Authority	Allows municipalities to extend the affordable housing TID extension from one year after TID closure to up to two years post-closure, if approved by resolution of the municipal governing body.	Gives cities additional time to use TID resources for affordable housing purposes after district closure.
Workforce Home Loan Program	Authorizes WHEDA to designate \$10 million from existing housing revolving loan programs to a new workforce home revolving loan program for eligible borrowers at no interest and no fee; the loan cannot be forgiven and is intended as gap financing for eligible buyers purchasing new single-family homes.	Supports attainable homeownership by helping eligible buyers close financing gaps for newly constructed single-family homes.
Commercial-to-Housing Incentives	Makes changes to housing revolving loan programs administered by WHEDA, including the Commercial-to-Housing Conversion Loan Program. The legislation was designed to reduce administrative burden and increase flexibility to convert vacant or underutilized properties into housing. It also allows tax incremental financing and historic tax credits to be stacked with housing loans.	Helps cities reposition vacant commercial buildings, mixed-use properties, downtown buildings, and underutilized sites into housing while layering multiple funding sources.

Proposal for a Classification, Compensation and Benefits Study for the City of Beaver Dam, Wisconsin

July 6, 2026



Prepared by:



Primary Contact for this Proposal:

James Battigaglia, President
7652 Sawmill Road, #295
Dublin, Ohio 43016

jimbattigaglia@archercompany.com

The City of Beaver Dam Classification, Compensation and Benefits Study

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Exhibits

Section 1. Cover Letter

July 6, 2026

The City of Beaver Dam
Attn: Vicky Orth, Human Resources Director
205 South Lincoln Avenue
Beaver Dam, WI 53916

email: vorth@ci.beaverdam.wi.gov

RE: Proposal for a Classification, Compensation and Benefits Study

Dear Ms. Orth:

The Archer Company is pleased to provide a proposal for the above-referenced study and requested services. The project work you seek is right at the core of the Archer Company.

Statement of Understanding

As we understand the project, the City of Beaver Dam will be selecting a consulting firm for a comprehensive classification, compensation and benefits study, to be completed in November of this year. We provide details on our approach, methodology and differentiators within the proposal. We believe we have a comprehensive, yet efficient approach that will meet *and exceed* your project expectations.

The Archer Company

The Archer Company has been conducting total rewards consulting studies and related services for utilities, as well as other local and state governments and quasi-government agencies, since 1987. Our proposed Project Director, Marianne Oyaas, manages projects in the SE region out of our Raleigh office. However, *Ms. Oyaas completed well over 100 municipal compensation studies within the state of Wisconsin*, before relocating to North Carolina about 10 years ago. In the last year Ms. Oyaas completed a very similar study with the City of Fond du Lac, and will present a similar study to the De Pere City Council in just a few weeks. She has also worked with Waukesha County and the City of Waukesha in the last few years, while employed with Segal Group. Ms. Oyaas has a 30+ year history working with cities, counties and other public sector organizations across the Midwest and Southeast regions, following a foundational experience in Wisconsin and Minnesota public sector human resources management.

The Archer Company, LLC is the flagship of a long-established consulting practice that began on the east coast over thirty-five years ago and soon spread through nationwide marketing and distribution efforts. Our company was established in for the sole purpose of providing federal, state, and local governments with award-winning, valid, and reliable human resource management systems. We are proud of our successes, which have led to an extensive list of satisfied clients. The Archer Company has been a profitable company in all the years of its existence, which is a testament to the high quality of services we provide as well as the loyalty we have experienced from many long-term clients. As of today's date, we have provided human resources services for more than 1,600 organizations.



The Archer Company is a limited liability company wholly owned (100%) by its principals. With headquarters in Columbus, Ohio, we have offices in Raleigh (North Carolina), Atlanta (Georgia), and Omaha (Nebraska), with additional staff in California, Virginia and Florida.

Corporate Address: 7652 Sawmill Road, Suite 295
Dublin, OH 43016

Office Phone: (614) 361-4998

Email: jimbattigaglia@archercompany.com

We have received the June 15th "Q&A" document from the City. As company president, I am able to affirmatively commit the firm to all of the terms of the City's RFP.

We have sufficient staff resources to commence work as soon you are ready. **We do not use contractors**, favoring the utilization of dedicated, full-time consulting staff. We keep our project portfolios small to ensure high quality and timely deliverables.

Thank you for your consideration of our proposal. Please feel free to contact me by letter, email, or phone should you have any questions or need any other information.

Sincerely,

Jim Battigaglia
President

Section 2. Executive Summary

A. Introduction

As we understand the project, the City of Beaver Dam, Wisconsin (“City”) is seeking a highly-qualified firm with extensive experience performing compensation and classification studies for Wisconsin municipalities and/or similar-sized local governments, to perform a comprehensive Classification, Compensation and Benefits and Study. The results of the study will support the City’s intent to provide a competitive, equitable and sustainable *total compensation program* for the City that supports its recruitment, retention, transparency, fiscal sustainability, fairness and organizational effectiveness objectives. This evaluation will review all key components of the compensation and total rewards program, delivering actionable recommendations to strengthen recruitment, retention, succession planning, and long-term workforce development. *While the City has had market surveys completed in the past, this study will be the City’s first comprehensive study of its kind.*

The City also wishes to have the Employee Handbook reviewed and updated to reflect any changes from the proposed study which could impact handbook content and key messages.

The proposed study will cover approximately 92 non-represented employees, currently assigned to 50-55 job titles (“classifications”). We also recognize, from many years of working in Wisconsin, that it is important to look at salaries paid to represented positions, to ensure there is adequate differentiation between the compensation provided to represented employees and their non-represented supervisors and managers, for example. The union wage scales represent an “internal labor market” which is as relevant to consider as is the external labor market.

At the highest level, the study will first focus on understanding the City’s Classification and Total Rewards Program and goals, and in the end, produce recommendations ensuring these related plans are meeting the City’s goals of market competitiveness, internal equity and legal compliance. And more broadly, the outcome of the study will result in classification and compensation plan adjustments which will strengthen, as necessary, the alignment between the plans and the City’s operational and human resources objectives, and in particular, the City total rewards philosophy. The study will also focus at the compensation policies and processes that support the actual compensation plan, to ensure the policies are strategically aligned with the operational goals and objectives of the City of Beaver Dam.

As we understand the RFP, the City has identified nine primary objectives for this study, each which are addressed in our integrated, phased, project approach:

Proposed Study Objectives



To meet the overall objectives identified by the City of Beaver Dam, we have created an integrated, phased project approach, with strategic input points (e.g., working sessions) to ensure the final recommendations and report are aligned with the City's specific needs. Also integral to project success, we will provide **weekly progress reports** to the Project Team, and a Draft Report of Findings and Recommendations no later than October 12th and a Final Report no later than November 9th. All findings and recommendations are to be captured in a project final report and presented to key stakeholder groups as defined in the City's RFP.

We have outlined a timeline of approximately 15 weeks (assuming we commence no later than Tuesday August 4, 2026), with project completion no later than Monday November 9th for the delivery of the Final Report. We are certainly open to timeline modifications, within reason, and would hope to have a detailed project timeline available to the City for approval following the initial Project Kick-Off meeting (week of August 3rd).

We agree to all terms and requirements issued by the City of Beaver Dam. We have sufficient staff resources to commence work as soon as the City is ready to begin, and we have provided what we think will be a successful timeline for completing the multi-pronged project within the City's time requirements.

B. Company Description, Ownership and Address

The Archer Company, LLC is the flagship of a long-established consulting practice that was established in **1987** for the sole purpose of providing federal, state, and local governments with

award-winning, valid, and reliable human resource management systems. As of today's date, we have provided human resources services for more than 1,600 organizations and have operated profitably and without legal challenge all of these years. We are recognized by public sector leaders and union leaders alike as a highly qualified and objective firm.

The Archer Company is a limited liability company wholly owned (100%) by its principals. With headquarters in Columbus, Ohio, we have offices in Raleigh, (North Carolina), Atlanta (Georgia), and Omaha (Nebraska), with additional staff in western North Carolina and Charlottesville (Virginia).

Corporate Address: 7652 Sawmill Road, Suite 295, Dublin, OH 43016

Primary Contact: Jim Battigaglia, President

Office Phone: (614) 891-7034

Email: jimbattigaglia@archercompany.com

The project will be managed from our Raleigh, North Carolina office, under the project direction of Marianne Oyaas, Regional Director.

Project Management Address: 8601 Caswell Court, Raleigh, NC 27613*

Project Director: Marianne Oyaas, Regional Director

Office Phone: (608) 698-0606

Email: marianneoyaas@archercompany.com

**Ms. Oyaas is relocating to Madison, WI in March, 2027.*

Section 3. Firm Qualifications

A. Qualifications and Service Areas

The Archer Company is a leading human resources consulting firm specializing in the development and implementation of compensation and classification systems for local government and public sector organizations of all types. Our seasoned team has broad experience and expertise *across all sectors* in the areas of:

• Job analysis and job evaluation	• Development of job architectures, classification structures, classification consolidation strategies, career ladders	• Salary, benefits and total compensation surveys and market analysis
• Review and development of compensation administration programs; current plan assessments	• FLSA compliance	• Performance management systems and management training
• Pay-for-performance programs linking contribution to rewards	• Bonus and incentive plan review and design	• Total compensation assessment and design
• Development of compensation philosophies at the organization level	• Review and development of Human Resources policies and processes	• Interactive cost modeling using user-friendly Excel models

What Sets The Archer Company Apart? First, while the solutions we offer our clients are progressive and linked to the challenges of today's labor market and economic environment, they are built on solid foundations that are logical, defensible, sustainable, and flexible. Second, our solutions and approaches are based on a solid understanding of each client as a separate entity - we do NOT offer cookie cutter approaches. Third, unlike some of our larger competitors who expect staff to manage 8-10 clients simultaneously, our approach is to *manage a much smaller number of client assignments at any one time*. Focusing on a small number of engagements allows our teams to concentrate on the needs of our clients more effectively and enables us to complete projects more quickly than you may find among larger firms. *We are focused, efficient, and highly effective in our approach to completing client assignments.* Fourth and we suspect uniquely, *the team assigned to collaborate with you on this project have worked together for over twenty (20) years*. Our senior team members both have chosen to engage with client organizations from the standpoint of a smaller firm, having worked in large firms in prior

years.

We have found it easier to provide truly customized, very personalized services from the vantage point of a smaller, highly focused consulting business.

Classification & Compensation Experience: Since our inception, The Archer Company has performed more than 1,600 classification and compensation studies in thirty-six states for union and nonunion utility organizations; cities and towns; airports and airport authorities; counties; state governments; school districts; housing authorities; colleges; other public agencies; and private organizations throughout the United States. The employee populations among our client organizations range in size from five to over 15,000 employees. Project budgets in past years have ranged from less than \$10,000 to \$475,000. Our clients utilize our expertise to review and audit their systems, design, and develop classification and compensation systems (pay plans, performance management, etc.), and/or obtain guidance when navigating unique compensation issues. These clients have contracted with The Archer Company to address innovative yet practical classification and compensation methodologies and to develop systems and policies that overcome the problems, or limitations, of traditional compensation systems.

Wisconsin Experience: Marianne Oyaas, proposed Project Director and Jim Battigaglia, President and Project Consultant have been providing classification and compensations services to Wisconsin cities and counties since 1993. Ms. Oyaas was located in Madison WI and managed the statewide public sector compensation consulting practice for three consulting companies: Maximus (1993-1999), Carlson Dettmann (2000-2004) and MRA (2005-2006). ***During those years she managed consulting engagements with over 40% of Wisconsin mid- and large-size cities and counties.***

After relocating to North Carolina several years ago, Ms. Oyaas continues to serve Wisconsin clients and plans to relocate to Madison in March of next year.

About Our Professionals: It takes experience to maintain the high level of service and to provide the results offered by The Archer Company. We utilize industry best practices in solutions design, ***provided by service professionals who have actually worked as local government managers*** and who, as a result of their experience, understand the practical implications of organizational change. We understand the public sector environment, its issues and concerns, the requirements of government leaders, and how to develop an equitable and defensible classification and compensation plan. Our professionals have the ability to effectively communicate and interact with employees at all levels of the organization, including elected officials, management, professionals, technicians, laborers, and public safety personnel. Team members have extensive knowledge and understanding of the various areas of local government from both managing government departments and from decades of experience providing consulting services. Thus, we are uniquely qualified and staffed to complete all of the tasks associated with a public sector engagement.

Our proposed team consists of Archer Company employees only – no subcontractors will be used on this project.

About Our Systems: The Archer Company utilizes a number of proprietary products in its classification and compensation work. They include the Archer Comprehensive Position Questionnaire, the Archer Matrix-Point-Factor Job Evaluation System, the Archer Total Compensation/Total Rewards Framework, the Archer Multi-Dimensional Performance Appraisal System, and the Archer Quality of Work Life Survey. *These products are the result of 27 years of research, and several have won an outstanding practitioner award given by the Society for Human Resource Management.* They were developed and copyrighted by Ernest R. Archer, Ph.D., the late President of The Archer Company. Even though they are based upon the complex mathematical relationships required for valid and defensible systems, all of our systems are easily administered and maintained. Because these systems also facilitate change, clients who adopted our systems years ago have been able to maintain sound, reliable human resource programs through their organizations' growth and the many recent changes in automation capabilities and government service obligations.

B. Benefits of the “Archer Approach”

We know how to work well with you: This project will be organized as a strategic partnership between the Archer Company and the City's Project Team. We see this as a true partnership but at the same time ensure that the City's time is respected and utilized for key purposes: providing Archer Company needed information and perspectives, evaluating options, and driving strategic decisions that impact our recommendations. Also, Archer Company consultants expect to work closely with Human Resources in order to ensure the success and long-term viability of the pay plan and to facilitate the implementation of our recommendations.

The Archer Company understands that this project is of significant importance to the City of Beaver Dam. All recommendations made during the study must be supported by objective analysis (data driven rationale) and valid methodologies in order to promote the credibility of the findings to both management and employees. While the Archer Company utilizes a systematic approach and methodology proven to provide reliable and objective findings to develop recommendations, our methods and report formats will be customized to meet the City's specific needs. We also understand that communication, perception and buy-in will play a key role in whether the plan will meet with success in this project. We recognize that any recommendations developed during this process must be perceived as fair and balanced by the employees represented in the plan.

Our Team is Seasoned and Well-Synergized: With The Archer Company, you will collaborate directly with our team of seasoned consultants who will lend their expertise in public sector (as well as all market sectors) compensation practices and principles appropriate to the City's unique situation and challenges. *The principals of The Archer Company (Jim Battigaglia and Marianne Oyaas) have been working together as a team for more than twenty years.*

The Archer Company Approach is Effective and Efficient and Leads to a Very High Rate of Plan Adoption: We attribute our long-term success with public employers all over the US, and the fact that so many of our clients have collaborated with us for at least a decade, on key aspects of our approach to client engagements:

1. **Relationship Management and Dedicated Project Director:** While The Archer Company utilizes a team approach in our work, every project is assigned a senior level Project Director who will manage the project and serve as the primary project liaison to the client. The Project Director, Marianne Oyaas, will be hands-on in the development of all recommendations. The workload of all of our consultants is balanced to ensure that they give their full attention to each task at hand and complete deliverables in a timely manner. Ms. Oyaas will be accountable to the City’s Project Team and be able to respond to any day-to-day needs and inquiries that arise.

2. **Quality Control and Solid Data Management Practices:** The team approach ensures that all work receives the scrutiny of a second set of eyes—even the work of our most experienced consultants is subject to review by the team to ensure the highest quality of service.

We handle a tremendous amount of data and information in a study of this size. In our nearly 40 years of experience performing this type of work we have honed processes and procedures for handling, organizing, and analyzing large volumes of electronic project data and information.

3. **Back-up Procedures:** The Archer Company is committed to exceptional customer service, which means that our clients should have open communication with and reasonable access to their assigned Project Director. In the unusual event that Ms. Oyaas should be out of contact for an extended period of time, members of the Project Team will be available to answer questions and address issues as needed. If at any time a client is unsatisfied with the level of service they receive, they may contact the president of the company directly for resolution of the problem.

4. **Client Communication and Coordination:** The Archer Company is committed to active communication and coordination with the City’s Project Team from Day One of the project engagement. There is rarely a surprise in the execution of an Archer study. *Our proposal describes a process we will complete with the Project Team to create and manage a study communication plan for all impacted City employees.* We also commit to weekly progress updates to the Contract Administrator, as well as the City’s Project Manager.

5. **Project Meetings:** The Archer Company will meet with the Project Team during strategic points of the study in order to seek their input and facilitate their review of key components and deliverables of the study. The Project Team, supplemented by other stakeholders as identified by the Project Team, will be asked to participate in the decision-making and review process.

Project meetings will be conducted virtually unless particular meetings require an on-site presence. *Initial kick-off meetings and employee orientations, department director*

QUALITY ASSURANCE

“Even the work of
our most
experienced
consultants is subject
to review by the
team to ensure the
highest quality of
service.”

interviews, initial and final meet-and-confer sessions, and final report presentations, at a minimum, will be held on-site.

C. Your Archer Team and Project Staffing

With The Archer Company, you will collaborate directly with a selected team of seasoned consultants who will lend their expertise in classification and compensation practices and principles appropriate to The City's unique situation and challenges. ***The principals of The Archer Company have been working together as a team for more than twenty years.***

We always utilize a team approach in our work to ensure overall consistency for our clients, and we have assembled a team of experienced professionals we believe will best provide the professional analysis and support needed for this project. The majority of the work on this project will be performed by our staff in Raleigh, North Carolina and Columbus, Ohio. Brief biographies of our key project consultants are provided below (Analysts will be assigned to support these consultants in accordance with need and availability).

Rivanna Authorities Proposed Project Team	
Marianne Oyaas Regional Director (Raleigh, NC Office)	Project Director: Ms. Oyaas will serve as the Project Director and will be responsible for the quality of all project deliverables, oversight of the construction of the classification and pay plan recommendations (job analysis, classification, and evaluation; pay policy review; compression and equity analysis; pay structure and pay plan implementation design; and total compensation market analysis) and the work of the Project Team.
Jim Battigaglia President	Senior Consultant: Mr. Battigaglia will serve as a Senior Consultant for this project contributing to several phases of the work plan including implementation costing scenarios, leveraging his experience as a County Finance Director and his significant public sector accounting experience.
Margaret Richwagen Consultant	Consultant: Ms. Richwagen will assist with reviewing market data (compensation, benefits, pay practices), analyses and recommendations, reviewing and making recommendations on salary administration policies, and will participate in the creation of interactive costing spreadsheets.
Amy Lee Compensation Analyst	Analyst: Ms. Lee will coordinate the Total Compensation Survey development, administration, peer support process, and data compilation. <i>Ms. Lee has a consistent track record of over 85% custom survey participant participation.</i>

Marianne Oyaas, MA, CCP • Regional Director

Ms. Oyaas has worked in total rewards consulting for over thirty years, with significant recent experience with a variety of public sector clients in the southeast region. Ms. Oyaas will serve as **Project Director**. Ms. Oyaas is based in Raleigh, North Carolina. She specializes in classification and compensation plan development, compensation assessments, job architecture, compensation philosophy creation, strategic plan implementations, performance appraisal systems and other human resource engagements.

Ms. Oyaas is a Total Rewards leader and strategist with broad and deep experience in both the public and private sectors, culminating in significant expertise in all areas of total rewards and employee recognition. Ms. Oyaas has extensive experience in developing, maintaining, and enhancing base, variable and executive plans for private, non-for-profit organizations and local governments. Her experience also includes market pricing, point-factor and other quantitative job evaluation and job pricing methodologies, best practices for incorporating custom peer surveys and published data to develop market consensus results, pay equity analyses and corrective strategies, management of HRIS systems and data/fiscal modeling, and design and administration of web-based survey sites. Ms. Oyaas has provided expert testimony in grievance and interest arbitration cases in the areas of job analysis, job evaluation, job classification and job documentation.

Ms. Oyaas has completed significant work in the areas of total rewards program design, pay equity, “living wage” programs and initiatives strengthening the link between performance contributions and pay rewards. She also works with Boards, Commissions, and leadership teams in developing compensation philosophies aimed at deepening the connection between employer and human resources objectives on one hand, and the pay delivery system offered by the employer on the other. Previous experience as a labor negotiator provides Ms. Oyaas with the “cred” to work with union organizations effectively.

Recently, Ms. Oyaas has managed a wide variety of client engagements involving the design of compensation and classification systems, based on comprehensive Total Rewards analyses, following approaches similar to those proposed for the City. These clients include (in the last few years):

(Clients marked with an asterisk were serviced during her tenure at Segal Consulting (2021-May, 2024). In these cases, Ms. Oyaas managed the client relationship and directed the project teams.)

Cities, Towns, Counties and School Districts

- Waukesha County (WI) *
- City of Fond du Lac (WI)
- City of De Pere (WI)
- City of Waukesha (WI) *
- Town of Nags Head (NC)
- Town of Carrboro (NC)
- Swain County (NC)

- City of Greenville (NC)
- Gaston County (NC)
- City of Asheville (NC)
- City of Laurens (SC)
- City of Manning (SC)
- City of Lancaster (SC)
- City of Simpsonville (SC)
- Town of Batesburg-Leesville (SC)
- Town of Mount Pleasant (SC)
- City of Fountain Inn (SC)
- City of Tega Cay (SC)
- City of Lexington (SC)
- Greenville County (SC)
- City of Union (SC)
- City of Gaffney (SC)
- City of Mount Dora (FL) (nearly complete)
- City of Sarasota (FL) (nearly complete; awaiting appointment of new City Manager to re-present our recommendations)
- City of Carrollton (GA)
- Fulton County (GA) *
- Bulloch County (GA)
- Stafford County (VA) – several projects *
- Albemarle County Public Schools (VA) *

Utilities and Water Management Districts

Ms. Oyaas has served enterprise fund utilities (as well as municipal-owned utilities) since the mid-1990s.

- Albemarle County Service Authority , VA – continue to provide ongoing job evaluation and other support as requested
- Prince William County Service Authority (VA) *
- Loudon Water (VA) *
- Greenville (NC) Utilities Commission (NC)
- The City of Asheville Water Resources (NC)
- Greenwood Commissioners of Public Works (SC) – continue to provide ongoing job evaluation and ongoing support as requested
- Suwannee River Water Management District (FL) – continue to provide ongoing job evaluation and other support as requested

Airport and Airport Authorities

- Sarasota-Manatee Airport Authority (FL)
- Raleigh-Durham Airport Authority – several projects (NC) *

- Fort Wayne-Alan County Airport Authority (IN)*
- Metro Knoxville Airport Authority (TN) *
- Gerald R. Ford International Airport (MI) *
- Morrisville Municipal Airport – Operated by DM Airports, Ltd. (NJ) *

Transit

- Pittsburgh Regional Transit (PA) *

In addition, Ms. Oyaas has conducted comprehensive compensation assessments (qualitative and quantitative audits) for a number of Higher Education institutions, and/or conducted a variety of compensation studies. These institutions include:

Higher Education *

- University of Chicago
- Michigan Technological University
- Western Michigan University
- University of Cincinnati
- Goucher College

Education and Other Experience: During the 1990s through the early 2000s, Ms. Oyaas directed multi-state consulting practices at MAXIMUS, Carlson Dettman Associates and MRA – the Management Association. During those years, about 80% of her clients were Wisconsin cities and other local government employers.

Most recently employed at Segal Consulting prior to rejoining the Archer team again in 2024, Ms. Oyaas provided similar services to those contained in this proposal to a number of cities, counties, school districts, airport authorities and higher education institutions. Earlier career experiences include creating Polk County, WI's first professional human resource function; classification, compensation, and selection testing management experience for the Minnesota Merit System (part of the State of Minnesota); and directing the compensation functions for three global Fortune 500 companies.

Ms. Oyaas is a recognized subject matter expert in job analysis, job classification, job evaluation and public sector compensation, having provided testimony in a number of interest arbitrations on this subject. She has provided numerous presentations to professional associations, particularly in the public sector, across the Midwest and Southeast.

She received a Master of Arts degree with honors in Industrial Relations from the University of Minnesota (concentration in Compensation) and a Bachelor of Arts degree in Psychology and Social Work (Phi Beta Kappa) from the University of St. Catherine in Minneapolis/St. Paul. Ms. Oyaas is a Certified Compensation Professional (CCP) as well as a member of WorldatWork, the Public Sector HR Association (PSHRA) and the Society for Human Resource Management (SHRM).

Jim Battigaglia • President

Mr. Battigaglia recently became the President of The Archer Company and will serve as a Senior Consultant for this project. Mr. Battigaglia is based in Columbus, Ohio. Mr. Battigaglia specializes in classification and compensation plan development, implementations, performance appraisal systems and other human resource engagements. Prior to his twenty years as a Principal at The Archer Company, Mr. Battigaglia served as the Director of MAXIMUS Human Resources and Organizational Development practice. Prior to that, Mr. Battigaglia served as a government consultant for KPMG and as the Director of Accounting for Montgomery County, Ohio.

Mr. Battigaglia specializes in classification and compensation system implementations, performance appraisal systems, training human resources and other staff in the utilization of the Archer Point Factor Matrix Job Evaluation System, and other human resource engagements. The majority of the projects managed by Mr. Battigaglia included job analysis, market analysis, classification structure design, job documentation, pay plan implementation design and pay plan implementation cost analysis.

Some clients for whom Mr. Battigaglia has designed compensation and classification systems, following approaches similar to those proposed for the City include: the cities of Newton, Sandy Springs and Griffin, Georgia; the City of Mount Pleasant, South Carolina; the City of Asheville, North Carolina; the cities of Carmel and Westfield, Indiana; the City of Beechwood, Cleveland Heights, Perrysburg, and Solon, Ohio; the City of Elgin, Illinois; Beaver, Butler, Centre, Indiana, Monroe, Cumberland, Mifflin, Snyder, Union, and Washington Counties, Pennsylvania; Cuyahoga, Franklin, Geauga, Lucas, Mahoning, Richland, and Wood counties in Ohio; the City of Manassas and the City of Newport News, Virginia; Franklin County Common Pleas Court, Municipal Court and Probate Court; Franklin County Prosecutor's Office and Public Defender's Office; Cuyahoga County Prosecutor's Office and Public Defender's Office; Cuyahoga County Board of Health; Cleveland Metroparks and Zoo, Ohio; Decatur, Fulton, Cobb, Henry, Newton, and Richmond/Augusta Counties, Georgia; Clayton County Water and Sewerage Authority, Georgia; McHenry County, Illinois; Greenville County, South Carolina; Charleston County Parks and Recreation Commission, South Carolina; Charlotte County, Florida; the City of Orangeburg and Orangeburg Utilities, South Carolina; Jefferson, Plaquemines, St. Bernard and St. Charles Parish, Louisiana.

Mr. Battigaglia provides pay plan maintenance services to numerous organizations including clients in Ohio, Louisiana, Pennsylvania, Michigan, Wisconsin, Minnesota, Tennessee, South Carolina, Georgia, and Massachusetts. He implemented performance appraisal systems at Cuyahoga County, Montgomery County Auditor's Office, Ohio, and the Butler Metropolitan Housing Authority.

Mr. Battigaglia received a Bachelor of Business Administration degree from Ohio University. He is a member of World at Work and holds the World at Work's Certified Compensation Professional (CCP) certification.

Margaret Richwagen • Consultant

Ms. Richwagen provides general human resources consulting services. She is located in Asheville,

North Carolina. She previously retired as the Human Resources Assistant Director at DeKalb County, Georgia (a large Atlanta metro county). In this capacity, Ms. Richwagen managed numerous human resource programs for the County including the compensation and classification plan (which was, coincidentally, created by the Archer Company). She has a master's degree from Michigan State University and a bachelor's degree from the University of Michigan. Ms. Richwagen holds the SHRM senior level certification. She will participate in the development of deliverables, recommendations and costing documents for multiple areas within the project.

D. Client List

In our thirty-five plus years of operation, we have had the privilege to assist over 1,600 cities, counties, utilities, school districts, colleges, and other public agencies with their compensation challenges and needs. These clients utilized our services to address innovative yet practical compensation methodologies and to develop systems and policies that overcome the problems, or limitations, of traditional compensation systems.

Local government compensation studies require a disciplined, valid, and reliable approach that will defend our clients and our own company against legal challenge, and equally importantly, will instill confidence in our results and recommendations. *Pay is a very emotional subject for employees in all organizations, and the public nature of public sector pay requires additional sensitivities and a very high level of professionalism in the conduct of our work.*

The Archer Company has an extensive list of public-sector clients both nationally and in the Southeast. Many of our clients represent long-term relationships with clients who collaborate with us annually or every other year to evaluate new and changed jobs, provide recommendations for wage increase and/or structure budgets, or to perform other ad-hoc studies and services. Our first reference, DeKalb County, GA, is one such reference.

In over thirty years The Archer Company has never received an informal or formal legal challenge. Our adoption rate is close to 100%. We listen hard and make sure we understand the objectives and priorities of our client organizations.

CLASSIFICATION AND COMPENSATION CLIENTS

In this section, we are listing The Archer Company clients f have provided similar classification, compensation and total rewards studies in the last 5-8 years:

CITIES/TOWNS

- Albany, GA
- Alexandria, LA
- Asheville, NC
- Batesburg-Leesville, SC
- Beachwood, OH
- Cape Coral, FL
- Carrboro, NC

- Carmel, IN
- Christiansburg, VA
- Clinton, NC
- Covington, GA
- Darlington, SC
- Deltona, FL
- De Pere, WI
- Downers Grove, IL
- Dunedin, FL
- Easley, SC
- Elgin, IL
- Fond du Lac, WI
- Fort Mill, SC
- Fountain Inn, SC
- Franklin, NC
- Covington, GA
- Gaffney, SC
- Glendale Heights, IL
- Griffin, GA
- Hapeville, GA
- Hartsville, SC
- Irmo, SC
- Kenner, LA
- Laurens, SC
- Lancaster, SC
- Lexington, SC
- Lyman, SC
- Kennesaw, GA
- Lombard, IL
- Lyman, SC
- Manassas, VA
- Manning, SC
- McDonough, GA
- Morrow, GA
- Manning, SC
- Mount Pleasant, SC
- Mount Dora, FL
- Nags Head, NC

- Newport News, VA
- North Augusta, SC
- Orangeburg, SC
- Ottawa, OH
- Pekin, IL
- Raymore, KS
- Reston, VA
- Richmond Hill, GA
- Ridgeville, GA
- Santee, SC
- Sarasota, FL (Draft Final Report issued; City awaiting selection of City Manager)
- Simpsonville, SC
- Smyrna, GA
- Solon, OH
- Tega Kay, SC
- Truckee, CA
- Union, SC
- Westfield, IN
- Westlake, OH
- Winnsboro, SC
- Wisconsin Rapids, WI

COUNTIES

- Augusta/Richland County, GA
- Beaver County, PA
- Bibb County, GA
- Bulloch County, GA
- Butler County, PA
- Centre County, PA
- Chatham County, GA
- Charlotte County, FL
- Cheatham County, TN
- Clark County, OH
- Cobb County, GA
- Cuyahoga County, OH
- Cuyahoga County Auditor's Office, OH
- Cuyahoga Coroner's Office, OH
- Cuyahoga County Data Center, OH
- Cuyahoga Planning Commission, OH

- Cuyahoga Prosecutor's Office, OH
- Cuyahoga Public Defender, OH
- Cuyahoga County Recorder's Office, OH
- Cuyahoga County Sheriff's Office, OH
- Cuyahoga Soil & Water Conservation District, OH
- Dawson County, GA
- DeKalb County, GA
- Douglas County, NV
- Edgefield County, SC
- Fairfield County, SC
- Forsyth County, GA
- Franklin County, OH
- Franklin County Auditor's Office, OH
- Franklin County Common Pleas Court, OH
- Franklin County Coroner's Office, OH
- Franklin County Data Center, OH
- Franklin County Municipal Court, OH
- Franklin County Probate Court, OH
- Franklin County Prosecutor's Office, OH
- Franklin County Public Defender's Office, OH
- Fulton County, GA
- Geauga County, OH
- Geauga County JFS, OH
- Greenville County, SC
- Henry County, GA
- Iberia Parish, LA
- Indiana County, PA
- Jackson County, GA
- Jefferson Parish, LA
- Lee County, FL
- Lee County, GA
- Lyon County, MN
- McHenry County, IL
- Monroe County, PA
- Newton County, GA
- Pender County, NC
- Pickens County, SC
- Plaquemines Parish, LA

- Polk County, FL
- Snyder County, PA
- Solon, OH
- Spalding County, GA
- St. Bernard Parish, LA
- St. Charles Parish, LA
- Stanislaus County Courts, CA
- Stutsman County, ND
- Swain County, NC
- Taylor County, WI
- Union County, PA
- Washington County, PA
- Wayne Township, IN
- Wood County, OH
- Wood County Engineer, OH

UTILITIES, AUTHORITIES AND SPECIAL DISTRICTS

- Albemarle County Service Authority, VA
- Albany Gas & Electric, GA
- Allen County Health District, OH
- Appomattox Water Authority, VA
- Cleveland Municipal Court, OH
- Cleveland Municipal Court Clerk of Courts, OH
- Cuyahoga County Board of Elections, OH
- Charleston Parks & Recreation, SC
- Charleston Airport Authority, SC
- Clayton County Water Authority, GA
- Cleveland Metroparks and Zoo, OH
- Cuyahoga County Board of Health, OH
- Cuyahoga County Personnel Review Commission, OH
- Dayton Municipal Court, OH
- Daphne Utilities, AL
- Denver Housing Authority, CO
- Florida Keys Aqueduct Authority, FL
- Franklin ADAMH Board, OH
- Fulton County Board of Health, OH
- Greater Cleveland Council for Employment Opportunities, OH
- Greenwood Commissioners of Public Works, SC

- Huron-Clinton Metro Parks, MI
- Lee County Airport, FL
- Louisiana Department of Recreation & Tourism, LA
- Low Country Council of Governments, SC (numerous projects)
- Orange Beach Water Authority, AL
- Orangeburg Department of Public Utilities, SC
- Peace River Manasota Water Authority, FL
- Pennsylvania Association of Counties, PA
- Regional Income Tax Agency, OH
- Sarasota-Manatee Airport Authority, FL
- Suwannee River Water Management District, FL
- Summit County DD Board, OH
- Tampa Bay Water Authority, FL
- Toledo Metroparks, OH
- Wayne Township, IN
- Winston-Salem Housing Authority, NC
- Wood County DD Board, OH
- Wood County Board of Health, OH
- Wood County Park District, OH

Section 4. Project Approach and Methodology

A. Introduction

The City of Beaver Dam, Wisconsin (“City”) is seeking proposals from qualified consulting firms to conduct a comprehensive employee classification, compensation, and benefits study. The City’s objective is to develop a competitive, equitable, and sustainable total compensation program that enhances recruitment, drives retention, and supports overall organizational effectiveness.

The study includes approximately 92 non-represented employees that are currently assigned to approximately 50-55 classification titles.

B. Areas of Service and Deliverables

From our understanding of the RFP and the June 15th “Q&A” Memo issued by the City, we have identified sixteen (16) objectives and key area areas of service and/or deliverables to be addressed in this study. The objectives, which will be incorporated into the eleven (11) project phases, are summarized below:

One. Complete a Comprehensive “Current State Assessment” of the City’s current Classification and Compensation System – The assessment is inclusive of policies, pay structures, and key “class and comp” practices. We have a specific objective below covering review of “class and comp” policies. The current state assessment is accomplished by several means:

- Review of all documents (policy and process documents, job descriptions, pay structures, etc.)
- Working sessions on the policies and practices supporting the Classification and Compensation Plans
- Input on the same areas from Department Directors.

We will identify strengths and areas of opportunity (if any) in a sub-report on the “current state” assessment, and findings will flow into other work described in the objectives below.

Two. Ensure Internal Pay Equity – Through thorough job analysis and job evaluation as well as a wholistic review of the City’s Job Classification and Compensation Plan, we will partner with the City to optimize the Classification Structure as well as appropriate pay grade assignment for each identified City job classification. Each job will be studied both from an “internal worth” standpoint, using our proprietary point factor job evaluation system, and from an “external” worth standpoint via our custom market assessment – to ensure the final classification assignment and corresponding pay grade and range is both internally equitable and market competitive.

We will ensure that the final grade assignments for each class title reflects true *internal equity*. Consistency and equity within the Job Classification System is critical

so that jobs that perform similar functions are provided similar pay opportunities. Equity within the Compensation Plan is assured by determining the appropriate pay grade for each job classification identified in the study.

Another form of *pay equity* refers to appropriate placement of each employee within their assigned pay grade and range. We will conduct a thorough analysis to identify both policy/practice issues that can lead to pay compression as well as actual current instances of pay compression. From this analysis, we will recommend policy changes and actual pay adjustments as necessary to remediate the compression issues we may uncover.

Three. Classification Plan Optimization – The intent of this deliverable is to analyze the current Classification Plan including policies, processes for administration and the classification structure itself. Related to objective One above, and equally as important, we want to ensure, through the job analysis and evaluation process, that the optimal number of job/classification titles are established and clearly described, and that each position is appropriately assigned to the correct classification title. We will also apply “titling guidelines,” reviewed with the Project Team, to ensure consistency in the use of titles that imply levels, e.g., “lead,” “supervisor,” “manager” and director.”

In terms of policies and processes, we will review and make recommendations regarding The City’s processes to establish classifications, complete classification reviews and reclassification requests, and any other policies or processes that effect the efficient and logical administration of The City’s Job Classification Plan.

Four. Create the Optimal Market Position for “Total Rewards” – Through facilitated working sessions with key stakeholders, we will explore options and implications of different market positions for all aspects of total rewards (otherwise known as “total compensation”), as well as the best way to operationalize a certain market position given the complexity of “total rewards.” The result will be recommendations around base salaries, benefits and other components of total rewards that will align with the City’s chosen market position. In working sessions, we will explore the City’s current desired “market position” (e.g., pay at “market average,” “lead market” or “lag market”) and if requested, we can explore options and implications of different market positions, should the City wish to consider alternate market positions. Once the market data is compiled and the reports completed, we will understand the full costs of continuing to position the pay structure at the current market position, and we will be able to cost out alternatives for different positions/percentiles that the City may wish to consider.

As part of this deliverable, we will need to fully understand how the City has historically operationalized its current market position, including *whether the market position includes base salaries as well as benefit contributions made by the City as the employer, or rather is based on benchmarking results with respect to base salaries alone.*

The focus of this phase is inclusive of all elements of “total compensation” or “total rewards” including salary expenditures, benefits expenditures, and other related compensation and rewards such as bonuses and incentives, performance awards and other recognition programs, and stipends.

Five. Through a Custom Survey Process, Understand Current Market Competitiveness for Base Pay Ranges and Key Compensation Policies and Practices – To ensure the City provides competitive compensation in the marketplace, we will design and execute a highly customized market assessment process, guided by the City’s Compensation Philosophy and compensation program objectives.

Major design decisions are made around defining the “peer” organizations, choosing the appropriate “benchmark” jobs that represent the range of jobs in the City, and determination of the targeted pay policies and practices areas around which the City’s wants to understand market trends and practices. Given the size of the study population, we expect to survey all non-represented classification/job titles.

The market competitiveness review includes understanding the market demands at all key points along the pay range:

- Minimums - For hiring purposes
- Midpoint/Market Control Points - Ensuring they are fully competitive at the market position desired by the City’s (e.g., “at market,” “above market”) and
- Maximums - Ensuring appropriate salary growth is possible given the desire to retain trained, seasoned employees over the long run
- True Hiring Ranges - Particularly in public safety/sworn roles (including management jobs), we recommend specifically also surveying hiring rates or ranges (which increasingly we find are “higher” than the stated Range Minimum rates). The intent here is to ensure we understand the true hiring rates and ranges being offered among the peers that the City identifies as comprising its “labor market.”

Please see **Exhibit 1** for a partial example of a Benchmark Job Survey Summary Report we recently produced.

Six. Review of the Competitiveness of the City’s Total Rewards Offerings – The Archer Company will work with the Project Team to understand and assess all benefit offerings in place as well as all elements of the City’s *total rewards program*. We will assess market competitive benefits and other elements of total rewards practices in the relevant labor market, resulting in specific recommendations around benefits and other elements of “total rewards” that will align the City’s plans and programs to competitive practices. A highly customized Total Rewards survey will ensure we provide the City with sufficient market information on benefits, other aspects of monetary and non-monetary rewards, as well as direct compensation, from the defined market with whom the City competes for talent.

Please see **Exhibit 2** for a partial example of a custom Pay Practices and Benefits survey we recently prepared (available online or through a fillable Word document) and **Exhibit 3** for a partial example of a Pay Practices and Benefits Survey Results Report. *These reports are highly customized to meet the needs of our individual clients.*

Seven. FLSA Compliance – From the job analysis, evaluation, and classification phase we will have the right information to determine the appropriate classification of each job role as exempt or non-exempt under the federal Fair Labor Standards Act.

Eight. Update/Create a Uniform Set of Job/Classification Descriptions – As a result of our job analysis and classification work, should we find that job descriptions need updating and/or need to be added (e.g., establishment of a new job title), we will update job descriptions as necessary.

Nine. Provide a Set of Recommendations to Ensure Market Competitiveness of the Pay Structure and Benefits Program – From the market assessment and our deep experience in public sector compensation programs, we will deliver a comprehensive set of recommendations aimed at preserving The City’s desired level of competitiveness for its pay structure as well as the Benefits Program.

If we find the current pay structure, overall or in the case of one or more job classifications or job families is not competitive, we will give specific recommendations in terms of changes or enhancements that will align the pay structure and individual classification pay grade assignments to the market at the level at which The City’s wishes to compete.

The structure development also includes several key “design” decisions that should link to The City’s compensation objectives, such as range width, amount of time it takes the employee to reach a fully competitive rate, and the method(s) by which employees will progress through pay ranges (e.g., time in job, merit, etc.).

With respect to the City’s Benefits Program, we will make specific recommendations regarding specific benefit categories, employer contribution levels and other components that are important for judging the competitiveness of the benefits offerings, and the “total compensation” package offered by the City at this time.

Ten. Review and Recommendations on Job Classification and Compensation Policies – This objective, which will be one of the project phases, constitutes a thorough review of all of The City’s Classification and Compensation policies and key practices. We believe that even the most solid and defensible classification and compensation plan will fall far short of effectiveness without sufficient, and carefully-considered classification and compensation policies. The classification policies should address such topics as the classification of new positions and job reclassification. The compensation policies should address all “compensation events” including compensation philosophy; hiring salaries; pay progression; promotions, demotions and transfer pay; temporary/acting assignments; salary structure adjustments and a

number of others. We will also review The City's pay for performance initiatives and/or programs, skill pay, special assignment pay, certification pay and any other pay programs that supplement the base pay program. Particular attention will be paid to the area of "starting pay" determination, and options and impacts for "crediting" employees for job knowledge and experience in the determination of the appropriate starting salary.

In this phase, we will utilize market practice information, the City's compensation philosophy objectives and our deep experience in order to analyze current "class and comp" administration policies and recommend additions and/or modifications to better align with The City's human resources objectives.

Employee Handbook Review: We will also draft edits as needed to ensure that the current Employee Handbook is updated to reflect the results of the classification, compensation and benefits study and approved changes to these programs.

Eleven. Development of a New Pay Structure - We use regression analysis to draw a "pay line" based on the integration of market data and job evaluation points from the application of our trademarked job evaluation system, the Archer Matrix Point Factor Evaluation System, to each final job classification identified in the study. This methodology ensures an internally equitable grade structure coupled with market-competitive pay ranges. We build ranges (Minimums, Midpoints, Maximums, desired range width and Range Midpoint differentials) based on several elements that will be defined in the development of Compensation Philosophy, including:

1. Desired level of hiring competitiveness
2. Desired Maximum Pay versus market pay levels
3. The way in which employees move through pay ranges and the link to performance (e.g., use of "open ranges" versus pay steps; role of length of time in job versus performance versus other factors)
4. The point of time in a job at which the City believes the employees should receive a fully competitive wage or salary
5. Any formal or informal commitment the City may have to paying a "living wage" so that in effect that wage becomes a floor for the lowest grade of the structure, and we ensure that no actual wage is below the targeted "living wage"

Based on market data and discussions with the Project Team, the pay structure or structures will reflect the final decision on market position, e.g., aligning the structure to "market average" or "50th percentile" or perhaps another chosen percentile in an effort to "lead" or "lag" the market.

Twelve. Complete an Equity Review and Compression Analysis, Recommend Remediation Strategies with Estimated Costs – Through a thorough diagnosis of the types of level of inequities present in the current pay plan, we will identify a series of recommendations including potential grade and even individual pay adjustments that

will minimize identified inequities *including* pay compression.

First, we will work with the Project Team to identify the type or type(s) of inequities including compression issues occurring in the City and from that identification process, we will gather the data required from the City, complete the data analysis, and provide recommendations to rectify the specific compression occurring at the City. We will provide cost estimates to accompany our recommendations.

A **pay equity review** includes a focused analysis of current salaries within job titles and grades, identifying “outliers” – rate differences which can’t be explained by legally-permissible factors including time in job; related education and experience; special skills; and (although it is sometimes a compliance issue), job performance. We will identify such outliers, in the context of the recommended ranges and rates for each job and provide remediation recommendations – on a per position basis.

Compression analysis centers around the type of pay compression in the salary plan. For example, if the compression is due to high base/overtime earnings of union and/or non-union subordinates compared to the earnings of their exempt supervisors/managers, we need to complete a total earnings analysis of all supervisor/managers and each of their subordinates. Or, if the compression is actually a disconnect between current pay within a range and time in the job (i.e., “newer” employees are earning too close to or more than more “senior” employees), a different analysis is required. *We want to make sure we solve the right issue.*

Thirteen. Create an Implementation Plan – By fully understanding all results from the internal and external analysis, by learning the City’s objectives, priorities, and pain points, we will develop an *interactive Excel model that will allow the modeling of potential costs under 3-4 scenarios* aligned with the City’s fiscal assets and specific objectives and priorities.

At least one implementation option will utilize a gap analysis comparing current and target compa-ratios. Target ratios can be customized based on time-in-position and, if preferred by the City, performance outcomes. This highly flexible approach is particularly effective at mitigating pay compression.

The implementation plan will also articulate ***other compensation plan recommendations outside of the pay structure implementation***, such as the creation or change of certain pay “add ons” or practices that we believe should be added, enhanced or in some cases eliminated.

Fourteen. Provide a Plan for Maintaining Ongoing Successful Administration of the Classification and Compensation Program - This includes specific strategies for monitoring market position, inflation, compression, and internal equity annually and a series of steps to take once the analysis of said factors is complete. These steps would include the appropriate considerations to take, and supporting data to use, to determine periodic pay structure adjustments and the budget amount for the annual pay increase program.

Fifteen. Communication and Education – Through the development of a comprehensive communication plan, ensure project stakeholders are appropriately informed and updated about the project, including results and recommendations. Here are some key elements of our activities for this important objective:

- At **Day One**, we will develop a detailed project plan with milestone dates and administer the plan to The City's expectations.
- We will meet with the Project Team, Human Resources Director and Department Directors as the study commences to ensure full understanding of who we are, as well as our processes and methodologies.
- We will also be meeting with each Department Director to understand their specific compensation and classification concerns, any issues with hiring and retention, any FLSA concerns, as part of our job analysis process.
- We will be happy to draft project update website postings and/or emails to communicate at key points during the project.
- We will also work with the Project Team to format individual impact emails that articulate any changes to job title, pay grade and range, and FLSA classification (if applicable).
- As the project end draws near, we will create letters and other necessary employee communication templates for sharing study results with employees, including a draft individual letter or email explaining any actual changes to classification, job title and/or pay grade.
- Finally, as the study is completed, we will be prepared to present study findings and recommendations in the form of a draft and final report, and presentations as indicated in the RFP and including a meet and confer session with each of the three union groups that are within the scope of the study.

Sixteen. Ongoing Support – *We are committed to set up The City for success. In order to do this, we provide up to 20 hours of ad-hoc, as-needed project support for one year following the issuance report – at no charge to The City.*

These hours could be used to:

1. Discuss the implementation of pay policy changes and/or changes in pay practices resulting from Archer recommendations
2. Create an annual "compensation calendar" to plot out the timing and communication of key compensation events including but not limited to: determination of pay structure changes (generally annually), determination of individual pay increase budgets (e.g., across-the-board increases), and if there is a pay-for-performance program in place, ensure optimal timing of the performance assessment and performance award determination processes
3. Analyze, evaluate and recommend a pay grade for new and substantially-

changed positions

4. Any other use deemed necessary by the City, during the first year following project completion. This can include consultation on implementation, individual pay issues that might arise, FLSA questions, and anything that falls within the purview of the City's classification and compensation plan, and our recommendations.

C. Detailed Description of Project Phases

The Archer Company intends to focus our approach to ensure an alignment of the recommendations and all deliverables to the City's Compensation Philosophy, human resources strategy, and strategic and operational objectives.

As each client is unique and faces its own set of challenges and opportunities, The Archer Company stresses fact-finding, due diligence, and information-gathering from **Day One**, in order to ensure our efforts and outcomes will be of optimal value to our clients.

For this project, we have organized our proposed work in eleven phases. Each phase has multiple tasks, and there are dependencies between multiple tasks within several phases. We have worked out a proposed project plan to meet these requirements.

The Archer Company has put together a project plan to complete all services in 15 weeks total. We think the proposed cadence of project activities is optimal given the large scope of the project, however **we note that the timeline is "assertive" and will require the City to agree to several key meeting dates and feedback review timeframes early in the study.**

If selected, we will focus during Week One with the Project Team, to create a mutually-agreeable work plan with weekly timeline, and the identification of key dates. The project plan will be created and managed by The Archer Company Project Director.

Phase One: Project Initiation and Planning

This phase includes relevant data-gathering, kick-off meetings, employee orientation sessions, and agreement on project plan, objectives, and study steps.

Discussions are held with the City's Project Team to discuss expectations, gather information, and plan project implementation. The Archer Company will work with the Project Team and appropriate staff to obtain clarification regarding the City's organizational structure, the current classification and compensation plan, compensation concerns, expectations of study results, and other relevant matters. During this time, we will also collect relevant data and information and solidify the project timeline and mutual accountabilities. The following tasks are expected to take place as part of Phase One:

- A. **Project Plan:** The Archer Company will finalize a specific project plan for the City that outlines every task to be completed and due dates for key milestones and deliverables.
- B. **Initial Kick-Off and Subsequent Project Meetings (On-Site):** The Archer Company will conduct meetings with the Project Team at key points during the project timeframe. We

are open to periodic meeting with the top leaders at a cadence requested by the group, as well.

initially we will focus on the overall goals and objectives for the study, as well as specific concerns, from the perspective of top leadership within the organization. We want to make sure our approach and methodology are in alignment with the needs of this leadership team. The initial meeting will also focus on the following objectives:

1. Gain a full understanding of the City's human resources department mission, vision, and values. To the extent the City has a firm compensation philosophy we will review its tenets as well
2. Clarify stakeholders' expectations of the process and deliverables
3. Agree to specific project timeframe
4. Identification of roles and responsibilities
5. Review key working session dates and interim report deliverable dates, per our proposed timeline, and finalize timeline specifics
6. Finalize budget and deliverables

We will also work with the Project Team to gather data and information we will need to conduct the study. A data request form will be sent out to the City immediately upon contract execution.

- C. **Meeting with Department Directors and Group Orientations:** If it would be helpful, we are happy to also meet with Department Directors in order to introduce our firm, the team, and our background. Also important is to preview the study timeline, phases, and ways in which their input will be gathered and be important to the success of the study.
- D. **Group Employee Orientation Sessions:** We will conduct up to three employee orientation and CPQ training sessions while on site for the Kick-Off meetings, and sessions can be recorded for the City's use.

The intent of the orientation sessions is to introduce our company, walk through the project objectives and timeline, and ensure employees are well-versed on the scope of the work, assuring them that certain tasks (such as organizational staffing review) are not in scope.

Equally important, we will also walk through the Comprehensive Position Questionnaire we use for job analysis/evaluation/classification purposes in order to provide useful training and "tips and tricks" for questionnaire completion.

- E. **Review the Current Classification and Compensation System (as a prelude to the formal assessment in Phase Two):** In working sessions with the Project Team, The Archer Company will review the City's current classification plan and all aspects of its pay delivery system, to ensure we have a full understanding of the "current state" of the City's Classification and Compensation Plan (*including challenges, pain points and opportunities*).

As part of this task, we will review all identified job families, job series, career ladders and pay progression plans/policies that may exist at present to establish a baseline and understand the “current state.”

We also want to understand leaderships’ views on the extent to which the current Classification Plan meets the City’s needs to support growth and change. Some of this input will occur at this stage and more through department director interview in **Phase Three**.

- F. **Review the Current Organizational Structure and Reporting Relationships:** The Archer Company will review organizational charts, job descriptions, assignment of functions, and job titles for each department.

Phase Two: Compensation Plan Current State Assessment

In this phase, we perform a qualitative and quantitative assessment of the key components of the current Compensation Plan.

The intent of this phase is to thoroughly understand, through reading and discussion with the Project Team, the Compensation and Benefits Plan components including underlying assumptions, policies, key processes, and other components (structures and structure design, for example).

The assessment includes two to three working sessions to understand what is working about the Compensation and Benefits, what is not working and what could work better. Through focused working sessions, we will gain a much deeper understanding of the “current state” of the compensation plan itself, which, with market data we will be gathering and our strong knowledge of public sector compensation practices, will inform recommendations about the compensation plan itself.

Topics in the working sessions will include:

1. The City’s ability to recruit and retain: turnover statistics, areas of specific concern
2. Pay increases within current job assignments: how does pay grow over time
 - a. Role of performance, longevity, and other factors
 - b. Is the City interested in different ways to provide pay growth opportunities, such as strengthening “pay-for-performance”?
3. Key policies for “compensation events” include pay for new hires, promotions, demotions, etc., reclassifications, etc.
4. How the Classification Plan and Compensation Plan are integrated through policy and practice.
5. The extent to which internal equity) is of importance, versus the role of market competitiveness. *We believe our methodology integrates both methods of value well and we assume we will be evaluating each classification with our job evaluation system.*

6. The extent to which performance is part of the compensation plan and if so, how performance is measured and how pay is impacted by the City's Performance Management Program (if at all)
7. The City's view of the Benefits Program as part of the "total compensation" offerings at the City and to what extent the City wishes to consider true benefits program changes if the market data supports such changes
8. Policies and processes used by the City to maintain pay range competitiveness
9. Policies and processes used to determine general or "across the board" increases
10. Other pay programs and policies in place and/or perceived as lacking or insufficient), including, but not limited to:
 - a. On-call and call-in pay
 - b. Shift differentials, wage differentials and other pay "add-ons"
 - c. Skill pay
 - d. FLSA compliance and overtime compensation for non-exempt employees
 - e. Managing base pay for employees at or near Range Maximum
 - f. Certification pay
 - g. Bilingual pay
 - h. Acting assignment/Interim pay
 - i. Overall, ensuring consistency with the City's Compensation Philosophy and Objectives

The results of the working sessions and "current state" analysis, combined with market findings and our consulting experience, will be a set of recommendations to better align the compensation plan and policies to the needs and objectives of the City.

Phase Three: Job Analysis, Evaluation, Classification and Job Documentation

The intent of this phase is to analyze each existing classification and apply sound job evaluation processes to gauge the strengths and any inconsistencies within the City's Classification Plan. Granular data is collected by use of our comprehensive position questionnaires (CPQs), so that we can deeply understand each classification for the purposes of job analysis, complete job evaluation and complete market benchmarking and FLSA analysis.

To ensure that positions performing similar work are paid in similar pay grades, and to ensure FLSA compliance and a quality market study, current job information is really important.

The questionnaires, supplemented by department director interviews and review of organization charts, are analyzed to fully understand each specific role that is present at the City and through that understanding clearly outline promotional opportunities to provide one form of compensation growth opportunity. This step includes several crucial activities.

The Archer Company will establish internal equity in the pay plan by conducting a job analysis of every Authorities position, ensuring a logical and internally equitable classification structure and plan, and evaluating classifications using our copyrighted point factor evaluation system. The analysis will utilize our tailored job analysis questionnaire with input and review provided by the manager and department director, and with additional input from interviews with department directors. The purpose of this key phase of the project is to ensure that jobs are properly classified correctly under the FLSA and that a job evaluation for each classification is completed to ensure that resulting pay grades and pay grade relationships reflect the different jobs performed by Authorities employees. This process becomes the foundation of the pay plan's principle of internal equity.

Job Analysis: A detailed job analysis is performed for every job classification included in the study for two primary purposes:

- Ensure that each classification is properly defined and aligned within the pay plan based on job duties, responsibilities, and qualifications
- Provide the information needed to ensure each classification is properly classified as "exempt" or "non-exempt under the federal Fair Labor Standards Act"

The City specifically asked for the Consultant to evaluate job descriptions for "accuracy and consistency." In order to do that competently, we need to gather detailed information about each position. We call that "job analysis."

The Archer Company utilizes two integrated methods of conducting job analysis: the use of a thorough position questionnaire and information gathered from each department, and in-depth interviews with all department directors.

1. **Employee Questionnaires:** The Archer Company utilizes a copyrighted questionnaire that has proven a highly effective tool to gather in-depth data about each position without placing too high an administrative burden on employees. The questionnaire data is essential to the proper analysis, classification, and evaluation of the City's positions and will also be used to update job descriptions. Every question has a purpose.

We will ask that each employee individually, or in a group where a job has multiple incumbents, completes our Comprehensive Position Questionnaire (CPQ) which will serve as a primary resource for the job analysis process. To the extent there may be differences between members of a classification title, we are happy to review CPQs from all employees or as many as the department directors think are needed to represent any job differences between members of the current classification titles.

The Archer Company will supply the questionnaires to the City electronically (hard copy if needed), along with easy-to-follow instructions, frequently asked questions ("FAQs") and additional documentation to help facilitate this effort.

The Archer Company asks department management to ensure that the CPQs are completed, reviewed, and returned to the Project Team in a timely fashion. Department Directors are expected to play a key role in ensuring that all information collected from employees provides accurate, thorough, and quality data for use in the job analysis of their subordinate positions.

The Archer Company Project Director will work with the Project Team to discuss the best way to organize and provide the completed, reviewed CPQs to The Archer Company, utilizing a cloud-based storage system. We will provide specific instructions on labeling and organization of each electronic file.

2. **Interviews:** The Archer Company will conduct interviews with each department director for three key purposes:

- Review the departmental structure and operations, including all reporting relationships and interrelationships between positions

- Understand how the department is impacted by the classification and compensation plan under the current state, and

- Review and discuss specific compensation concerns (e.g., recruitment issues, retention problems, market issues)

Because the interviews are intended to provide data for the classification and compensation study, we will tailor a specific **Department Director Issues Form** to gather specific information from the department directors with respect to any and all classification and/or compensation concerns. Interviews can be completed on site or virtually.

Should the Project Committee believe that any specific positions are unique or in some way require incumbent interviews to supplement the questionnaires and department director interviews, we will discuss the best approach to meet that need.

Job Evaluation: To ensure the outcome of internal equity, The Archer Company recommends the use of a valid and reliable quantitative job evaluation system to objectively measure and determine the relative worth of each classification to the organization. The Archer Company utilizes the Archer Matrix Point-Factor Job Evaluation System as our primary method to objectively measure and determine the relative worth of each classification to the organization. We will work with the Project Team to ensure that the methodology utilized provides a good fit with the City's objectives, and we are open to using additional methodologies if necessary. However, due to the objectivity, reliability, and validity of this system, other methodologies are rarely needed.

The Archer System is a point-factor evaluation matrix that provides a state-of-the-art methodology to measure the relative value of the City’s job classifications and validity in the pay plan’s internal equity. It has evaluated positive against four different measures of validity and has proven to be effective for over three decades of direct application to airport authorities, school districts, and all levels of state and local government. The Archer System measures each job classification based on sixteen factors in order to create an internally equitable classification hierarchy.

Archer Matrix Point-Factor Job Evaluation System Compensable Factors

• The degree of critical impact on departmental/City operations
• Amount of discretion and judgment exercised
• Organizational responsibilities (span of control, etc.)
• Reasoning and decision-making
• Types and levels of interaction with individuals and groups within, and external to, the City
• Knowledge, skills, abilities, and competencies required
• Minimum qualifications for the classification (balance between education and experience with accommodations for professional licenses and certifications)
• The degree of physical effort and personal risk inherent in the job

Job Classification: Based on job analysis and job evaluation, we will clarify the actual job classifications that exist in the body of work completed by the City’s employees. Each classification will be clarified with reference to:

1. Purpose of Classification
2. Distinguishing Characteristics between Multiple Levels (e.g., Administrative Assistant I, II or Engineer I, II)
3. Minimum Education, Experience and Certification/License Requirements
4. Essential Functions
5. ADA Language defining Physical and Environmental Demands plus an affirmative statement of the City’s intent to comply with the federal Americans with Disabilities Act

FLSA and Evaluation: Each classification identified in the study will be evaluated against the potential FLSA exemptions (administrative, executive, etc.) to determine if the classification meets one or more of the tests and can therefore be classified as “exempt” under the FLSA. If none of the tests are met, the job will be categorized as “non-exempt.”

While The Archer Company has significant experience with FLSA analysis and determinations, we are not attorneys. Our recommendations should be reviewed by legal counsel.

As Requested and Authorized, Create/Update Job Descriptions Using a Custom Format: We will discuss how the City uses job descriptions and then we will identify any jobs where the current description is not accurate given the results of our job analysis. If there are issues such as this, we will update the job descriptions as necessary, using the City’s preferred job description format.

Phase Four: Finalize and Execute a “Total Compensation Market Study Strategy”

This phase involves the finalization of the process we will use to measure market competitiveness and current market conditions, and the execution of the strategy via the completion of a comprehensive market assessment.

The City total Compensation Program (base pay, benefits, other monetary and non-monetary rewards) is a key aspect of the City’s ability to recruit and retain talented employees at all levels. This study will be focused on ensuring results support the City’s Compensation Philosophy including the City’s desired “market position.”

The goal of this objective is to ensure we can provide a robust picture of the City’s current pay as well as key pay practices, additional rewards offered, and key employee benefits offerings vis a vis the City’s intended level of competitiveness. From that “gap analysis” we can create recommendations and an implementation plan to align the pay structure, pay practices, performance-related pay programs, benefits programs and other monetary and non-monetary rewards to the desired market position.

The beauty of a Total Compensation Study is that we can fully identify, and communicate to employees, the full economic value to all expenditures made to benefit employees for all aspects of their “compensation.”

The end of this task is marked by the presentation of a detailed report on the City’s market competitiveness overall and for each of the benchmark jobs included in the Market Assessment. Prior to that time, several key decisions are made in conjunction with the City’s about the true market in which the organization competes, and then The Archer Company conducts a comprehensive survey process to give the City a full and complete picture of its competitiveness at this time.

Specific **Phase Four** tasks are described below:

- A. **Identification of the City’s Desired Market Position:** Through one or two working sessions, we will come to understand the City’s desired market position or that decision has not yet been made, we will facilitate discussions intended at exploring options and

their implications. The result of this task will be the definition of the City's desired market position. This decision has implications on the analysis of the market data and information itself, the creation of the gap analysis documentation, and ultimately our recommendations on the pay structure, the benefits program and other components of "total compensation."

The final decision is often not made until the market analysis is completed and we work with our clients to "cost out" plan implementation based on different market percentiles (e.g., 50th percentile, 60th percentile, 70th percentile or other potential percentiles of interest). We are prepared to provide the appropriate and sufficient implementation costing information through iterative modeling that will allow the Project Team to understand the financial impact of choosing different market positions.

- B. **Identification of "Benchmark" Positions and Pay Practices Questions:** The Archer Company will work with the Project Team to identify the list of benchmark classifications that will be included in the custom survey and included in the use of published survey data. ***We expect to benchmark all job titles (with the exception of any that are truly unique).***

With respect to **questions on pay practices and other elements of "compensation"**, we will work with the City to add 10-15 additional questions that query peer pay practices around key compensation events such as hiring pay; pay for promotions, demotions, transfers; pay structure increase practices; any distinctions between "union" and "non-union" pay policies that are utilized; pay increase budget practices; and a variety of supplemental pay practices such as annual incentive bonus plans; other monetary incentive plans; bilingual pay; shift differentials, wage differentials and other pay "add-ons"; market pay exceptions; pay for temporary assignments; etc.

Benefits data will be gathered on up to 20 benefits program areas (retirement and deferred compensation plans (defined benefit, defined contribution, deferred compensation); health insurance program types, employer contributions, maximum out-of-pocket, etc.; paid time off programs; short- and long-term disability; other insurance coverage, etc.).

- C. **Agree to a Definition of "Total Compensation" and Benefits in Particular to Inform the Data to be Collected from Peers:** We will work with the Project Team to specify the components of "total compensation" which should include base salary, target bonus payments and employer expenditures for at least the major benefits categories: health, dental and vision coverage, life insurance, retirement, short and long term disability, and paid time off.

Because total compensation surveys in particular can become very complex, very fast, The Archer Company will show and discuss examples of very successful total compensation studies we have completed and agree to the data that it is imperative to collect to meet the City's needs.

Some data can be gathered from published survey sources, in order to supplement custom data and recognize that survey length has a direct relationship on survey

participant participation (that is the longer the survey, the more difficult it is to maximize participation).

- D. **Identification of Organizations to Be Surveyed:** We will have direct input from the Department Directors through individual interviews which, among other things, will focus on the organizations with whom the City is truly competing for talent. Then, we will work with the Project Team to identify which utilities and other entities are relevant – for a total of up to 17-20 organizations to be included in the custom survey. the City will be asked to approve the final list of targeted survey participants. Employers with the following characteristics are typically surveyed: (1) organizations with which the City clearly has been competing for employees; (2) organizations which are recognized as important, or influential, in the local marketplace; (3) organizations which are within proximity to the City’s competitive market (i.e., the same geographic region); and/or (4) organizations with similar population, demographics, and scope of services.

- E. **Creation of a Customized Web-Based Total Compensation Survey:** The Archer Company will construct a customized survey designed to collect the data requested by the City. The Archer Company utilizes a specific **web-based** format for compensation surveys that has been proven to optimize the collection of data while minimizing the burden to participating organizations; however, this format may be customized to meet the needs or objectives of the City. Respondents can simply click on a link in an email invitation and access the survey, easily completing it. We will also provide a manual copy of the survey in Excel format for organizations who prefer it.

A draft of the survey document will be submitted to the Project Team for review, and appropriate revisions will be made before the survey is initiated. The Project Team will be asked to approve the final survey document.

- F. **Custom Survey Data Collection:** The Archer Company uses a very “hands-on” approach with survey participants to facilitate ease of participation as well as to maximize participation for our clients. *We have excellent survey participation results using our tried and true approach.*

We will identify and compile contact information for the targeted organizations. Each organization will be contacted by phone to invite their participation prior to distribution of the survey.

The Archer Company will contact each participant after the survey has been distributed and provide any follow-up assistance they may need to complete the survey. We will make every reasonable effort to solicit and encourage the participation of the targeted agencies; however, we may ask the City’s personnel to follow up with any personal contacts to help encourage participation.

The Archer Company will examine all survey responses and contact participants as needed to clarify their responses and to solicit additional information as necessary to ensure that appropriate comparisons are made. Significant differences between the job functions for similarly titled positions will be identified and factored into our analysis.

- G. **Collection of Published Survey Data to Supplement Custom Survey:** In this step we compile, organize, and analyze additional data from well-respected surveys in our possession, to acknowledge the role of private sector in the market in which the City is competing.

We will use published survey data for the base salary competitive analysis and also to gather market data on trends in the major benefit expenditures (e.g., health coverage expenditure trends from the Kaiser Family Foundation's annual Employer Health Survey) to be examined in this study, and trends in pay structure adjustments and individual pay adjustments available from major compensation data survey houses.

- H. **Create and Present a Market Competitiveness Report:** We will prepare a detailed report on the current competitiveness of the City's compensation overall and with specific detail for each of the job titles to be assessed. An important discussion will be facilitated by The Archer Company around the appropriate weight to be given to private sector data.

With regard to the Total Compensation comparison, we generally provide a comparison overall and also for each benchmark job, and have provided a couple of example tables below:

Accounting Supervisor Comparison of City of XX Overall Total Compensation Annual Employer Costs To Market (Public and Private)				
Components of Total Compensation	Overall Market Average	City of XX Average	\$ Difference	% Difference
Base Pay at Range Midpoint ¹	\$93,143	\$87,866	(\$5,277)	-6%
Health and Dental Benefits ²	\$16,196	\$15,090	(\$1,106)	-7%
Retirement Plan Contributions ³	\$6,834	\$5,975	(\$859)	-13%
Benefits Costs Only	\$23,030	\$21,065	(\$1,965)	-9%
Total Compensation	\$116,173	\$108,931	(\$7,242)	-6%

¹Base Pay at Range Midpoint reflects the average of the peer (custom survey data) and the published data for this role

²To estimate each employer's annual costs for health and dental benefits, we calculate the weighted average annual health plan costs and dental costs – calculated using the City's tier of coverage employee distribution in the PPO medical plan – applied that to the public sector and private sector data.

³Retirement plan contributions were estimated based on current required contributions to defined benefit plans and maximum contribution rate to any defined contribution and deferred compensation plans.

Table 18B. Health Plan Detail by Coverage Type - PPO

For each type of plan covered, please provide the following information:

Employee Only Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County	BCBS	\$1,051.41	\$0.00	\$1,051.41	100%	0%	\$4,000
City of Asheboro	CIGNA	\$750.00	\$0.00	\$750.00	100%	0%	\$5,000
City of Burlington	Aetna	\$830.41	\$0.00	\$830.41	100%	0%	\$2,000
City of Durham	Aetna	\$860.36	\$0.00	\$860.36	100%	0%	\$5,000
City of Graham	BCBS Base	\$803.39	\$0.00	\$803.39	100%	0%	\$6,500
	BCBS Buy Up	\$803.39	\$80.17	\$883.56	91%	9%	\$4,000
City of Mebane	United Healthcare	Not Provided	\$0.00	Not Provided	100%	0%	\$500
City of Sanford	BCBSNC	\$944.57	\$0.00	\$944.57	100%	0%	\$3,750
Orange County	Traditional	\$933.74	\$0.00	\$933.74	100%	0%	\$1,500
OWASA	BCBSNC	\$890.83	\$0.00	\$890.83	100%	0%	\$1,750
Town of Cary	BCBSNC	\$706.00	\$269.90	\$975.90	72%	28%	\$3,000
Town of Chapel Hill	Blue Cross NC	\$828.60	\$0.00	\$828.60	100%	0%	Not provided
Town of Clayton	BCBS	\$699.62	\$42.50	\$742.12	94%	6%	Not provided
Town of Fuquay-Varina	Cigna	\$761.55	\$0.00	\$761.55	100%	0%	\$4,000
Town of Garner	BCBSNC	\$890.00	\$0.00	\$890.00	100%	0%	\$2,250
Town of Hillsborough	BCBS NC	\$861.01	\$0.00	\$861.01	100%	0%	\$3,000
Town of Holly Springs	Blue Cross	\$700.00	\$0.00	\$700.00	100%	0%	\$5,000
Town of Morrisville	BCBSNC Base	\$823.08	\$0.00	\$823.08	100%	0%	\$5,000
	BCBSNC Buy-up	\$808.39	\$97.00	\$905.39	89%	11%	\$3,000
Town of Pittsboro	BCBS	\$720.16	\$0.00	\$720.16	100%	0%	\$1500/\$3000
Town of Wake Forest	BCBS	\$850.00	\$0.00	\$850.00	100%	0%	\$3,500
City of XXX:	N/A						
Market Average:		\$825.83	\$23.31	\$850.30	97%	3%	\$3,486
Carrboro as % of Mkt Avg:	N/A						

Footnotes: City of Mebane did not provide employer contribution amount;
City of Sanford out of network deductible = \$6,000.00;
Town of Cary - Employee amount is standard, they also have a "reward rate" of \$68 per month

According to the **Employer Health Benefits 2024 Annual Survey**, published by Kaiser Family Foundation, the average monthly total premium for Single Coverage, is \$819 for small firms (199 or fewer workers). For State/Local Government employers only, the average is \$749.
The average EMPLOYEE CONTRIBUTION for PPO Single Coverage is 17% (across all industries).

Phase Five: Pay Structure Development

Based on the results of direction we receive in sub-task A (below), we will develop specific pay structure recommendations.

The Archer Company will incorporate our findings from the review of the current Classification and Compensation Plan, as well as the Market Assessment, in order to provide recommendations for the City's pay structure. This phase constitutes several steps:

- A. **Pay Structure Working Session:** Conduct a working session with the Project Team to understand the market results and gain input on the strengths and potential weaknesses of the current pay structure.

Part of this discussion will require us to focus on understanding whether the City wishes to have a consistent market position with each employee department/job function or

whether there is an interest, and perhaps market rationale for using more aggressive ranges for certain groups.

- B. **Review the Classification Plan Recommendations Against the Current Pay Structure(s):** We will review the City's current pay plan structure *or structures*, as well as how our proposed pay structure (grades and ranges) aligns to the Classification Plan (e.g., the breadth of the scope of assigned duties, number of classifications).

As we create the proposed structure in this phase of the project, our goal is to ensure the structure supports and facilitates the City's objectives, Compensation Philosophy, and operations. The creation of a compensation structure, or structures, involves a detailed understanding of the City's human resources objectives as well as philosophy with regard to compensation, so that the structure supports both elements as well as appropriately balances internal equity and market competitiveness. Key structural elements such as the number of pay grades and pay range width are recommended based on a thorough understanding of the City's **desired market position** and policies with respect to key "compensation events" such as hiring salaries, promotions, and reclassifications.

- C. **Final Pay Plan and Pay Structure Design:** A full understanding of the Classification Plan, input from the Project Team and Department Directors and of course the market data will allow us to create a structure or structures that best aligns with the City's unique challenges and concerns.

Multiple Pay Structures: Sometimes our clients choose different market positions for different occupational families, for example. Other clients may choose to use a combination of step and open ranges between job families, which can necessitate differing pay structure elements such as range width from Minimum to Maximum.

- D. **Final Allocation of Each Classification to a Pay Grade:** In our system, pay grade assignments are most often based on the final Job Evaluation Score (for internal equity). In reality there is a high degree of correlation between our job evaluation scores and actual market pay. If we do find jobs where there is a major difference between the market pay demands and the internal evaluation result, those jobs will be "flagged" and discussed with the City for a final pay grade placement.
- E. **Recommendations on Pay Progression of Non-Represented Employees:** The City indicates interest in having the Consultant provide options for pay progression through the salary ranges. We will evaluate models across the entire spectrum—from predictable "step" plans to performance- and market-driven "open range" plans. Based on an in-depth assessment of your current program, we will recommend a customized approach that directly supports the City's compensation objectives and reward philosophy.
- F. **Review of Proposed Pay Structure with Project Team:** At the point at which we have a proposed pay structure or structures, with all the City's jobs assigned to the appropriate classification, pay grade, and pay range, we will present all recommendations first to the Project Team for review and feedback. *Our review document allows the City to easily enter comments and feedback for ease of review and communication.*

An example of a proposed pay structure analysis is presented below:

Example Analysis of Key Aspects of a Recommended Pay Structure

City of XXXX, WI

Recommended Pay Structure Details (Asymmetrical by design)

8/26/2025

Market Adjustment:	5.0%
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Pay Grade	Range Minimum	Market Reference Point	Range Maximum	Range Width	Width Min to Mkt Reference Point (\$)	Width Min to Mkt Reference Point (%)	Width Mkt Reference Point to Max (\$)	Width Mkt Reference Point to Max (%)	Mkt Reference Point Differential(%)
1	\$29,196	\$35,035	\$43,794	50%	\$5,839	20%	\$8,759	25%	
2	\$32,223	\$38,667	\$48,334	50%	\$6,445	20%	\$9,667	25%	10%
3	\$35,249	\$42,299	\$52,874	50%	\$7,050	20%	\$10,575	25%	9%
4	\$38,276	\$45,931	\$57,414	50%	\$7,655	20%	\$11,483	25%	9%
5	\$41,303	\$49,564	\$61,954	50%	\$8,261	20%	\$12,391	25%	8%
6	\$44,330	\$53,196	\$66,495	50%	\$8,866	20%	\$13,299	25%	7%
7	\$47,356	\$56,828	\$71,035	50%	\$9,471	20%	\$14,207	25%	7%
8	\$50,383	\$60,460	\$75,575	50%	\$10,077	20%	\$15,115	25%	6%
9	\$53,410	\$64,092	\$80,115	50%	\$10,682	20%	\$16,023	25%	6%
10	\$56,437	\$67,724	\$84,655	50%	\$11,287	20%	\$16,931	25%	6%
11	\$59,463	\$71,356	\$89,195	50%	\$11,893	20%	\$17,839	25%	5%
12	\$62,490	\$74,988	\$93,735	50%	\$12,498	20%	\$18,747	25%	5%
13	\$65,517	\$78,620	\$98,275	50%	\$13,103	20%	\$19,655	25%	5%
14	\$68,544	\$82,252	\$102,816	50%	\$13,709	20%	\$20,563	25%	5%
15	\$71,570	\$85,885	\$107,356	50%	\$14,314	20%	\$21,471	25%	4%
16	\$74,597	\$89,517	\$111,896	50%	\$14,919	20%	\$22,379	25%	4%
17	\$79,137	\$94,965	\$118,706	50%	\$15,827	20%	\$23,741	25%	6%
18	\$85,191	\$102,229	\$127,786	50%	\$17,038	20%	\$25,557	25%	8%
19	\$91,244	\$109,493	\$136,866	50%	\$18,249	20%	\$27,373	25%	7%

In this example, when we create structures we create them at different market positions (.e.g., 5% above “market” (see example above), 95% of ‘market’, 110% of ‘market’, “75th percentile) that are of interest to the City. Our Excel cost modeling tool easily accommodates multiple interactions in terms of the structure, and the impact on implementation costs.

Phase Six: Pay Equity and Pay Compression Diagnostic and Strategy Process

We will complete a thorough pay equity analysis and compression analysis and create

remediation strategy recommendations.

The intent of this phase is to identify and provide recommendations around any pay equity issues that may exist in the pay plan. Second we want to fully understand the nature of the compression issues at play, measure the degree of severity, and work with the Project Team to explore and cost out potential remediation strategies.

The pay equity analysis focuses on current pay rates of employees within job titles, and we look for “outliers” where current pay differences cannot be explained by logical factors such as time in job, education, experience and special skills (and performance, if the City has a performance management program).

The fact-finding and diagnostic phase is crucial. With regard to pay equity, we must have full data available on all pay-related factors including education, experience, time in the job, and if relevant, performance scores.

With regard to compression, if we find compression, the “type” of compression we find is important in terms of the right remediation strategy. For example, if the type of compression the City is experiencing in its Public Safety departments is due to high base/overtime earnings of subordinates compared to the earnings of their exempt supervisors/managers, we will need to complete a total earnings analysis of all supervisor/managers and each of their subordinates. Or, if the compression is actually a disconnect between current pay within a range and time in the job (i.e., “newer” employees are earning too close to or more than more “senior” employees), a different analysis and likely set of recommendations will be warranted. *We want to make sure we solve the right issue.*

Pay Equity

We live at a time in the U.S. where demands for pay transparency and equitable salaries are at an all-time high. Our Pay Equity analysis will identify any individual wages and salaries that are risky for the City (if applicable), from a pay equity compliance standpoint. We will provide realistic and defensible remediation recommendations that will resolve any issues that we may find.

Phase Seven: Review and Make Recommendations on Other Key Elements of the Compensation Plan Including Compensation Policies

Primarily, this phase includes a review of the City’s needs and challenges with respect to the Plan and then providing best-in-class compensation policies and practices that are suitable for the City’s situation and objectives.

Based on a review of the current compensation policies, as well as an analysis of market data collected in this study and best “contemporary” practices of similar employers, The Archer Company will make pay practice recommendations. Our intent will be to better align, as

necessary, the City's compensation policies and practices with competitive trends and best contemporary practices, in the following areas (at minimum):

- New hire pay determination (based on job-related education and experience, market considerations, and current internal pay relationships)
- Job changes/reclassifications
- Pay-for-performance
- Pay "add-ons" for bilingual, special duty, certifications and degrees
- Pay for promotions, demotions, transfers
- Pay structure increase practices; pay increase budget practices;
- Pay for temporary assignments, etc.
- On-call and call-in pay
- Managing base pay for employees at or near Range Maximum
- Acting assignment/Interim pay
- Overall, ensuring consistency with the City total Compensation Philosophy and Objectives

The City of De Pere will be able to incorporate our pay practices recommendations in the creation of appropriate pay policies and programs in these areas. Recommendations to better align the current pay practices with the market as well as the City's Compensation Philosophy will be specifically identified.

We will also ensure that the **Employee Handbook** is edited to accurately reflect any changes to the Compensation and/or Benefits Program that result from approved recommendations resulting from our study.

Phase Eight: Develop a Compensation Plan Implementation Action Plan

In this phase we provide options for timing and expenditure levels that align with the City's compensation objectives and philosophy.

With the preceding objectives complete, The Archer Company will create a detailed, clear, and logical set of implementation recommendations. These will include but not be limited to the steps and costs necessary to move all employees onto the new structure or structures, ensure all employees are paid at their new Range Minimum, and then consider options for placement of employees into the new pay grades and ranges.

To support the costing of our recommendations, The Archer Company will collect current payroll and supplemental information. Each employee will be assigned to a job title, pay grade and salary range. We will work with the Project Team in order to complete the following tasks and deliverables:

- A. **Working Session(s) to Finalize Implementation Steps:** We will conduct 1-2 working sessions with the Project Team to discuss priorities, funding, and options for the implementation of the new pay structure(s).

- B. **Recommend and Provide Costing Strategies Associated with Implementing the Updated Pay Plan:** (i.e., transitioning employees to the new pay plan and structure or structures). Implementation costs can be calculated using standard methodologies or customized to meet specific needs of the City.' *For example, costs can be spread over multiple years if necessary.* Emphasis is typically placed on resolving existing pay and compression issues in the most fair and equitable manner, taking into consideration financial constraints and the City's Compensation Philosophy.
- C. **Provide Implementation Guidelines and Specific Tasks and Their Required Sequence:** In this phase, we explore alternatives with the City regarding options (e.g., bring all employees to Range Minimum, stagger implementation based on tenure, performance, etc.). We will prepare estimated costs for 2-3 options of the City's choosing.

These options may be based on different market positions under consideration, in which case our iterative Excel models will allow the Project Team to quickly see the cost impact based on different market positions (such as, for example, 50th percentile, 60th percentile, and average of the top 10 peers).

As part of the analysis and recommendations we will consider current compa-ratio compared to target compa-ratio based on time in job and if the City desires, other factors including performance and market demands. In this "gap analysis" we calculate, for each employee, the difference between current compa-ratio and "target" compa-ratio (based on length of time in job and perhaps other factors) and then roll up individual costs to understand total costs and options for achieving target compa-ratios over a period of time.

If costs are extensive, we will work with the City to prioritize expenditures as needed and develop a specific implementation road map to ensure all implementation recommendations are included in the priority consistent with the City's specific challenges and needs.

Again, our implementation files are structured to be interactive, allowing Archer consultants and clients to see the immediate impact of multiple "What if?" scenarios, in considering implementation options.

- D. **Provide a "Per Employee" Implementation Roadmap:** The implementation reports we prepare in this phase will include a specific roadmap for each Authorities employee in each job title, in each department, as to implementation adjustments (as well as potential classification title and/or FLSA classification adjustments), based on implementation timing chosen by the City. Depending on priorities and implementation funding available, full implementation may be achievable at one point in time, or may be phased in over 1, 2 or in unusual cases, 3 years. The implementation roadmap will accommodate the desired timeframe chosen by the City.

- E. **Create a Communication Toolkit:** Research in compensation communication recommends a mixture of documents and other communication vehicles that are intended toward broad audiences (e.g., managers and supervisors, and employees) and individual communications (e.g., notifications of changes to job title, pay grade and range, and or change in FLSA classification).

In this task, we will work with the Project Team to develop a **Classification and Compensation Study Results Communication Plan**, defining key messages, vehicles, responsible parties and timeframe. We will draft the key documents for broad audiences (e.g., presentation of the Final Report, talking points and FAQs) and a template for individual employee communications (communicating any changes to job title, FLSA classification, pay grade and range). While the individual communication documents (e.g., emails, web postings) will vary in content, the components we would generally want to communicate include:

- Compensation Philosophy: Explain how pay decisions were made (market positioning, internal equity, performance link)
- Compensation Elements: Clearly defining all parts of the total compensation package (base pay, variable pay, benefits, perks)
- Rationale for Changes: Explain why specific adjustments were made (e.g., based on market data, addressing internal pay disparities)
- Specific Impacts: Explain how the new pay structure (e.g., salary grades and ranges) impact pay and career progression
- What's New: Explain any new elements to the Classification and Compensation Program and how the new additions may impact employees

*As part of **Phase 8**, we will organize all working papers, draft and final deliverables, Excel models and final job descriptions into a confidential shared drive, for full and unlimited use by approved Authorities personnel. We will meet all Authorities requirements for form, format and delivery of all project documents.*

Phase Nine: Draft and Final Reports; Creation of All Final Products

Provide and present a draft and final report and present the report to the City Administrator and the Administrative Committee, and finally to the City Council. We will also hold Employee Meetings once the Council has taken action on the study.

Because of the importance of careful and complete education directed to leaders, and the impact of the study on employees within the affected group, we plan to partner with the Project Team to make sure the Final Report is sufficiently detailed and easy to understand.

Final Report content will include but not be limited to:

1. Summary of all Study Methodologies and Processes

2. Compensation Plan Assessment Findings and recommendations
3. Total Compensation Market Assessment results and recommendations (salaries, bonus and incentive programs; key pay practices, benefits, other elements of “total compensation”)
4. Recommended pay structure(s) that support the City’s objectives
5. Pay grade assignment for each classification title
6. Results and recommendations around pay equity and pay compression
7. Implementation recommendations including individual pay adjustments and relative timing, based on the City’s *priorities including results and recommendations to deal with pay compression issues. We can present one implementation option or summarize alternatives.*
8. Policy changes and enhancements that support the City’s human resources objectives as well as the objectives for the Classification and Compensation Plan
9. Recommendations for maintaining the integrity and competitiveness of the Compensation Plan in the future

The Archer Company will first provide a Draft Project Report detailing our findings and recommendations in discussions with the Project Team. All feedback from the Project Team will be carefully considered, and appropriate changes will be made prior to submitting the report in final form. All reports will be available in hard copy and electronic formats.

The Archer Company will present the final results and recommendations and other key elements of our Final Report to the City Administrator and Administrative Committee, and finally, to the City Council. We will work with the Project Team to ensure the presentation will be optimally useful given the City’s protocol and preferences around length, depth, etc.

Employee Presentations: After the City Council approves the study recommendations, we will hold two employee meetings to discuss the study objectives, findings and recommendations. As stated earlier we are also prepared to assist with other aspects of the Employee Communication Plan for this study.

Finally, as a standard practice, The Archer Company provides copies of the survey results to all participants.

Format of Deliverables: As part of this phase, we will organize all working papers, draft and final deliverables, Excel models and final job descriptions into a confidential shared drive, for full and unlimited use by approved City personnel. We will meet all City requirements for form, format and delivery of all project documents.

Phase Ten: Human Resources Training for System Utilization and Maintenance

As part of this proposal, the Archer Company will provide a full day virtual training session for Human Resources staff to support the City’s need to successfully administer the new Compensation Plan and new policies and protocols.

Topics can be customized but generally cover job analysis and job evaluation (including our recommendations around using our Comprehensive Position Questionnaire for future job grading in the establishment of new jobs and reclassification of existing jobs), market assessment, integration of market data and internal evaluation scores to ensure plan effectiveness, internal equity analysis and compression monitoring, pay policy administration challenges, managing job changes, and annual decisions that are necessary to maintain the market competitiveness of the Compensation Plan (i.e., pay structure adjustments, pay increase budgeting).

Outsourcing Job Evaluation and Pay Grade Recommendations

Many Archer clients choose to *outsource* the evaluation and grade assignment of new and changed jobs to The Archer Company for two reasons:

1. Most clients do not evaluate enough jobs each year to maintain a high level of proficiency in job evaluation
2. Ease and convenience of outsourcing

We are happy to discuss this option if the City has interest in the outsourcing option.

Phase Eleven: Post- Study: One Year of Project Support (No Fee Required) and Ongoing Support Considerations

Provide job analysis, evaluation and grade recommendations as needed, and ad-hoc support (up to 20 additional hours) for the first year following issuance of the Final Report.

As part of our services and our commitment to the City's success in administering the new plan, we will provide up to 20 hours of support, at no additional fee, for a period of one (1) year following the issuance of the Final Report. These hours could be used to:

1. Analyze, evaluate and recommend a pay grade for new and substantially-changed positions
2. Any other use deemed necessary by the City, during the first year following project completion. This can include consultation on implementation, individual pay issues that might arise, FLSA questions, and anything that falls within the purview of the City's classification and compensation plan, and our recommendations.

Ongoing Support Beyond the First Year

New and Changing Jobs: After the 20 hours of free support are provided, we are available for a fee of \$300 per job to evaluate and assign a pay grade to new and substantially-changed positions provided to us, and \$375 if the City also requests a new job description. Or, as mentioned above, we can train the City's HR Team to independently evaluate and grade jobs.

Periodic Pay Structure Updates and Pay Increase Funding Recommendations: Beyond ensuring new and changed jobs are properly assessed and graded, we provide an annual letter with budget recommendations for merit budgets and pay structure adjustments, cost of living budgets, and how to integrate these decisions and budgets, to each client, ***at no additional cost to our clients.*** For custom recommendations, or to perform ad-hoc consultant services needed in administering

the compensation plan, ***we will hold our 2026 consulting fees at 2026 levels through the end of calendar year 2027.***

D. Support Needed from Human Resources

The Archer Company uses a turn-key approach that will limit the burden on the City’s staff. The Archer Company expects to conduct all analyses independently, soliciting input and feedback from the Human Resources Director and Project Team on design and structure at critical points in the development of the pay plan. While we have designed the scope of work to minimize the burden on the City’s staff, we welcome more direct involvement from Human Resources and the City’s Management personnel if desired.

We have outlined the support that will be required, by project phase:

All Phases: Be available and agree to reasonable schedule of project progress meetings and meetings to review deliverables.

Phases	Support Needed from Human Resources Staff
1. Project Initiation and Kick-Off Meetings	• Provide data in Data Request form (census, pay plan information, policies, job descriptions, list of jobs with key fields (pay grade, FLSA, etc.), and a few other items • Provide available day/time options for initial extended meeting (working session) and options for a “set” project meeting (approximately 10 meetings to project completion) day and time • Agree to a set project plan and key dates
2. Compensation Plan Current State Assessment	• Attend two working sessions to provide feedback on the current Compensation and Classification Plan policies, processes, and input on what’s working, what’s not, etc. • Answer questions and provide any additional data we might request during our analysis of the “current state”
3. Job Analysis, Evaluation, Classification and Job Documentation	• Schedule Department Director and other job analysis interviews • Review our recommended point factor evaluation results for internal equity purposes – are the jobs correctly stacked from lowest to highest grade? • As desired, gain input from department heads on Archer’s evaluation and recommendations – to finalize job evaluation and job classification outcomes • Review and provide feedback on Final Classification Plan, classification and pay grade assignments, and draft job descriptions

4. Finalize and Execute a Total Compensation Market Study Strategy (Culminating in a Total Compensation Market Competitiveness Report)	• Approve final list of peer organizations for custom survey • Identification of pay practices and benefits areas for inquiry and providing information on the City's benefits plan and to support the Total Compensation analysis • Participate in working session(s) to finalize the Market Assessment Strategy • Approve survey instrument • Provide contacts if available for peer organizations selected for custom survey • Provide a completed Total Compensation Survey documenting the to-be-surveyed pay practices, benefits and other total compensation components – on the City's behalf • Provide a letter from the City's "official" to accompany survey invitation • Review draft Market Competitiveness Report and provide feedback • Review market gap/variance analysis and provide feedback
5. Pay Structure Development	• Participate in working sessions impacting pay structure design choices, and any subsequent meetings • Review and provided feedback for draft Pay Structure
6. Pay Equity, Pay Compression Diagnostic and Remediation Strategy Process	• Participate in working session to discuss types of compression that may be at play presently • Provide per-employee detailed pay and job history data needed to complete a thorough pay equity review • Provide data needed to conduct compression analyses, which might include data on time in job, and/or total W-2 earnings per employee • Review analysis findings and remediation strategy recommendations; provide feedback
7. Review and Recommend Enhancements, Additions and Modifications to the City's Salary Administration Policies	• Participate in any working sessions focused on reviewing current policies, challenges and concerns • Review and provide feedback on draft salary administration policy changes, enhancements and their practical implications
8. Develop a Compensation Plan Implementation Action Plan	• Provide accurate and complete employee data necessary to provide implementation cost modeling (2-3 options) • Attend scheduled meetings and complete timely review of all deliverables

	Communicate important elements for implementation including role of time in job, performance, variance from the market
9. Preparation and Presentation of Draft and Final Reports	- Review Preliminary Final Report - Review Final Report before delivery to the City Administrator and Administrative Committee, and finally the City Council
10. Human Resources Training	- Agree on content and agenda - Schedule training and attend session
11. 20 Hours of Ongoing Support After Completion of Final Study Report	- Work with Archer to define additional support and tasks necessary to support the successful implementation of the new pay structure and any changes to pay policies and/or programs recommended by Archer and approved by the City Council - Provide any data necessary to complete ongoing support tasks

E. Work Schedule

We are providing a **draft** proposed timeline, by project week, capturing the eleven (11) project phases. Due to the timeline requirements, there is considerable overlap in the phases that occurs. As part of Week One activities, we will draft and negotiate as necessary a final timeline. At that point, the Archer will follow the project plan very closely, and we emphasize our strong commitment to careful and transparent project management. *There is rarely a surprise in the execution of an Archer study.*

We are estimating **Week One** to commence on Tuesday, August 4th.

Project Week(s)	Phases	Key Task
Weeks 1 and 2: Weeks of August 3 rd and 10 th	1. Project Initiation and Kick-Off Meetings	- Week One: Authorities fulfill Archer data requests - Week One or Two: Project Kick-Off Meeting, Group Meeting with Department Directors and Up to Three Employee Orientations (ON-SITE)
Weeks 2 and 3: Weeks of August 10 th and 17 th	2. Compensation Plan Current State Assessment	- Two Archer-Company facilitated working sessions - Archer Company reviews classification and compensation plan and all key documents - Archer Company completes a Current State Assessment Report for Project Team

Weeks 2 – 10: Weeks of August 10th - October 5th	3. Job Analysis, Evaluation, Classification and Job Documentation	• Preparation for CPQ distribution and process – (Week 2) • CPQ distribution, completion by employees, management review, Authorities provides completed CPQs to Archer Portal (Weeks 3-6) • Archer conducts department director interviews (Week 7) • Archer analyzes each CPQ and completes job evaluation, FLSA classification, and job classification work including minimum qualifications documentation (Weeks 8-9) • Archer presents draft classification plan, class assignments and tentative pay grades (Week 9) • Authorities reviews deliverables and provides feedback (Week 10) • Archer finalizes classification plan, classification assignments, FLSA classification decisions and pay grades (Week 10) • <i>If requested</i>, Archer will update any non-current job descriptions and/or create new ones for any new job titles identified (Weeks 11-13)
Weeks 2 – 10: Weeks of August 10th – October 5th	4. Finalize and Execute a Total Compensation Market Study Strategy (Culminating in a Total Compensation Market Competitiveness Report)	• Discuss and finalize market strategy including peer organizations, use of appropriate private sector data, and questions on pay practices, benefits and other elements of “total compensation (Week 2) • Archer creates draft Total Compensation Survey, contacts peers for participation, and makes final edits to launch survey process (Weeks 3-4) • Survey in field; Archer follows up and provides weekly updates on participation to Project Team (Weeks 5-7) • Archer Company compiles, cleans, organizes and creates market data report files (Week 9) • City reviews draft market reports and provides feedback (Week 10)
Weeks 10-11: Weeks of October 5th and October 12th	5. Pay Structure Development	• One to two working sessions on pay structure development (Week 10) • Create final structure(s) and assign each classification to grade and range (Week 11)
Weeks 9 – 11: Weeks of September 28th – October 12th	6. Pay Equity, Pay Compression Diagnostic and Remediation Strategy Process	• Authorities provides necessary employee-specific data (Week 9) • Archer conducts exploration working session (Week 10) • Archer conducts pay equity analysis and identifies outliers, and compression analysis (Week 10)

		Archer presents findings and discusses remediation strategies and recommendations (Week 11)
Weeks 6-11: Weeks of September 7th – October 12th	7. Review and Recommend Enhancements, Additions and Modifications to the City's Salary Administration Policies	- Two working sessions on salary administration policies; current policies, concerns, challenges, needs (Week 6) - Draft enhancements, modifications and enhancements to compensation policies (FINAL language responsibility of City to ensure compliance with language standards) (Weeks 7-8) - Present and discuss draft policy recommendations (Week 9) - Authorities reviews salary administration policy recommendations (Week 10) - Archer finalizes all salary administration policy enhancements, additions and recommended modifications (Week 12)
Weeks 12-14: Weeks of October 19th – November 2nd	8. Develop a Compensation Plan Implementation Action Plan	- Archer facilitates implementation planning working session (12) - Archer creates 3 – 4 implementation options and associated costing, in per employee detail and roll-up report (dashboard) formats (Week 13) - Based on Project Team feedback, Archer refines options or focuses on refining chosen option, presenting final implementation recommendations (Week 14)
Weeks 11-15: Weeks of October 12th – November 9th	9. Preparation and Presentation of Draft and Final Reports	- Archer drafts Preliminary Final Report (due to City October 12th) - Project Team reviews and provides feedback to draft Preliminary Final Report (Week 12-13) - Archer creates Final Project Report (due to City Monday November 9th (Week 15)) - Archer presents Final Report to City Administrator and Administrative Committee, and finally to the City Council (TBD) - Archer presents findings and recommendations to City Staff after proposal is approved by City Council.
TBD	10. Training of City's Human Resources Staff	- Development of requirements (Week 1 of 3 weeks) - Creation of training materials (Week 2 of 3) - Virtual training session (Week 3 of 3)
Timing TBD	11. 20 Hours of Post-Project Report Support	Timing and dates dependent upon needs of the City, but can occur anytime within the first year after the November 12, 2026 delivery of the Final Report

Note: The timeline for a Total Compensation Survey (Phase Four) is shortened by 4 weeks from our general recommended timeline, in order to meet the City's overall project timeline. The potential

risks to the proposed timeline due to the length and complexity of the Total Compensation Survey process come from several related factors: 1. Extensions often requested by participants due to the multiple hour effort it generally takes to complete a Total Compensation Survey, 1. Much greater complexity and effort required to follow-up on complex, highly-detailed benefits data, and 3. The time required to process, clean and follow-up on thousands of data fields supplied in total by all survey participants. We will discuss the steps Archer Company will take to complete this work within the required timeframe, but the risk remains to some degree, assuming the City wants to maximize survey participation by the selected peer group.

Section 5. References

A. Reference Details

Reference 1:	
(Owner) Company/Entity Name:	City of Fond du Lac, Wisconsin
Address:	160 South Macy Street
City, State, Zip:	Fond du Lac, WI 54935
Contact Person:	Deb Hoffmann
Title:	City Attorney/Director of Human Resources
E-mail Address of Contact Person:	dhoffmann@fdl.wi.gov
Phone Number:	(920) 322-3423
Service Data:	
Date when Project Started (Month & Year)	September 2024
Date when Project Ended (Month & Year)	April 2025
Project descriptions:	The Archer Company conducted a classification and compensation study for the City covering approximately 215 employees and 150 classifications. Services included job analysis and evaluation, classification review, salary survey administration, pay plan development, Total Compensation evaluation, pay policy and compensation policy evaluation and development, and implementation scenario development and support, including compression analysis.
Total number of employees, classifications:	215, 150

Reference 2:	
(Owner) Company/Entity Name:	City of De Pere, WI
Address:	335 South Broadway Street
City, State, Zip:	De Pere, WI
Contact Person:	Shannon Metzler
Title:	Director of Human Resources
E-mail Address of Contact Person:	smetzler@deperewi.gov
Phone Number:	(920) 339-4045
Service Data:	
Date when Project Started (Month & Year)	January 2026
Date when Project Ended (Month & Year)	July 2026 (presenting Final Report to City Council in September)
Project descriptions:	The Archer Company conducted a classification and compensation study for the City's non-represented employee group. Services included job analysis and evaluation, classification review, salary survey administration, pay plan development, Total Compensation evaluation, pay policy and compensation policy evaluation and development, and implementation scenario development and support, including compression analysis and analysis to ensure the union rates and non-union plan would not be in conflict. In addition, we provided an in-depth analysis of the City's "pay-for-

	performance” program and specific recommendations for program improvement.
Total number of employees, classifications:	103, 70

Reference 3:	
(Owner) Company/Entity Name:	Suwanee River Water Management District
Address:	9225 CR 49
City, State, Zip:	Live Oak, FL 32060
Contact Person:	Kelly Wooley, PHR
Title:	Human Resources Manager
E-mail Address of Contact Person:	kelly.wooley@srwmd.org
Phone Number:	(386) 362-0436
Service Data:	
Date when Project Started (Month & Year)	September 2024
Date when Project Ended (Month & Year)	May 2025
Project descriptions:	The Archer Company developed a classification and compensation study for the District for 63 employees and 63 classifications. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, and implementation scenario development and support.
Total number of employees:	63
Total number of unique job classifications:	63

Reference 4:	
(Owner) Company/Entity Name:	Swain County, NC
Address:	PO Box 2321 50 Main Street, Ste. 300
City, State, Zip:	Bryson City, NC 25713
Contact Person:	Lottie Barker
Title:	County Manager
E-mail Address of Contact Person:	lottie.barker@swaincountync.gov
Phone Number:	(828) 488-9273 ext. 2241
Service Data:	
Date when Project Started (Month & Year)	March 2024
Date when Project Ended (Month & Year)	October 2024
Project descriptions:	The Archer Company conducted a job analysis and developed a classification and compensation study for the County covering 268 employees and 190 unique job classifications. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, and implementation scenario development and support.
Total number of employees:	268

Total number of unique job classifications:	190
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Reference 5:	
(Owner) Company/Entity Name:	Town of Batesburg-Leesville, South Carolina
Address:	120 West Church Street, Suite A
City, State, Zip:	Batesburg-Leesville, SC 29006
Contact Person:	Danna "Cricket" Leaphart
Title:	Assistant Town Manager
E-mail Address of Contact Person:	dleaphart@batesburg-leesville.org
Phone Number:	(803) 532-4601
Service Data:	
Date when Project Started (Month & Year)	May 2025
Date when Project Ended (Month & Year)	January 2026
Project descriptions:	The Archer Company conducted a job analysis and developed a classification and compensation study for the Town covering 80 employees and 55 unique job classifications. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, salary administration policy and compensation policy evaluation and development, development of multiple implementation scenarios, and creation of job descriptions.
Total number of employees:	80
Total number of unique job classifications:	55

Reference 6:	
(Owner) Company/Entity Name:	Town of Nags Head, North Carolina
Address:	P.O. Box 9 5401 S. Croatan Hwy.
City, State, Zip:	Nags Head, NC 27959
Contact Person:	Jan Milke
Title:	Human Resources Director
E-mail Address of Contact Person:	jan.mielke@nagsheadnc.gov
Phone Number:	(252) 449-2007
Service Data:	
Date when Project Started (Month & Year)	September 2025
Date when Project Ended (Month & Year)	April 2026
Project descriptions:	The Archer Company conducted a job analysis and developed a classification and compensation study for the Town covering 80 employees and 67 unique job classifications. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, salary administration policy and compensation policy evaluation and development, and development of multiple implementation scenarios.

Total number of employees:	125
Total number of unique job classifications:	67

Reference 7:	
(Owner) Company/Entity Name:	Albemarle County Service Authority
Address:	168 Spotnap Road
City, State, Zip:	Charlottesville, Virginia 22911
Contact Person:	Quin Lunsford; Emily Roach
Title:	Executive Director; Director of Human Resources & Administration
E-mail Address of Contact Person:	qlunsford@serviceauthority.org; eroach@serviceauthority.org
Phone Number:	(434) 977-4511
Service Data:	
Date when Project Started (Month & Year)	October 2024
Date when Project Ended (Month & Year)	March 2025
Project descriptions:	The Archer Company conducted a classification and compensation study for the Authority covering approximately 100 employees and 84 classifications. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, and implementation scenario development and support, including compression analysis.
Total number of employees:	100
Total number of unique job classifications:	84

Reference 8:	
(Owner) Company/Entity Name:	City of Lancaster, South Carolina
Address:	P.O. Box 1149, 216 South Catawba Street
City, State, Zip:	Lancaster, SC 29712
Contact Person:	Steven "Flip" Hutfles
Title:	City Administrator
E-mail Address of Contact Person:	shutfles@lancastercitysc.com
Phone Number:	(803) 283-2489
Service Data:	
Date when Project Started (Month & Year)	Oct-24
Date when Project Ended (Month & Year)	Jun-25
Project descriptions:	The Archer Company conducted a classification and compensation study for the City covering approximately 180 employees and 80 classifications. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, pay policy and compensation

	policy evaluation and development, and implementation scenario development and support, including compression analysis.
Total number of employees:	180
Total number of unique job classifications:	80

Reference 9:	
(Owner) Company/Entity Name:	City of Manning, South Carolina
Address:	29 West Boyce Street
City, State, Zip:	Manning, SC 29102
Contact Person:	John Singh
Title:	City Administrator
E-mail Address of Contact Person:	jsingh@cityofmanning.org
Phone Number:	(803) 433-5115
Service Data:	
Date when Project Started (Month & Year)	August 2024
Date when Project Ended (Month & Year)	March 2025
Project descriptions:	The Archer Company conducted a job analysis and developed a classification and compensation study for the Town covering 67 employees and 40 unique job classifications. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, salary administration policy and compensation policy evaluation and development, development of multiple implementation scenarios, and creation of job descriptions. <i>We also created a career ladder and pay progression program for the utility departments.</i>
Total number of employees:	67
Total number of unique job classifications:	40

Reference 10:	
(Owner) Company/Entity Name:	City of Sarasota, Florida
Address:	City Hall Annex 1565 1st St, Room 300
City, State, Zip:	Sarasota, FL 34236
Contact Person:	Dominique Anderson
Title:	General Manager, Human Resources
E-mail Address of Contact Person:	dominique.anderson@sarasotafl.gov
Phone Number:	(941) 263-6324
Service Data:	
Date when Project Started (Month & Year)	December 2024
Date when Project Ended (Month & Year)	Jun 2025
Project descriptions:	The Archer Company conducted a classification and compensation study for the City covering approximately 650 non-sworn employees and 400 classifications. Services included job analysis

	and evaluation, classification review, salary survey administration, market placement, pay plan development, Total Compensation evaluation, pay policy and compensation policy evaluation and development, and implementation scenario development and support, including compression analysis. We will present the Final Report to the new City Manager once hired; the Final Report has been provided to the City in the meantime.
Total number of employees:	650
Total number of unique job classifications:	400

Reference 11:	
(Owner) Company/Entity Name:	City of Simpsonville, South Carolina
Address:	425 E. Curtis St.
City, State, Zip:	Simpsonville, S.C. 29681
Contact Person:	Ashley Clark
Title:	Human Resources Director/City Clerk
E-mail Address of Contact Person:	aclark@simpsonville.com
Phone Number:	(864) 967-9526
Service Data:	
Date when Project Started (Month & Year)	May 2025
Date when Project Ended (Month & Year)	February 2026
Project descriptions:	The Archer Company conducted a classification and compensation study for the Town covering 195 employees and 65 unique job classifications. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, salary administration policy and compensation policy evaluation and development, development of multiple implementation scenarios, and creation of job descriptions.
Total number of employees:	195
Total number of unique job classifications:	65

Reference 12:	
(Owner) Company/Entity Name:	Cuyahoga County (Cleveland), Ohio
Address:	9830 Loraine Avenue
City, State, Zip:	Cleveland, Ohio 44102
Contact Person:	Albert Bouchahine
Title:	Co-Director, Personnel Review Commission
E-mail Address of Contact Person:	abouchahine@cuyahogacounty.us
Phone Number:	(216) 443-5619
Service Data:	
Date when Project Started (Month & Year)	February 1992
Date when Project Ended (Month & Year)	Current

Project descriptions:	Originally, the Archer Company conducted a classification and compensation study for the County covering 4000 bargaining and non-bargaining employees. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, pay policy and compensation policy evaluation and development, and implementation scenario development and support, including compression analysis. Since our original project with the County, we have provided similar services and updates, including developing and/or updating multiple pay structures for various elected officials; supporting the transition to a new form of County government; conducting salary surveys; performing compression analysis and remediation strategies; and conducting job evaluations. In 2025, we developed a separate pay plan for unclassified employees. The County currently has 1,200 non-bargaining employees and 950 unique job classifications, and we continue to maintain the County's pay plan.
Total number of employees:	1200
Total number of unique job classifications:	950

Reference 13:	
(Owner) Company/Entity Name:	DeKalb County, Georgia
Address:	Manuel J. Maloof Center 1300 Commerce Drive
City, State, Zip:	Decatur, GA 30030
Contact Person:	Mr. James Woo
Title:	HR Generalist, Principal
E-mail Address of Contact Person:	jwoo@dekalbcountyga.gov
Phone Number:	(404) 371-2434
Service Data:	
Date when Project Started (Month & Year)	2014
Date when Project Ended (Month & Year)	2026
Project descriptions:	The Archer Company developed a classification and compensation study for the County covering 7,000 employees and over 650 classifications. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, pay policy and compensation policy evaluation and development, implementation scenario development and support, and creation of new classification descriptions for each job. Post-implementation, we conducted a regional water and salary survey, focused surveys for specific departments, developed a formal career progression program, and prepared various minimum-rate scenarios, compression analysis, and remediation recommendations, as well as other general human resources consulting services.

Total number of employees:	7000
Total number of unique job classifications:	650

Reference 14:	
(Owner) Company/Entity Name:	Jefferson Parish, Louisiana
Address:	Joseph S. Yenni Building 1 221 Elmwood Park Blvd., Suite 517
City, State, Zip:	Jefferson, LA 70123
Contact Person:	John Dumas
Title:	Personnel Director
E-mail Address of Contact Person:	JDumas@jeffparish.net
Phone Number:	(504) 364-2730
Service Data:	
Date when Project Started (Month & Year)	1997
Date when Project Ended (Month & Year)	Current
Project descriptions:	The original classification and compensation study for the Parish covered 2400 employees and 700 unique job classifications. Services included developing a formal pay structure, job analysis and evaluation, salary survey administration, market placement, compression analysis, implementation recommendations for each employee, including costing, and creating new classification descriptions for each job in the Final Classification Plan. Since our original project, we have developed separate classification plans for judicial and unclassified employees and have conducted periodic studies and adjustments to pay ranges to keep the Parish competitive. The Parish licenses the Archer Job Evaluation System and conducts job evaluations internally.
Total number of employees:	2400
Total number of unique job classifications:	700

Reference 15:	
(Owner) Company/Entity Name:	Sarasota Manatee Airport Authority
Address:	6000 Rick Piccolo Circle
City, State, Zip:	Sarasota, FL 34243
Contact Person:	Kimberly A. Nicholls
Title:	Sr. Vice President - Human Resources
E-mail Address of Contact Person:	Kimberly.Nicholls@flysrq.com
Phone Number:	(941) 359-2770 Ext. 4275
Service Data:	
Date when Project Started (Month & Year)	May 2024
Date when Project Ended (Month & Year)	January 2025
Project descriptions:	The Archer Company developed a classification and compensation study for the Authority covering 169 employees and 92

	classifications. Services included job analysis and evaluation, classification review, salary survey administration, market placement, pay plan development, pay and compensation policy evaluation and development, and development of multiple implementation scenarios for a nuanced, multi-year implementation.
Total number of employees:	169
Total number of unique job classifications:	92

B. Work Product Examples

The following work samples have been provided. We note that each work example was authored or designed by the project's proposed Project Manager, Marianne Oyaas:

Exhibit 1: Partial Example of a Custom Benchmark Survey Market Report

Exhibit 2: Partial Example of a Custom Pay Practices Survey Questionnaire

Exhibit 3: Partial Example of a Custom Pay Practices Survey Market Report

Exhibit 4: Example Pay Plan Implementation Cost Dashboard

Exhibit 5: Example Compensation Final Report

Section 6. Fee Proposal

A. Not-To-Exceed Costs

Based on the scope of work contained in this proposal, with a count of approximately 92 employees in 50-55 job classifications, we present the **not-to-exceed** cost proposal:

Project Phase:	Fees
1. Project Initiation and Kick-Off Meetings	\$3,250
2. Compensation Plan Current State Assessment	\$2,200
3. Job Analysis, Validation of Job Classification, Evaluation	\$6,300
4. Finalize and Execute a Total Rewards Market Study Strategy (Culminating in a Market Competitiveness Report) Including All Job Titles, All Key Benefit Programs , Key Pay Practices and any Other Elements of "Compensation" (e.g., incentives and bonuses, stipends)	\$9,250
5. Pay Structure Development	\$4,000
6. Pay Equity, Pay Compression Diagnostic and Remediation Strategy Process	\$2,800
7. Review with Recommendations for City's Compensation Policies (and Updating Employee Handbook) Compensation Policies	\$3,200
8. Develop a Compensation Plan Implementation Action Plan with Multiple Options Cost Modeling and Communication Toolkit	\$3,420
9. Preparation and Presentation of Draft and Final Reports	\$4,000
10. Human Resources Training (Virtual)	\$2,800
11. 20 Hours of Post-Study Report (first year following Final Report)	\$0
Travel Expenses (lodging, meals, mileage):	\$2,900 (based on four on-site visits; 7.5 days on site)
TOTAL:	\$44,120

The Total Fee amount includes **20 hours of additional support, during the first year, at no additional charge.** The City can use those hours as needed.

B. Hourly Rates

Should the City ask The Archer Company to provide additional work not covered in the RFP or our proposal, our 2026 hourly fees are:

- Project Director and Senior Consultant Rate - \$160 per hour
- Project Specialist Rate - \$85 per hour

C. Ongoing Plan Support

Year One – up to 20 hours of support – no charge (noted above)

Year Two – Archer Company will honor 2026 hourly rates (above) through the end of 2027 for any additional compensation consulting work requested by the City (job evaluation and job descriptions are completed on a fixed fee basis):

Job Evaluations - \$300 *

Job Evaluations with Job Descriptions - \$375*

**After 20 hours of support has been completed at no charge*

Exhibit 1

TOWN OF XXX, NORTH CAROLINA

Pay Range Competitiveness Report - Average Variance by Department - 2024 Market Assessment

Compiled by the Archer Company
2/5/2025

	Town rate is more than 20% below the Market Mean value
	Town rate is more than 10% below the Market Mean value
	Town rate is more than 10% above the Market Mean value

- Indexes (columns F, I and M) within a range of -10% to 10% are considered within a "competitive range"

Overall:										
-13%				-14%				-15%		
PAY RANGE MINIMUM				PAY RANGE MIDPOINT				PAY RANGE MAXIMUM		
Job Title	Current	Market Mean	% Difference from Market Mean	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean
Communications & Engagement Director	\$90,555	\$103,433	-12%	\$115,431	\$138,663	-17%	17	\$140,306	\$173,396	-19%
Communications & Engagement Specialist	\$48,023	\$58,206	-17%	\$61,215	\$74,947	-18%	18	\$74,407	\$92,483	-20%
Overall			-19%			-23%				-25%
Economic Development Director	\$90,555	\$112,218	-19%	\$115,431	\$149,330	-23%	13	\$140,306	\$188,162	-25%
Overall			-9%			-11%				-12%
Finance Director	\$99,837	\$121,563	-18%	\$127,262	\$160,226	-21%	21	\$154,688	\$198,639	-22%
Payroll & Benefits Coordinator	\$52,946	\$55,351	-4%	\$67,490	\$70,883	-5%	19	\$82,034	\$87,211	-6%
Procurement Coordinator	\$61,291	\$65,063	-6%	\$78,128	\$84,170	-7%	15	\$94,965	\$103,682	-8%
Overall			-22%			-24%				-25%
Battalion Chief	\$61,291	\$84,077	-27%	\$78,128	\$108,657	-28%	12	\$94,965	\$134,107	-29%
Deputy Fire Chief	\$78,225	\$101,446	-23%	\$99,713	\$135,021	-26%	13	\$121,202	\$169,987	-29%
Fire Captain	\$55,593	\$73,369	-24%	\$70,864	\$94,126	-25%	14	\$86,136	\$115,843	-26%

TOWN OF XXX, NORTH CAROLINA

Pay Range Competitiveness Report - Average Variance by Department - 2024 Market Assessment

Compiled by the Archer Company
2/5/2025

	Town rate is more than 20% below the Market Mean value
	Town rate is more than 10% below the Market Mean value
	Town rate is more than 10% above the Market Mean value

- Indexes (columns F, I and M) within a range of -10% to 10% are considered within a "competitive range"

Overall: -13% -14% -15%										
PAY RANGE MINIMUM				PAY RANGE MIDPOINT				PAY RANGE MAXIMUM		
Job Title	Current	Market Mean	% Difference from Market Mean	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean
Fire Chief	\$99,837	\$127,487	-22%	\$127,262	\$170,741	-25%	14	\$154,688	\$210,812	-27%
Fire Driver Operator	\$50,425	\$61,553	-18%	\$64,276	\$78,985	-19%	14	\$78,128	\$97,210	-20%
Fire Marshal	\$67,574	\$82,412	-18%	\$86,136	\$106,409	-19%	13	\$104,699	\$131,617	-20%
Firefighter/Relief Driver	\$43,559	\$55,867	-22%	\$55,524	\$72,075	-23%	13	\$67,490	\$89,087	-24%
Overall			4%			3%				1%
Administrative Assistant	\$43,559	\$42,044	4%	\$55,524	\$54,065	3%	20	\$67,490	\$66,643	1%
Overall			-15%			-17%				-18%
Human Resources Analyst	\$58,373	\$66,578	-12%	\$74,408	\$85,667	-13%	17	\$90,443	\$105,790	-15%
Human Resources Director	\$95,083	\$114,893	-17%	\$121,202	\$151,445	-20%	21	\$147,322	\$189,445	-22%
Overall			-22%			-23%				-24%
IT Operations Manager	\$67,574	\$93,237	-28%	\$86,136	\$120,261	-28%	15	\$104,699	\$148,252	-29%
IT Systems Administrator	\$64,356	\$77,365	-17%	\$82,034	\$98,942	-17%	19	\$99,713	\$121,691	-18%

TOWN OF XXX, NORTH CAROLINA

Pay Range Competitiveness Report - Average Variance by Department - 2024 Market Assessment

*Compiled by the Archer Company
2/5/2025*

	Town rate is more than 20% below the Market Mean value
	Town rate is more than 10% below the Market Mean value
	Town rate is more than 10% above the Market Mean value

- Indexes (columns F, I and M) within a range of -10% to 10% are considered within a "competitive range"

Overall:				-13%				-14%				-15%			
PAY RANGE MINIMUM				PAY RANGE MIDPOINT				PAY RANGE MAXIMUM							
Job Title	Current	Market Mean	% Difference from Market Mean	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean					
Overall			-12%			-12%				-14%					
Code Enforcement Officer 1	\$45,737	\$52,981	-14%	\$58,300	\$68,081	-14%	18	\$70,864	\$83,959	-16%					
Code Enforcement Supervisor	\$70,952	\$73,244	-3%	\$90,443	\$84,943	6%	12	\$109,934	\$115,899	-5%					
Deputy Planning Director	\$78,225	\$92,065	-15%	\$99,713	\$123,373	-19%	10	\$121,202	\$155,104	-22%					
Environmental Planner	\$61,291	\$68,145	-10%	\$78,128	\$88,296	-12%	6	\$94,965	\$109,075	-13%					
GIS Administrator	\$64,356	\$79,982	-20%	\$82,034	\$102,786	-20%	12	\$99,713	\$125,999	-21%					
GIS Technician	\$48,023	\$55,568	-14%	\$61,215	\$71,400	-14%	14	\$74,407	\$88,094	-16%					
Permit Technician	\$39,510	\$44,491	-11%	\$50,362	\$57,035	-12%	19	\$61,215	\$70,212	-13%					
Planner	\$58,373	\$61,713	-5%	\$74,408	\$79,150	-6%	19	\$90,443	\$97,409	-7%					
Planning Administrator	\$74,500	\$88,723	-16%	\$94,965	\$114,125	-17%	10	\$115,430	\$140,259	-18%					
Planning Director	\$99,837	\$113,080	-12%	\$127,262	\$149,883	-15%	19	\$154,688	\$186,807	-17%					
Transportation Planner	\$61,291	\$67,771	-10%	\$78,128	\$85,399	-9%	8	\$94,965	\$103,488	-8%					

TOWN OF XXX, NORTH CAROLINA

Pay Range Competitiveness Report - Average Variance by Department - 2024 Market Assessment

Compiled by the Archer Company
2/5/2025

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- Indexes (columns F, I and M) within a range of -10% to 10% are considered within a "competitive range"

Overall: -13% -14% -15%										
PAY RANGE MINIMUM				PAY RANGE MIDPOINT				PAY RANGE MAXIMUM		
Job Title	Current	Market Mean	% Difference from Market Mean	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean
Overall			-12%			-13%				-13%
Administrative Assistant	\$43,559	\$42,044	4%	\$55,524	\$54,065	3%	20	\$67,490	\$66,643	1%
Police Chief	\$104,829	\$126,103	-17%	\$133,625	\$170,716	-22%	19	\$162,422	\$206,010	-21%
Police Lieutenant	\$67,574	\$83,088	-19%	\$86,136	\$104,345	-17%	18	\$104,699	\$126,995	-18%
Police Officer 1	\$52,946	\$59,241	-11%	\$67,490	\$74,287	-9%	19	\$82,034	\$90,337	-9%
Police Sergeant	\$61,291	\$75,021	-18%	\$78,128	\$94,532	-17%	19	\$94,965	\$115,131	-18%
Overall			-10%			-11%				-12%
Administrative Assistant	\$43,559	\$42,044	4%	\$55,524	\$54,065	3%	20	\$67,490	\$66,643	1%
Building Maintenance Specialist	\$43,559	\$47,818	-9%	\$55,524	\$61,283	-9%	18	\$67,490	\$75,309	-10%
Capital Projects Manager	\$67,574	\$80,387	-16%	\$86,136	\$103,951	-17%	16	\$104,699	\$128,111	-18%
Engineer 1	\$58,373	\$68,549	-15%	\$74,408	\$86,543	-14%	9	\$90,443	\$105,732	-14%
Engineering Inspector	\$55,593	\$60,783	-9%	\$70,864	\$77,996	-9%	17	\$86,136	\$95,927	-10%

TOWN OF XXX, NORTH CAROLINA

Pay Range Competitiveness Report - Average Variance by Department - 2024 Market Assessment

Compiled by the Archer Company
2/5/2025

	Town rate is more than 20% below the Market Mean value
	Town rate is more than 10% below the Market Mean value
	Town rate is more than 10% above the Market Mean value

- Indexes (columns F, I and M) within a range of -10% to 10% are considered within a "competitive range"

Overall:				-13%				-14%				-15%			
PAY RANGE MINIMUM				PAY RANGE MIDPOINT				PAY RANGE MAXIMUM							
Job Title	Current	Market Mean	% Difference from Market Mean	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean		Current	Market Mean	% Difference from Market Mean	
Maintenance/Construction Worker 1	\$35,836	\$40,338	-11%	\$45,679	\$51,982	-12%	19	\$55,525	\$64,147	-13%					
Public Works Director	\$104,829	\$118,889	-12%	\$133,625	\$158,713	-16%	18	\$162,422	\$194,999	-17%					
Solid Waste Equipment Operator 1	\$34,129	\$42,268	-19%	\$43,504	\$54,284	-20%	12	\$52,880	\$66,802	-21%					
Solid Waste Equipment Operator 3	\$41,484	\$47,460	-13%	\$52,880	\$60,741	-13%	14	\$64,276	\$74,772	-14%					
Solid Waste Supervisor	\$58,373	\$60,168	-3%	\$74,408	\$77,348	-4%	15	\$90,443	\$95,063	-5%					
Stormwater Utility Manager	\$70,952	\$78,255	-9%	\$90,443	\$101,242	-11%	14	\$109,934	\$125,062	-12%					

TOWN OF XXX, NORTH CAROLINA

Results of the 2024 Salary Survey

Compiled by the Archer Company

Administrative Assistant

MARKET SUMMARY	MIN	MID	MAX
25th Percentile	37,994.73	48,865.07	58,935.32
50th Percentile (Median)	42,531.90	53,775.48	66,980.25
Average (Mean)	42,043.85	54,065.48	66,643.41
75th Percentile	44,650.30	58,687.38	72,179.58
# of Respondents	20	20	20
Town of XXX	43,559.00	55,524.00	67,490.00
% Difference to Market Mean	4%	3%	1%

RESPONDENT	MIN	MID	MAX	ACTUAL/AVERAGE PAY	ANNUAL HOURS	FLSA STATUS	RANGE WIDTH (%)	% DIFF TO MARKET MEAN	ORG JOB TITLE	ARCHER NOTES TO CLIENT
Alamance County	\$37,462	\$44,954	\$52,446	N/A	2080	N/A	40%	-17%	Office Assistant III	
Chatham County	\$35,519	\$45,285	\$55,054	N/A	2080	N/A	55%	-16%	Administrative Support Specialist I	
City of Asheboro	\$38,172	\$45,806	\$57,257	N/A	2080	N	50%	-15%	Administrative Support Specialist I	
City of Burlington	\$43,855	\$57,014	\$70,173	N/A	2080	N	60%	5%	Administrative Assistant	
City of Durham	\$43,039	\$58,334	\$73,629	\$58,095	2080	N	71%	8%	Administrative Technician, Senior	
City of Graham	\$47,798	\$59,747	\$71,696	N/A	2080	N	50%	11%	Office Assistant	
City of Mebane	\$41,558	\$51,948	\$64,934	N/A	2080	N/A	56%	-4%	Administrative Support Specialist	
City of Sanford	\$46,965	\$62,229	\$77,492	N/A	2080	N/A	65%	15%	ADMIN ASSISTANT I	
Orange County	\$35,488	\$53,231	\$70,974	N/A	2080	N	100%	-2%	Office Assistant I	
OWASA	\$39,663	\$49,579	\$59,495	N/A	2080	N/A	50%	-8%	Administrative Assistant	
Town of Cary	\$42,608	\$54,320	\$66,032	N/A	2080	N	55%	0%	Administrative Assistant	
Town of Chapel Hill	\$34,615	\$45,860	\$57,105	N/A	2080	N/A	65%	-15%	ADMINISTRATIVE ASSISTANT	
Town of Clayton	\$42,740	\$60,006	\$77,273	N/A	2080	N/A	81%	11%	Administrative Support Associate	
Town of Fuquay-Varina	\$42,456	\$55,192	\$67,929	N/A	2080	N	60%	2%	Office Support Specialist	
Town of Garner	\$41,777	\$51,734	\$63,679	N/A	2080	N	52%	-4%	Administrative Specialist	
Town of Hillsborough	\$36,593	\$46,724	\$56,856	N/A	2080	N	55%	-14%	ADMINISTRATIVE SUPPORT SPECIALIST	
Town of Holly Springs	\$45,808	\$57,260	\$68,712	N/A	2080	N/A	50%	6%	Administrative Assistant	
Town of Morrisville	\$48,848	\$63,502	\$78,156	\$56,146	2080	N	60%	17%	Senior Administrative Assistant	
Town of Pittsboro	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Town of Wake Forest	\$51,649	\$65,890	\$80,133	\$59,249	2080	N/A	55%	22%	Administrative Assistant	
Economic Research Institute - SURVEY SCOPE: Raleigh Area, all employers; all industries; with Cost of Labor adj	\$44,264	\$52,694	\$63,843	N/A	1950	N/A	44%	-3%	Administrative Assistant - Level 2	

Notes:

- For non-exempt jobs at the client organization, Range Min, Mid and Max values are adjusted to reflect the client organization's annual hours if necessary
- Range Min, Mid and Max values and Actual/Average pay are adjusted to equalize Respondent cost of labor to the cost of labor in the city in which the client organization is housed

TOWN OF XXX, NORTH CAROLINA

Results of the 2024 Salary Survey

Compiled by the Archer Company

Battalion Chief

MARKET SUMMARY	MIN	MID	MAX
25th Percentile	73,799.88	94,907.34	116,559.52
50th Percentile (Median)	82,700.19	110,621.12	136,540.73
Average (Mean)	84,076.92	108,657.33	134,107.09
75th Percentile	90,936.32	118,217.93	145,499.54
# of Respondents	12	12	12
Town of XXX	61,291.00	78,128.00	94,965.00
% Difference to Market Mean	-27%	-28%	-29%

RESPONDENT	MIN	MID	MAX	ACTUAL/AVERAGE PAY	ANNUAL HOURS	FLSA STATUS	RANGE WIDTH (%)	% DIFF TO MARKET MEAN	ORG JOB TITLE	ARCHER NOTES TO CLIENT
Alamance County	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Chatham County	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
City of Asheboro	\$72,317	\$86,781	\$108,477	N/A	2704	E	50%	-20%	Fire Battalion Chief	
City of Burlington	\$74,294	\$96,116	\$117,938	N/A	2912	N/A	59%	-12%	Battalion Chief (Emergency Response)	
City of Durham	\$81,758	\$104,296	\$126,834	\$116,621	2912	E	55%	-4%	same	
City of Graham	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
City of Mebane	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
City of Sanford	\$83,642	\$110,826	\$138,009	N/A	2950	N/A	65%	2%	FIRE BATTALION CHIEF	
Orange County	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
OWASA	N/A	N/A	N/A	N/A	2080	N/A	N/A	N/A	N/A	
Town of Cary	\$96,271	\$127,546	\$158,821	N/A	2756	E	65%	17%	Battalion Chief	
Town of Chapel Hill	\$70,139	\$91,281	\$112,424	N/A	2912	N/A	60%	-16%	BATTALION CHIEF - SHIFT COMMANDER	
Town of Clayton	\$80,159	\$112,589	\$145,019	N/A	2756	N/A	81%	4%	Battalion Chief	
Town of Fuquay-Varina	\$91,358	\$118,765	\$146,172	N/A	2756	E	60%	9%	Fire Battalion Chief	
Town of Garner	\$67,290	\$83,312	\$102,535	N/A	3340	E	52%	-23%	Fire Battalion Chief	
Town of Hillsborough	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Town of Holly Springs	\$115,139	\$143,923	\$172,708	N/A	2145	N/A	50%	32%	Battalion Chief	
Town of Morrisville	\$90,796	\$118,036	\$145,275	\$127,273	2756	N	60%	9%	Battalion Chief	
Town of Pittsboro	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Town of Wake Forest	\$85,760	\$110,417	\$135,072	\$98,139	2912	N/A	58%	2%	Battalion Chief	
Economic Research Institute - SURVEY SCOPE: Raleigh Area, all employers; all industries; with Cost of Labor adj	N/A	N/A	N/A	N/A	2808	N/A	N/A	N/A	N/A	

Notes:

- For non-exempt jobs at the client organization, Range Min, Mid and Max values are adjusted to reflect the client organization's annual hours if necessary
- Range Min, Mid and Max values and Actual/Average pay are adjusted to equalize Respondent cost of labor to the cost of labor in the city in which the client organization is housed

Exhibit 2

City of XYZ, Wisconsin
2025 Pay Practices and Benefits Survey

About this survey:

- To complete the form electronically, use the tab key or your mouse to move through the document and select the appropriate field. Type your information into the spaces provided; to select a check box, use your space bar or your mouse. The fields will expand as you enter your responses.
- Please complete the questions with information specific to your organization.
- Responses are due by _____

Who should we contact regarding the data collected in this survey?

Organization: _____	Name: _____	Email: _____
City/State _____	Title: _____	Phone: _____

GENERAL INFORMATION

1. Number of employees in your organization: Full-time: _____ Part-time / Seasonal: _____
2. What is your **annual** operating budget for **all** funds? _____

PAY STRUCTURE, PRACTICES, AND POLICIES

3. Please choose the answer below that best describes your pay structure (if you have multiple structures, please answer for the structure covering the largest number of employees):
- ☐ Pay ranges are divided into “step” amounts, i.e., a “step” plan.
- ☐ Open ranges (i.e., Range Minimum, Midpoint and Maximum)
- ☐ Pay ranges are divided into “steps” for the lower half of the range, and open ranges are used for the upper half of the range (i.e., a “hybrid” plan).
- ☐ Other (please specify): _____
4. How often do you adjust your pay structure(s)?
- ☐ Annually
- ☐ Every other year
- ☐ Every 3rd year
- ☐ No defined schedule
- ☐ Other (please specify): _____

Please go to next page

5. What index or data source does your organization use to determine the pay structure amount? We are referring to the amount the *pay ranges themselves* are adjusted periodically (Check all that apply):
- ☐ Consumer Price Index (CPI)
 - ☐ Employer Cost Index (ECI)
 - ☐ Same amount as the COLA or Across-the-Board increase given to employees in the same year.
 - ☐ We use World at Work, Conference Board, Mercer, or other major Compensation Consulting Firm Survey Results on Pay Structure Movement Trends
 - ☐ Other (please specify):

6. Do you allow new employees to start at a wage or salary amount higher than the Salary Range Minimum?
Yes ☐ No ☐
- If “yes,” how is starting salary determined? _____

7. Please check the answer that best describes your organization’s “pay” policy for hours worked above the normal workweek for FLSA-exempt professional, supervisory, and managerial roles:
- ☐ As exempt positions, incumbents are expected to work the necessary hours required. There is no extra compensation, time off, or any specific renumeration of any type for hours above the normal workweek.
 - ☐ We provide “compensatory” time at the rate of one (1) hour for each hour worked above the standard workweek.
 - ☐ We provide “compensatory” time at the rate of 1.5 hours for each hour worked above the standard workweek.
 - ☐ We allow employees to flex time during the current pay period, or the one immediately following, when hours worked are above the standard workweek.
 - ☐ We provide pay at the rate of one (1) hour for each hour worked above the standard workweek.
 - ☐ We provide pay at the rate of 1.5 hours for each hour worked above the standard workweek.
 - ☐ We provide additional time off for exempt supervisory and management positions in the form of additional vacation days, personal days, and/or PTO days.
 - ☐ Other (please specify) _____

8. If your organization offers shift differential pay for evenings, nights and/or weekends, please provide the following information:

SHIFT DIFFERENTIAL	
What positions are eligible for shift differentials?	_____
Evening Shift Differential Amount (enter N/A if this doesn't apply):	_____
Night Shift Differential Amount (enter N/A if this doesn't apply):	_____
Weekend Shift Differential Amount (enter N/A if this doesn't apply):	_____
Please provide any additional information appropriate to describe your shift differential program:	_____

Please proceed to the next page

9. If your organization offers a bilingual pay program, please provide the following information:

BILINGUAL PAY	
What positions are eligible for bilingual pay:	
What type of remuneration is provided (e.g., lump sum amount, increase to hourly rate, additional time off):	
What languages are included in the bilingual pay program?	
Please describe any type of proficiency testing required for the bilingual pay program:	

10. Please provide information about compensation and time off accrual practices for employees working different ANNUAL hours. Example: You have some employees in your organization that work 2080 annual hours (40 per week) and some that work 1950 hours (37.5 per week). Please choose the option that best describes your compensation practice in this situation.

- ☐ N/A – we do not have multiple weekly/annual hours schedules.
- ☐ Employees that work different weekly/annual schedules are paid the same HOURLY RATE, but would receive DIFFERENT ANNUAL EARNINGS
- ☐ Employees that work different weekly/annual schedules are paid DIFFERENT HOURLY RATES, in order to receive the SAME ANNUAL EARNINGS
- ☐ Other option (please describe): _____

11. Do you offer bonuses for any of the following? If so, please indicate the payment type:

Type of Bonus	Yes/No	% of Base Pay or Lump Sum?	Amount
Hiring			
Retention			
Referral			
High Performer			
Incentive based on performance on organizational goals or metrics			
Incentive based on performance on departmental goals or metrics			
Incentive based on performance on individual goals or metrics			

Please proceed to the next page

12. Does your organization offer monetary recognition for longevity/years of service? Yes ☐ No ☐
- If yes, please indicate, for each level of Years of Service, how the longevity is rewarded:

	Bonus Payment		Base Salary Increase	
Years of Service	Bonus Amount (\$)	Bonus Amount (%)	Base Increase Amount (\$)	Base Increase Amount (%)
After 5 Years of Service				
After 10 Years of Service				
After 15 Years of Service				
After 20 Years of Service				
After 25 Years of Service				
After 30 Years of Service				

13. If your organization offers on-call or “stand-by” pay and/or “call-in” pay, please provide the following information:
- Definition:** “On-call” or “stand-by” pay is payment for designated periods when employees are not working but must remain available to work with little or no notice. “Call-in” pay refers to any payment for coming into work during an “on-call” period:

ON-CALL/STAND-BY/CALL-IN PAY	
What departments/positions are eligible for on-call/call-in pay?	
On-Call: What type of compensation is provided (e.g., lump sum amount, regular hourly rate, additional time off):	
On-Call: If the pay is in the form of an hourly rate, please describe the amount (e.g., regular hourly rate, reduced hourly rate, overtime hourly rate):	
Call-In Pay: If an on-call employee is called in to work, are they offered additional compensation? (Yes or No)	
Call-In Pay: If employees called in are offered additional compensation, please describe the amount (e.g., lump sum amount, regular hourly rate, overtime hourly rate, additional time off):	
Please provide any additional information appropriate to describe your on-call/call-in pay program:	

OTHER POLICIES

14. a. Does your organization have a policy for compensating positions that are either highly specialized, hard to fill, or simply in demand? Yes ☐ No ☐
- b. If “Yes,” please indicate which actions you take to recruit and retain employees in these positions in the following categories:

Action	Non-Exempt		Exempt- Individual Contributor		Manager/Supervisor	
Salaries targeted higher in pay grade	Yes ☐	No ☐	Yes ☐	No ☐	Yes ☐	No ☐
Special Pay Grade Structure Defined	Yes ☐	No ☐	Yes ☐	No ☐	Yes ☐	No ☐
Skill Premium Paid in Addition to Base Pay	Yes ☐	No ☐	Yes ☐	No ☐	Yes ☐	No ☐
Hire On Bonus Paid	Yes ☐	No ☐	Yes ☐	No ☐	Yes ☐	No ☐
Retention Bonus Paid	Yes ☐	No ☐	Yes ☐	No ☐	Yes ☐	No ☐
Other (please specify)						

15. How do you balance competitive compensation with budgeting constraints and funding limitations? _____

16. Do you have a formal salary administration policy for reclassifications (situations where jobs change suddenly or gradually)? Yes ☐ No ☐

If “Yes,” what is the typical increase or range of possible increases you give to employees whose jobs are reclassified?

<u>Reclassification Type</u>	<u>Percentage</u>	<u>Percentage Range</u>
One Grade Increase		
Two or More Grade Increase		

HEALTH AND RELATED INSURANCE

17. Please provide the following information regarding the **MOST POPULATED** health insurance plan you offer:

Plan Type:

- ☐ HMO – Health Maintenance Organization
- ☐ PPO – Preferred Provider Organization
- ☐ CDHP/HDHP – Consumer Driven/High Deductible
- ☐ POS – Point-of-Service

18. For the **MOST POPULATED** plan, as indicated above, please provide the following information:

MOST POPULATED HEALTH INSURANCE PLAN			
Plan Provider:	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Maximum Annual Out-of-Pocket
Employee Only			
Employee + Spouse			
Employee + Child			
Employee + Family			

19. If you offer a high deductible plan, please indicate the employer annual \$ contribution amount to a Health Savings Account (HSA) or Health Reimbursement Account (HRA) for each category. If your organization does not contribute to an HSA or HRA, enter “N/A.”

Employee Only: \$_____

Employee + Spouse: \$_____

Employee + Child: \$_____

Employee + Family: \$_____

20. If the medical plans listed above do not include prescription drug coverage, please provide the following on the **MOST POPULATED** Prescription Drug Plan:

Check if Prescription Coverage is NOT a separate plan and move to the next question. ☐

Prescription Drug Plan Name: _____

MOST POPULATED PRESCRIPTION DRUG PLAN				
Coverage Type	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Co-Pay (\$)	Annual Deductible (\$)
Employee Only				
Family				

Please go to next page

21. If the medical plans listed above do not include dental coverage, please provide the following on the **MOST POPULATED** Dental Plan:

Check if Dental Coverage is NOT a separate plan and move to the next question. ☐

Dental Plan Name: _____

MOST POPULATED DENTAL PLAN			
Coverage Type	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Maximum <i>annual</i> benefit <i>per covered member</i> (\$)
Employee Only			
Family			

22. If the medical plans listed above do not include vision coverage, please provide the following on the **MOST POPULATED** Vision Plan:

Check if Vision Coverage is NOT a separate plan and move to the next question. ☐

Vision Plan Name: _____

MOST POPULATED VISION PLAN		
Coverage Type	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)
Employee Only		
Family		

23. If medical, prescription, dental and vision benefits differ for employee groups, please identify those differences: _____

SHORT-TERM DISABILITY INSURANCE

24. Does your organization provide Short Term Disability Insurance? ☐ Yes ☐ No
If “Yes,” please provide the following information:

SHORT TERM DISABILITY		
Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Maximum number of weeks of coverage

LONG-TERM DISABILITY INSURANCE

25. Does your organization provide Long-Term Disability Insurance? ☐ Yes ☐ No
If “Yes,” please provide the following information:

LONG TERM DISABILITY		
Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Maximum number of weeks of coverage

Please go to the next page.

BASIC LIFE INSURANCE

26. Does your organization provide Basic Life Insurance? ☐ Yes ☐ No
If “Yes,” please provide the following information:

BASIC LIFE INSURANCE		
Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	What is the benefit amount (e.g., 2x annual salary)

RETIREMENT/DEFERRED SAVINGS PLANS

27. Please provide the following information regarding your Defined Contribution retirement plan (e.g., 401(a), 403(b), including the contribution rate for both the employer and the employee. If the employer contribution is a “match,” indicate the *maximum or limit* on the match.

a. Check if you do *not* offer a Defined Contribution Plan and move to the next question. ☐

b. If you do offer a Defined Contribution Plan, please provide the following:

DEFINED CONTRIBUTION PLAN		
Plan Name:	Percent of Pay (%)	Dollar Amount (\$)
Employer Contribution - % of pay or \$ (Not included in the maximum match below)		
Maximum Employer Match of Employee Contributions - % of pay or \$ (not included in the employer contribution above)		
Required Employee Contribution - % of pay or \$		
Voluntary Employee Contribution <u>Maximum</u> - % of pay or \$		

28. Please provide the following information regarding your Deferred Compensation/457 plans, including the contribution rate for both the employer and employee. If the employer contribution is a “match,” indicate the maximum or limit on the match.

a. Check if you do *not* offer a Deferred Compensation/457 Plan and move to the next question. ☐

b. If you do offer a Deferred Compensation/457 Plan, please provide the following:

DEFERRED COMPENSATION/457 PLAN		
Plan Name:	Percent of Pay (%)	Dollar Amount (\$)
Employer Contribution - % of pay or \$ (Not included in the maximum match below)		
Maximum Employer Match of Employee Contributions - % of pay or \$ (not included in the employer contribution above)		
Required Employee Contribution - % of pay or \$		
Voluntary Employee Contribution <u>Maximum</u> - % of pay or \$		

VACATION, SICK TIME, HOLIDAYS, AND OTHER LEAVE

29. Please indicate the number of accrued days per year for Vacation, Sick and Personal days for the following years of service.

Definition of Personal Days: Personal Days may be used for a paid or unpaid day of leave from work for reasons other than illness or vacation, taken at the employee's discretion.

Completed Years of Service	Vacation Days Accrued Per Year	Sick Days Accrued Per Year	Personal Days Accrued Per Year
<1 (As of Date of Hire)			
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			
25+			

30. When are vacation, sick and personal days accrued (bi-weekly, monthly, annually, etc.)? _____

Please go to next page

31. Please indicate which holidays are observed by your organization, by choosing “Yes” or “No” for each.

New Year's Day	Yes ☐	No ☐
Martin Luther King, Jr.'s Birthday	Yes ☐	No ☐
Presidents' Day	Yes ☐	No ☐
Good Friday	Yes ☐	No ☐
Memorial Day	Yes ☐	No ☐
Juneteenth National Independence Day	Yes ☐	No ☐
Independence Day	Yes ☐	No ☐
Labor Day	Yes ☐	No ☐
Columbus Day (also observed as Indigenous Peoples Day)	Yes ☐	No ☐
Election Day	Yes ☐	No ☐
Veterans Day	Yes ☐	No ☐
Thanksgiving Day	Yes ☐	No ☐
The Day After Thanksgiving	Yes ☐	No ☐
Christmas Eve	Yes ☐	No ☐
Christmas Day	Yes ☐	No ☐
New Year's Eve	Yes ☐	No ☐

32. How many floating holidays do employees receive each year (in addition to paid holidays, vacation, and sick leave; please include any additional days around Christmas Eve or Christmas Day in this number)? _____

OTHER BENEFITS

33. Please choose any of the following benefits your organization offers to employees. Choose all that apply.

- ☐ Retiree Health Insurance
- ☐ Tuition Reimbursement
- ☐ Paid Parental Leave or Paid Family Leave
- ☐ Paid Caregiver Leave
- ☐ Service Level Benefit (Longevity Pay)
- ☐ Employee Assistance Program
- ☐ Remote Work Policy
- ☐ Flexible Scheduling (e.g., 4 – 10-hour days, alternate start, and end times etc.)
- ☐ Sabbatical Leave
- ☐ Catastrophic Leave/Leave Donation

34. Does your organization pay for CDL training? Yes ☐ No ☐

If yes, does your organization have a policy or clause regarding employees reimbursing your organization at a pro-rated rate upon separation (e.g., separation under 8 months – 100% refunded to organization; 9-16 months - 66% refunded to organization, etc.?) Yes ☐ No ☐

35. Please describe any benefits that are meant to support employee wellness activities (e.g., wellness benefits, gym memberships, etc.): _____

36. Please describe any unique benefits offered by your organization that employees particularly enjoy (Examples might include: pet insurance, legal services, financial planning assistance, lifestyle reimbursement account, vacation buy-back program, ability to forfeit insurance coverage for higher salary, etc.) _____

37. Additional Comments: _____

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS SURVEY. THE CITY OF FOND DU LAC IS GREATFUL FOR YOUR EFFORTS, AND WE LOOK FORWARD TO SENDING YOU A FULL PARTICIPANT REPORT EARLY THIS SUMMER.

***Save your responses and send them to amylee@archercompany.com by INSERT DATE*

Exhibit 3

City of XYZ

Select Pay Practices and Benefits Custom Survey

Detailed Report of Responses and Archer Company Observations

5/26/2025



Table 1. Organization Information

1. Number of employees in your organization:
2. What is your annual operating budget for all funds?

Peer	# of Full Time Employees	# of Part Time/Seasonal Employees	Annual Budget - Full
City of Appleton	594	867	\$199,794,319
City of Beloit	350	170	\$116,954,839
City of Eau Claire	515	600	\$190,288,829
City of Green Bay	856	945	\$139,399,937
City of Janesville	461	206	\$133,373,786
City of Kenosha	822	370	\$104,745,943
City of Manitowoc	251	175	\$71,618,777
City of Oshkosh	457	61	\$953,692
City of Sheboygan	382	51	\$108,800,000
City of Wausau	360	50	\$46,030,541
City of Wauwatosa	418	297	\$79,635,637
City of West Bend	226	160	\$50,000,000
Market Average	474	329	\$103,466,358
City of XYZ	300	100	\$173,296,267

Data Effective Date: 4/9/2025

Footnotes: City of Janesville - amount includes internal service funds
City of Kenosha - FT is the # budgeted; current number of ees is 775
City of Wauwatosa - 235 of the 297 PT/Seasonal are Poll Workers

Table 2. Pay Structure

Please choose the answer below that best describes your pay structure (if you have multiple structures, please answer for the structure covering the largest number of employees)

Peer	Ranges Divided into Steps	Open Ranges	Steps - Lower Half Open Ranges - Upper Half	Other
City of Appleton		X		
City of Beloit		X		
City of Eau Claire	X			
City of Green Bay			X	
City of Janesville		X		
City of Kenosha	X			
City of Manitowoc		X		
City of Oshkosh	X			
City of Sheboygan	X			
City of Wausau	X			
City of Wauwatosa	X			
City of West Bend		X		
Number:	6	5	1	0
City of XYZ	X			

Data Effective Date: 4/9/2025

Notes:
Slightly more than one half of respondents use step-based plan, as is the practice at the City of XYZ. This "split" in practice, in our experience, is fairly consistent across city and county local government organizations. We tend to see "step plans" in non-represented groups more often when there is one or more union also within the organization.

Table 3. Pay Structure Adjustment Frequency

4. How often do you adjust your pay structure?

Peer	Annually	Every Other Year	Every Third Year	No Schedule	Other
City of Appleton	X				
City of Beloit	X				
City of Eau Claire	X				
City of Green Bay	X				
City of Janesville	X				X
City of Kenosha	X				
City of Manitowoc	X				
City of Oshkosh	X				
City of Sheboygan	X				
City of Wausau	X				
City of Wauwatosa	X				
City of West Bend	X				
Number:	12	0	0	0	1
City of XYZ	X				

Data Effective Date: 4/9/2025

Footnotes: City of Janesville - COLA annually, comp study every 5 years

Notes:
Virtually all organizations adjust their pay structures annually.

Table 4. Pay Structure Adjustment - Data Source

5. What index or data source does your organization use to determine the pay structure amount? We are referring to the amount the pay ranges themselves are adjusted periodically (Check all that apply):

Peer	Consumer Price Index (CPI)	Employer Cost Index (ECI)	COLA or Across the Board Increase	World at Work, Other Major Survey, or Compensation Consulting Firm	Other	Notes
City of Appleton					X	
City of Beloit			X			
City of Eau Claire			X			
City of Green Bay			X			
City of Janesville				X		
City of Kenosha					X	Based on available budget funds for non- represented. Union employees is based on comps and available funds
City of Manitowoc			X			
City of Oshkosh			X			
City of Sheboygan			X			
City of Wausau			X			
City of Wauwatosa			X			
City of West Bend			X			
Number:	0	0	9	1	2	
City of XYZ			X			

Data Effective Date: 4/9/2025

Footnotes:

Notes: Open ranges are in place at Appleton, Beloit, Janesville, Manitowoc and the City of West Bend. We note that in these cities, all but Janesville apply the same percentage to the structure as they provide to employees in the form of a COLA/ATB increase. This is a potential concern as it means that employees are not moving within their pay ranges over time. At XYZ, the combination of step increases and across-the-board increases prevent that issue as long as the City fairly routinely funds both type of increases.

Table 5. Starting Wage Above Minimum

6. Do you allow new employees to start at a wage or salary amount higher than the Salary Range Minimum? If “yes,” how is starting salary determined?

Peer	Yes	No	Salary Determination
City of Appleton	X		Entrance pay rate shall be within 60% of the minimum of the pay range.
City of Beloit	X		For Union positions - salary determined by Labor Agreement. For non-represented positions - new employees with minimal experience will generally earn the range minimum. can be offered a starting salary between the minimum and mid-point of the range according to Class & Comp plan as discussed and agreed upon by the hiring supervisor and the Human Resources Department.
City of Eau Claire	X		Typically Step 1 is offered and may negotiate a higher step based on experience of individual and also factor in where current employees are on the scale.
City of Green Bay	X		We may start a new employee higher than the minimum for their position if it can be justified based on experience
City of Janesville	X		Dependent on position and experience/qualifications at time of hire
City of Kenosha	X		Based on budget for position, equity within department and experience of candidate
City of Manitowoc	X		Based on experience and skills
City of Oshkosh	X		Based on years of experience, education, verifications, and any relevant skills that might put them in a higher pay range.
City of Sheboygan	X		No higher than midpoint unless approved by City Administrator
City of Wausau	X		experience
City of Wauwatosa	X		Based on internal equity review & the incoming new employee's experience.
City of West Bend	X		Department Head, HR Director and Administrator - Experience of the candidate. Maximum we can start an employee is Market rate (mid). Anything higher has to be approved by Council.
Number:	12	0	
City of XYZ	X		Knowledge, skills & abilities

Data Effective Date: 4/9/2025

Footnotes:

Notes:

All of the City's peers have a provision for bringing in new employees above the Range Minimum. The common denominators, in terms of rationale, are experience and education, relevant skills, and in many cases an analysis of the pay of current employees within the same job title. Some responses also indicate that pay offers up to Midpoint can be considered, depending on these factors and considerations.

Table 6. Overtime Policy for Exempt Employees

7. Please check the answer that best describes your organization's "pay" policy for hours worked above the normal workweek for FLSA-exempt professional, supervisory, and

Peer	None	Comp Time - 1 hour accrued for 1 hour worked	Comp Time - 1.5 hours accrued for 1 hour worked	Flex Time	Pay - 1 hour additional pay for 1 hour worked	Pay - 1.5 hours additional pay for 1 hour worked	Additional Vacation/Personal /PTO	Other	Notes
City of Appleton	X								
City of Beloit	X								
City of Eau Claire								X	Managers and above typically do not receive extra pay or comp time. Front-line supervisors are allowed comp/OT at 1.5 in circumstances outside the typical day.
City of Green Bay		X		X					
City of Janesville				X			X		
City of Kenosha								X	Excluding dept heads, we provide 1.5 comp time after 40 hours and 2x for Sundays and holidays (not part of regular schedule) for department related work up to 80 hours. For outside department work, employees are compensated at their rate of pay @ 1.5 or 2x. Departments who budget for cash overtime, exempt employees are paid cash OT after 80 hours of earned comp time
City of Manitowoc	X								
City of Oshkosh	X			X					
City of Sheboygan	X								
City of Wausau				X					
City of Wauwatosa				X					
City of West Bend	X						X		
Number:	6	1	0	5	0	0	2	2	
City of XYZ				X					

Data Effective Date: 4/9/2025

Footnotes:

Notes:
Nearly 50% of the cities allow "flex time", as does the City of XYZ. Fifty percent (50%) of the peers have no policy or provision for "compensating" exempt employees for hours above their regular schedule. For those organizations that do offer compensation, the most prevalent practice is flex time, with nearly fifty percent (50%) of the peers offering one or more other plans or programs without any other strong prevalent practice or policy.

Table 7. Shift Differentials

8. If your organization offers shift differential pay for evenings, nights and/or weekends, please provide the following information:

Peer	Eligible Positions	Evening	Night	Weekend
City of Appleton	non-exempt employees regularly scheduled for a 2nd or 3rd shift	\$0.50/hr	\$0.50/hr	Double time for Sunday shifts
City of Beloit	Non-represented (Sundays); Public Works- 3rd shift (winter only)		\$4.00/hr	
City of Beloit	Police Department non-sworn 2nd and 3rd shift	\$0.20/hr	\$0.30/hr	Non-rep Sundays- 2x regular rate
City of Eau Claire	Custodians	\$0.30/hr	\$0.30/hr	
City of Eau Claire	Police Command	\$0.15/hr	\$0.50/hr	
City of Green Bay	Cleaners, Custodians, Building Services Coordinator, Operator 1 & 2, Records Clerk, Office Clerk, Evidence Tech, Admin Clerk, Dispatcher	\$0.30/hr	\$0.50/hr	\$1.50/hr
City of Janesville				
City of Kenosha	Mechanics in winter			
City of Manitowoc	Laborers, Bridgetenders, Building & Grounds, Mechanics, Engineering Field Staff, Police Lts & Cpts	\$0.25/hr	\$0.35/hr	
City of Oshkosh	Public Works and PD			N/A
City of Sheboygan	Non exempt, non represented employees working between 6:00 pm - 5:59 am	\$0.40/hr	\$0.40/hr	N/A
City of Wausau	Police Officer		1%	
City of Wausau	Department of Public Works	\$1.45/hr	\$1.60/hr	N/A
City of Wauwatosa	Public Works employees that are scheduled for something other than first shift. Non-sworn police employees are also eligible.	\$0.25/hr	\$0.30/hr	N/A
City of West Bend	Police Officers, Detectives	\$40/month	\$50/month	
Market Average		\$0.42/hr	\$0.88/hr	
Protective Services Average		\$0.20/hr	\$0.38/hr	
City of XYZ	Protective service	\$0.09/hr; \$0.24/hr	\$0.20/hr	

Data Effective Date: 4/9/2025

Footnotes: City of Beloit - Weekend rate does not apply to positions that work 365-day operations

City of Green Bay - provided grid with details for each position

City of Manitowoc - Police Lts & Cpts receive a monthly amount, \$46 for 2nd shift & \$56 for 3rd shift

City of Sheboygan - Represented employees have shift premium per their contract

City Wauwatosa - We also have a \$1.00/hour flex pay that we add to employees that are assigned to second or third shift as their regular schedule at DPW that is paid in addition to the shift differential

City of West Bend - Information entered in "Weekend" was for call-in pay not shift differential, chose to put here & in Call In table rather than in this table - I also removed the positions that would be included from the "eligible" field (Public Works Tech I/Crew Leader/Signal Tech, Sewer and Water Operations Specialists, Building Maintenance Tech): "Public Works - 1 hr pay on Fridays; 4 hrs each day Sat/Sun/holiday; Water - 8 hrs each day; Sewer - 8 hrs/wk and 4 hrs/holiday; or Public Works employees, they get paid to hold the phone and be limited for the weekend. If they receive a call and come in, they are paid a minimum of 2 hours."

City of XYZ - 2:30 p.m. - 11:30 p.m. \$7.02; 10:30 p.m. - 7:30 a.m. \$18.56; 7 p.m. - 4 a.m. - \$15.50

Notes:

All but one peer have a policy for the payment of evening, night and/or weekend pay differentials. The use of a certain amount of cents per hour is the prevalent practice. Eligible positions vary but tend to be public works roles and in some cases sworn law enforcement roles. it appears the City of Fond du Lac's evening and night shift premium for Protective Service roles are within the "competitive range" for evening shift but notably blow the "Protective Services" market average for the night shift at this point in time.B12

Table 8. Bilingual Pay

9. If your organization offers a bilingual pay program, please provide the following information:

Peer	Eligible Positions	Type of Remuneration	Languages Included	Proficiency Test Required
City of Appleton	N/A	N/A	N/A	N/A
City of Beloit	Municipal Court Clerk	\$125.00/month	Spanish	N/A
City of Eau Claire	All non-Union positions	Monthly payment	All	Yes
City of Green Bay	N/A	N/A	N/A	N/A
City of Janesville	N/A	N/A	N/A	N/A
City of Kenosha	N/A	N/A	N/A	N/A
City of Manitowoc	N/A	N/A	N/A	N/A
City of Oshkosh	N/A	N/A	N/A	N/A
City of Sheboygan	N/A	N/A	N/A	N/A
City of Wausau	N/A	N/A	N/A	N/A
City of Wauwatosa	N/A	N/A	N/A	N/A
City of West Bend	N/A	N/A	N/A	N/A
City of XYZ	N/A			

Data Effective Date: 4/9/2025

Footnotes: City of Janesville - Policy document provided

Notes:

Only two of twelve reporting peers have any kind of compensation program for use of bilingual skills, The position eligibility is different between the two peers an we only received one actual amount. Fond du Lack's lack of program for bilingual skills is consistent with the prevalent market practice.

Table 9. Compensation Practice for Different Annual Hours

10. Please choose the option that best describes your compensation practice for employees working different ANNUAL hours.

Peer	N/A	Employees are paid the SAME HOURLY RATE, but would receive DIFFERENT ANNUAL EARNINGS	Employees are paid the DIFFERENT HOURLY RATE, in order to receive the SAME ANNUAL EARNINGS	Other	Notes
City of Appleton		X			
City of Beloit		X			
City of Eau Claire		X	X		Telecommunicators, Fire BC, Police Sgt/Lt are paid different hourly rate, but same annual. Utility Operator at Water Plant are paid at same hourly rate, but different annual.
City of Green Bay		X			
City of Janesville		X			
City of Kenosha	X				
City of Manitowoc				X	Employees have different rates of pay, not determined by a 2080 or 1950 hour schedule
City of Oshkosh	X				
City of Sheboygan		X			
City of Wausau		X			
City of Wauwatosa		X			
City of West Bend				X	This is very limited. The part-time custodians are paid a lower rate than the full-time ones. The PTO schedule is based on hours - 1/2 time receive half the hours a full-time employee has.
Number:	2	8	1	2	
City of XYZ			X		

Data Effective Date: 4/9/2025

Footnotes: City of Kenosha - Response is for non rep employees; Union employees may differ depending CBA (there are 4 - if needed, they are at https://www.kenosha.org/departments/human_resources/policies___procedures.php#outer-5)

Notes:

The majority of peer organizations appear to adjust pay for employees based on the number of annual hours. The City's practice of maintaining the same annual pay for different annual hours worked is not consistent with the majority of the City's peers. This generally is a potential equity for non-sworn jobs. This can be especially true in cases where employees performing similar work in different departments with different annual hour schedules, are earning the same annual salary, as opposed to prorating the employees who work fewer hours annually.

Table 10. Bonuses

11. Do you offer bonuses for any of the following? If so, please indicate the payment type:

Peer	Hiring			Retention			Referral			High Performer			Performance based on Organization Goals			Performance based on Departmental Goals			Performance based on Individual Goals		
	Yes/No	% of Base or Lump Sum?	Amount	Yes/No	% of Base or Lump Sum?	Amount	Yes/No	% of Base or Lump Sum?	Amount	Yes/No	% of Base or Lump Sum?	Amount	Yes/No	% of Base or Lump Sum?	Amount	Yes/No	% of Base or Lump Sum?	Amount	Yes/No	% of Base or Lump Sum?	Amount
City of Appleton	No			No			No			No			No			No			No		
City of Beloit	No			No			No			No			No			No			No		
City of Eau Claire	No			No			No			No			No			No			No		
City of Green Bay	No			No			Yes	Lump Sum	\$1,000	No			No			No			No		
City of Janesville	No			No			No			No			No			No			No		
City of Kenosha													Yes	Lump Sum	\$125/month						
City of Manitowoc	No			No			No			Yes	% of Base	1%	No			No			No		
City of Oshkosh	No			No			No			No			YES	Employees choose		No			No		
City of Sheboygan	No			No			No			No			No			No			No		
City of Wausau	Yes	Varies		No			No			No			No			No			No		
City of Wauwatosa	Yes/No	Lump Sum	\$1,000-2,500	Yes	% of Base	Varies	Yes	Lump Sum	\$500-1,000	Yes	% of Base	Extra Step Increase/Double Bump at Time of Performance Reviews	No			No			No		
City of West Bend	No			No			No			No			No			No			No		
Number of "Yes" Responses:	1			1			2			2			2			0			0		
City of XYZ							Yes	Lump Sum	\$1,000												

Data Effective Date: 4/9/2025

Footnotes: City of Appleton - "No official policy or program"
City of Green Bay - For Bus Operators only, policy provided

Notes:
The market data indicates that none of these bonus programs are used widely among the City's peers. The City's lack of programs in these areas is consistent with the City's peers. The City's Referral Bonus Program is a "market-leading" compensation program that may give the City a competitive advantage as well as assist in finding high quality candidates.

Table 11. Longevity/Years of Service

12. Does your organization offer monetary recognition for longevity/years of service? If yes, please indicate, for each level of Years of Service, how the longevity is rewarded:

Peer	Offered? Yes or No	After 5 Years				After 10 Years				After 15 Years				After 20 Years				After 25 Years				After 30 Years			
		Bonus Payment		Base Salary Increase		Bonus Payment		Base Salary Increase		Bonus Payment		Base Salary Increase		Bonus Payment		Base Salary Increase		Bonus Payment		Base Salary Increase		Bonus Payment		Base Salary Increase	
		Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)	Amount (\$)	Percentage (%)
City of Appleton	No																								
City of Beloit	Yes				3.0%				3.0%				3.0%				3.0%				3.0%				3.0%
City of Eau Claire	No																								
City of Green Bay	No																								
City of Janesville	Yes	\$250.00				\$500.00				\$750.00				\$1,000.00				\$1,250.00				\$1,500.00			
City of Kenosha	No																								
City of Manitowoc	Yes					\$2,500.00																			
City of Oshkosh	Yes	\$25.00				\$50.00				\$75.00				\$100.00				\$125.00				\$150.00			
City of Sheboygan	No																								
City of Wausau	Yes				0.3%				0.6%				0.9%				1.2%				1.5%				
City of Wauwatosa	No																								
City of West Bend	Yes	\$5.00				\$30.00				\$55.00				\$55.00				\$55.00				\$55.00			
Market:	6	\$93.33			2%	\$770.00			2%	\$293.33			2%	\$385.00			2%	\$476.67			2%	\$568.33			3%
City of XYZ	Yes	The City utilizes the step plan structure as a mechanism for rewarding longevity																							

Data Effective Date: 4/9/2025

Footnotes: City of West Bend - Amounts are monthly

Notes:
Fifty percent (50%) of the City's peers offer a Longevity program of some sort and we see a slightly stronger use of one time bonus payments over base salary increases. Overall, the Archer Company is seeing an increase in the use of Longevity programs and the use of a step plan, such as utilized at XYZ, is one common option for rewarding longevity in one's job. Archer Company recommendations will serve to align the step structure more closely to market competitive longevity programs.

Table 12. On Call/Stand by Pay

13. If your organization offers on-call or "stand-by" pay and/or "call-in" pay, please provide the following information:

Pear	Offered?	Eligible Departments/Positions	On-Call Remuneration	On-Call Amount	Additional Compensation If Called In?	Call In Amount	Notes
City of Appleton	Yes	Various positions in DPW, Fire, IT, Police, Utilities,	regular hourly rate	1 hour pay for each day of stand-by and 2 hours if on actual designated city holiday	No	Non-Exempt - \$100 Exempt - \$75 - \$500	Additional Compensation for Emergency Call Ins Only: Non-exempt employees who have left the worksite or are in a paid leave status, and who are called to return to work outside of their regularly scheduled hours to handle emergency situations that could not be anticipated, eligible for lump sum of \$100; Exempt employees receive \$75 lump sum for less than 3 hours; \$200 for 3-5 hours; \$400 for 5-8 hours; \$500 for more than 8 hours.
City of Beloit	Yes	Public Works- Supervisors	lump sum/day	\$40/day	No	Non-Exempt - regular hourly rate; OT rate if over 40	
City of Eau Claire	Yes	Varies by Division					
City of Green Bay	Yes	Parks, Recreation & Forestry, Public Works	Some regular hourly rate, some lump sum, depending on position	Hourly - 2 or 3 hrs pay Lump sum - \$75-112.50	Yes	Depending on Position: 2 hr minimum; OT rate for over 40; Regular Rate for hrs worked	On-Call: Electrician, Electrician Foreperson, Sewer Maintenance Worker, Sewer Maintenance Foreperson = 7 week rotations from Monday 7AM-Monday 7AM with Additional 2 hours of pay (straight time) for Monday-Thursday, Additional 3 hours of pay (straight time) for Friday-Sunday, 1 Hour extra for holidays; Public Works Superintendents, Public Works Supervisors = 8 week rotation from Monday 6:30AM-Monday 6:30A with no additional compensation; Parks Mechanics = On-Call/Standby and when required for certain situations, mechanics receive 3 hours regular pay per day when required to be on call; Forestry Supervisors, Arborist II = On-Call/Standby When carrying on-call phone Friday-Sunday, paid \$75.00/day, \$37.50 for weekday holidays, and \$112.50 for weekend holidays Call Ins: Electrician, Electrician Foreperson, Sewer Maintenance Worker, Sewer Maintenance Foreperson = time and a half after 40hours/week worked. Public Works Superintendents, Public Works Supervisors = Compensation (straight time) for actual time spent performing call-in duties in the field or at workplace and for meeting attendance outside of normal working hours. Supervisors and Superintendents are encouraged to use flex time and compensatory time in lieu of overtime compensation. Parks Maintenance Workers, Mechanics, Maintenance Specialists = Minimum of 2 hours pay at regular rate if called in outside of work hours.
City of Janesville	Yes	Public Works Field Employees			Yes	2 hr minimum at current rate of pay	
City of Kenosha	Yes	DPW/ Transit	DPW - hourly Transit - hourly	DPW - 1.75/hour Transit - OT (1.5) rate	Yes	DPW - 2 hr minimum Transit - 2 hr minimum	week rotation at a time/depends on amount of people required and situation (ex: street light out involves more people) and would move to bottom of rotation - on call is throughout the year
City of Manitowoc	Yes	DPI	lump sum	\$50/day (but paid at entire week - \$350)	Yes	Hourly Rate	On call period is weekly
City of Oshkosh	Yes	Public Works	hourly rate	hourly rate	Yes	1.5 hourly rate	
City of Sheboygan	Yes	On call: WW technicians, electricians, DPW foremen. Call in: non-exempt employees	lump sum	\$25/day	Yes	OT hourly rate - 2 hr minimum	
City of Wausau	Yes	DPW	lump sum		Yes	OT	
City of Wauwatosa	Yes	Some DPW positions offer this (street operations, parks)	hourly rate	OT	Yes	2 hr minimum	employees can bank as OTO or have it paid 1.5; Parks employees are on a one-week call rotation where they switch a phone between 4 team members. Our DPW Maintenance positions get called in for snowplowing based on a rotating list based on who was last called in. Our DPW Supervisors participate in a more traditional rotation, which I believe is a weekend rotation every four weeks.
City of West Bend	Yes	Public Works Tech I, Signal Technician, Sewer Operations Spec, Water Operations Spec, and Building Maintenance Tech	hourly rate	regular hourly rate - depending on department - generally 1 hour for Friday, 4 hours for each Sat/Sun/Hol - except Water is 8 hours for each Sat/Sun/Hol.	Yes	2 hr minimum at OT rate	
Number of Yes Responses:	12				7		
City of XYZ	Yes	DPW		2.50 for every hour on-call for all DPW except Transit who receive 3.00 per hour	No		On call period is weekly

Data Effective Date: 4/9/2025

Footnotes: City of Appleton - Provided list of 50 job titles;
City of Kenosha - DPW has 2 ppl on call 24/7 365; Transit information from CBA

Notes:
All peers, and the City of XYZ have some version of a pay program of "on-call" and "call-in" situations. The City's provision of two hours minimum pay for call-in incidents is consistent with the prevalent market practice. The form of payment for on-call varies considerably including per hour payments, per day payments, and per week payments.

Table 13. Highly Specialized Positions

14 a. Does your organization have a policy for compensating positions that are either highly specialized, hard to fill, or simply in demand?
b. If "Yes," please indicate which actions you take to recruit and retain employees in these positions in the following categories:

Peer	Offered? Yes or No	Salaries targeted higher in pay grade			Special Pay Grade Structure Defined			Skill Premium Paid in Addition to Base Pay			Hire On Bonus Paid			Retention Bonus Paid			Other (please specify)		
		Non-Exempt	Exempt - Individual Contributor	Manager or Supervisor	Non-Exempt	Exempt - Individual Contributor	Manager or Supervisor	Non-Exempt	Exempt - Individual Contributor	Manager or Supervisor	Non-Exempt	Exempt - Individual Contributor	Manager or Supervisor	Non-Exempt	Exempt - Individual Contributor	Manager or Supervisor	Non-Exempt	Exempt - Individual Contributor	Manager or Supervisor
City of Appleton	No																		
City of Beloit	No																		
City of Eau Claire	Yes	X	X	X															
City of Green Bay	No																		
City of Janesville	No																		
City of Kenosha	No																		
City of Manitowoc	No																		
City of Oshkosh	No																		
City of Sheboygan	No																		
City of Wausau	No																		
City of Wauwatosa	No																		
City of West Bend	Yes	X	X	X	X			X									Start Water/Sewer Ops at market rate		
Number:	2	2	2	2	1	0	0	1	0	0	0	0	0	0	0	0	1	0	0
City of XYZ	No																		

Data Effective Date: 4/9/2025
Footnotes:

Notes:
Only two peers indicate a policy or protocol for hard-to-fill, specialized roles. The City's lack of policy in this area is consistent with the prevalent market practice. Where there is a policy, the use of higher salaries within existing ranges was reported by both of the organizations with a policy.

Table 14. Balance

15. How do you balance competitive compensation with budgeting constraints and funding limitations?

Peer	Response
City of Appleton	We review and revise our pay plan typically on an annual basis and conduct equity reviews as needed.
City of Beloit	rich benefits package, emphasize WRS and other items we can provide as public-sector employees
City of Eau Claire	
City of Green Bay	We conduct regular salary studies and share the information with our Common Council. Adjustments to the Pay Plan are made with the annual budget
City of Janesville	Consider the experience/qualifications at time of hire and discuss with management rather the budget can sustain a higher wage
City of Kenosha	
City of Manitowoc	We have a non-lapsing fund to address compensation needs.
City of Oshkosh	We have a pay scale that is available to the public, though we try to offer a higher step. On average we hire new employees at step 2-4. Though recently with the demand for increase pay there are many times we are offering at step 4-6 if they're skill/education allow.
City of Sheboygan	PTO/Benefits
City of Wausau	
City of Wauwatosa	We understand that having competitive compensation and benefits will allow us to attract and retain talented employees. We prioritize this as an organization and make sure to prioritize compensation and benefits within the budget.
City of West Bend	carefully. No true answer, depends on the department and the position.
City of XYZ	probationary step increases - 3, 6, 9 month increments; varies upon candidate

Data Effective Date: 4/9/2025

Footnotes:

Notes:

There are a number of strategies in place as reported by the responding peer organizations. The City's probationary step increase policy seems unique in this group but certainly is a tool in the City's toolkit to aid in candidate attraction.

Table 15. Reclassification

16. a. Do you have a formal salary administration policy for reclassifications (situations where jobs change suddenly or gradually)?
- b. If yes, what is the typical increase or range of possible increases you give to employees whose jobs are reclassified?

Peer	Formal Policy		One Grade Increase		Two or More Grade Increase	
	Yes	No	Percentage	Percentage Range	Percentage	Percentage Range
City of Appleton		X				
City of Beloit		X				
City of Eau Claire	X		5%			
City of Green Bay		X				
City of Janesville	X		0%		0%	
City of Kenosha	X		5%		5%	
City of Manitowoc	X			5-10%		5-10%
City of Oshkosh	X					
City of Sheboygan	X					
City of Wausau		X				
City of Wauwatosa	X		10%		10%	
City of West Bend		X				
Number & Market Average:	7	4	5%		5%	
City of XYZ	X			Fall into new grade at closest step to previous wage		

Data Effective Date: 4/9/2025

Footnotes: City of Janesville - not a guaranteed percentage increase - move to min of new range if not already there; email with policy provided

City of Sheboygan - we send to a consultant to determine new grade - no max or minimum

Notes:

Fifty-eight percent (58%) of peers have a formal promotion pay policy but only a few provided details. In this limited dataset, conclusions are hard to draw. General data from large compensation surveys such as WorldatWork (average promotional increase was 8.0% in 2024) and Mercer (average promotional increase for a one level promotion is 8.5% - March 2025 U.S. Compensation Planning Survey) suggest an increase in the City's policy would make the policy more market-competitive. We think the City may want to consider a policy change to set a minimum percentage amount, and then move employee to the next closest step.

Table 16. Type of Health Coverage Plans

17. Please provide the following information regarding the MOST POPULATED health insurance plan you offer:

Peer	HMO	PPO	CDHP/HDHP	PSO
City of Appleton			X	
City of Beloit		X		
City of Eau Claire	X			
City of Green Bay		X		
City of Janesville	X			
City of Kenosha			X	
City of Manitowoc			X	
City of Oshkosh		X		
City of Sheboygan			X	
City of Wausau			X	
City of Wauwatosa		X		
City of West Bend		X		
Number:	2	5	5	0
City of XYZ		X		

Data Effective Date: 4/9/2025

Footnotes:

Notes:

Table 17. Health Plan Detail by Coverage Type

18. For the MOST POPULATED plan, as indicated above, please provide the following information:

Employee Only Coverage:									
Peer	Plan Type	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)	Notes
City of Appleton	HDHP	UMR	\$690.19	\$69.02	\$759.21	91%	9%	\$3,000	In its health care program, the City: 1. Provides access to the Corporate Care Clinic located in XYZ and covers 100% of costs for nine types of visits/services 2. Provides access to Teledoc, which is an online medical service, at no cost to employees 3. More recently has begun using Garner, a service which helps employees choose highly-rated doctors. If the employee chooses one of the doctors recommended on the Garner app, the employee is reimbursed for up to \$2,000 single, \$4,000 family, for co-pays and deductibles, including prescriptions that the rated doctor issues 4. Provides free access to ATI physical therapy for employees, with no referral required, for up to 25 visits
City of Beloit	PPO	Self-funded Anthem BCBS Network	\$852.59	\$94.73	\$947.32	90%	10%	\$1,500	
City of Eau Claire	HMO	Group Health Coop of Eau Claire	\$902.00	\$160.00	\$1,062.00	85%	15%	\$2,900	
City of Green Bay	PPO	UMR	\$597.80	\$149.45	\$747.25	80%	20%	\$4,000	
City of Janesville	HMO		\$754.54	\$116.44	\$870.98	87%	13%		
City of Kenosha	HDHP	Self-funded	\$1,591.67	\$0.00	\$1,591.67	100%	0%	\$2,500	
City of Manitowoc	HDHP		\$756.58	\$108.08	\$864.66	88%	12%	\$4,250	
City of Oshkosh	PPO		\$58.71	\$430.54	\$489.25	12%	88%	\$4,000	
City of Sheboygan	HDHP	UMR	\$834.86	\$80.04	\$914.90	91%	9%	\$3,650	
City of Wausau	HDHP		\$711.70	\$97.09	\$808.79	88%	12%	\$2,650	
City of Wauwatosa	PPO	UHC-NexusACO	\$697.42	\$123.07	\$820.49	85%	15%	\$5,500	
City of West Bend	PPO		\$692.86	\$100.00	\$792.86	87%	13%	\$5,000	
City of XYZ	PPO		\$818.00	\$133.00	\$951.00	86%	14%	\$4,000	
Market Average:			\$761.74	\$127.37	\$889.12	82%	18%	\$3,541	
XYZ as % of Mkt Avg:			107%	104%	107%	105%	78%	113%	

Data Effective Date: 4/9/2025

Footnotes: City of Janesville - Provided "deductible/coinsurance amount" of 1200 - didn't enter in the grid because it wasn't what we asked for
City of Kenosha - sets aside 19,100 annually for eligible employees; divided by 12 to get monthly amount;

Notes:
The City of Fond du Lac's total Employee Only Monthly Premium (both Employer and Employee contributions) are about 7% above the market average for PPO plans. From a contribution standpoint the City requires a lower percentage contribution from employees compared to the peer market average. The City's Maximum out-of-pocket is about 13% above the market average, representing about a \$458 dollar additional annual employee obligation at the City compared to the market average. The additional health care services provided by the City, described under the "Notes" column add significant value to the City's employees, as well as additional financial investment on the part of the City.

Employee + Spouse Coverage:									
Peer	Plan Type	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)	Notes
City of Appleton	HDHP	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
City of Beloit	PPO	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
City of Eau Claire	HMO	Group Health Coop of Eau Claire	\$334.00	\$1,890.00	\$2,224.00	15%	85%	\$5,800	
City of Green Bay	PPO								
City of Janesville	HMO		N/A	N/A	N/A	N/A	N/A	N/A	
City of Kenosha	HDHP	Self-funded	\$1,591.67	\$0.00	\$1,591.67	100%	0%	\$5,000	
City of Manitowoc	HDHP								
City of Oshkosh	PPO		\$118.37	\$868.09	\$986.46	12%	88%	\$8,000	
City of Sheboygan	HDHP	UMR	\$1,588.26	\$152.30	\$1,740.56	91%	9%	\$7,300	
City of Wausau	HDHP								
City of Wauwatosa	PPO	UHC-NexusACO	\$1,743.55	\$307.68	\$2,051.23	85%	15%	\$11,000	
City of West Bend	PPO		\$1,909.72	\$200.00	\$2,109.72	91%	9%	\$10,000	
City of XYZ	PPO		N/A	N/A	N/A	N/A	N/A	N/A	
Market Average:			\$1,214.26	\$569.68	\$1,783.94	66%	34%	\$7,850	
XYZ as % of Mkt Avg:			N/A	N/A	N/A	N/A	N/A	N/A	

Data Effective Date: 4/9/2025

Footnotes: City of Kenosha - sets aside 19,100 annually for eligible employees; divided by 12 to get monthly amount;

Notes:
Provided for information only; XYZ does not have this tier in its health plan

Employee + Child Coverage:									
Peer	Plan Type	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)	Notes
City of Appleton	HDHP	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
City of Beloit	PPO	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
City of Eau Claire	HMO	Group Health Coop of Eau Claire	\$334.00	\$1,890.00	\$2,224.00	15%	85%	\$5,800	
City of Green Bay	PPO								
City of Janesville	HMO		N/A	N/A	N/A	N/A	N/A	N/A	
City of Kenosha	HDHP	Self-funded	\$1,591.67	\$0.00	\$1,591.67	100%	0%	\$5,000	
City of Manitowoc	HDHP								
City of Oshkosh	PPO		\$118.37	\$868.09	\$986.46	12%	88%	\$8,000	
City of Sheboygan	HDHP	UMR	\$1,439.72	\$138.06	\$1,577.78	91%	9%	\$7,300	
City of Wausau	HDHP								
City of Wauwatosa	PPO	UHC-NexusACO	\$1,394.84	\$246.15	\$1,640.99	85%	15%	\$11,000	
City of West Bend	PPO		\$1,909.72	\$200.00	\$2,109.72	91%	9%	\$10,000	
City of XYZ	PPO		N/A	N/A	N/A	N/A	N/A	N/A	
Market Average:			\$1,131.39	\$557.05	\$1,688.44	66%	34%	\$7,850	
XYZ as % of Mkt Avg:			N/A	N/A	N/A	N/A	N/A	N/A	

Data Effective Date: 4/9/2025

Footnotes: City of Kenosha - sets aside 19,100 annually for eligible employees; divided by 12 to get monthly amount;

Notes:
Provided for information only; XYZ does not have this tier in its health plan

Employee + Family Coverage:									
Peer	Plan Type	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)	Notes
City of Appleton	HDHP	UMR	\$1,788.82	\$178.88	\$1,967.70	91%	9%	\$6,000	
City of Beloit	PPO	Self-funded Anthem BCBS Network	\$2,135.11	\$237.23	\$2,372.34	90%	10%	\$3,700	
City of Eau Claire	HMO	Group Health Coop of Eau Claire	\$405.00	\$2,347.00	\$2,752.00	15%	85%	\$5,800	
City of Green Bay	PPO	UMR	\$1,448.02	\$362.00	\$1,810.02	80%	20%	\$8,000	
City of Janesville	HMO		\$246.36	\$1,972.10	\$2,218.46	11%	89%		
City of Kenosha	HDHP	Self-funded	\$1,591.67	\$0.00	\$1,591.67	100%	0%	\$5,000	
City of Manitowoc	HDHP		\$1,918.11	\$274.02	\$2,192.13	87%	13%	\$8,500	
City of Oshkosh	PPO		\$147.58	\$1,082.26	\$1,229.84	12%	88%	\$8,000	
City of Sheboygan	HDHP	UMR	\$2,194.72	\$210.44	\$2,405.16	91%	9%	\$7,300	
City of Wausau	HDHP		\$2,192.07	\$298.92	\$2,490.99	88%	12%	\$5,300	
City of Wauwatosa	PPO	UHC-NexusACO	\$2,379.43	\$356.91	\$2,736.34	87%	13%	\$11,000	
City of West Bend	PPO		\$1,909.72	\$200.00	\$2,109.72	91%	9%	\$10,000	
City of XYZ	PPO		\$2,125.00	\$346.00	\$2,471.00	86%	14%	\$8,000	In its health care program, the City: 1. Provides access to the Corporate Care Clinic located in XYZ and covers 100% of costs for nine types of visits/services 2. Provides access to Teledoc, which is an online medical service, at no cost to employees 3. More recently has begun using Garner, a service which helps employees choose highly-rated doctors. If the employee chooses one of the doctors recommended on the Garner app, the employee is reimbursed for up to \$2,000 single, \$4,000 family, for co-pays and deductibles, including prescriptions that the rated doctor issues 4. Provides free access to ATI physical therapy for employees, with no referral required, for up to 25 visits
Market Average:			\$1,529.72	\$626.65	\$2,156.36	70%	30%	\$7,145	
XYZ as % of Mkt Avg:			139%	55%	115%	122%	47%	112%	

Data Effective Date: 4/9/2025

Footnotes: City of Janesville - Provided "deductible/coinsurance amount" of 3000 - didn't enter in the grid because it wasn't what we asked for
City of Kenosha - sets aside 19,100 annually for eligible employees; divided by 12 to get monthly amount;

Notes:
The City of Fond du Lac's total Family Coverage Monthly Premium (both Employer and Employee contributions) is about 15% above the market average for PPO plans. From a contribution standpoint the City requires a significantly lower percentage contribution from employees, and therefore contributes a significantly higher employer contribution, compared to the peer market averages. The City's Maximum out-of-pocket is about 12% above the market average, representing about a \$855 dollar additional annual employee obligation at the City compared to the market average. The additional health care services provided by the City, described under the "Notes" column add significant value to the City's employees, as well as additional financial investment on the part of the City.

Table 18. HSA Contribution

19. If you offer a high deductible plan, please indicate the employer annual \$ contribution amount to a Health Savings Account (HSA) or Health Reimbursement Account (HRA) for each category. If your organization does not contribute to an HSA or HRA, enter "N/A."

Peer	Employee Only (\$)	Employee + Spouse (\$)	Employee + Child (\$)	Employee + Family (\$)
City of Appleton	\$120	N/A	N/A	\$120
City of Beloit	\$500	N/A	N/A	\$1,000
City of Eau Claire	\$0	\$0	\$0	\$0
City of Green Bay	\$0	N/A	N/A	\$0
City of Janesville	\$0	N/A	N/A	\$0
City of Kenosha	\$0	\$0	\$0	\$0
City of Manitowoc	\$800	\$1,600	\$0	\$0
City of Oshkosh	\$0	\$0	\$0	\$0
City of Sheboygan	\$750	\$1,500	\$1,500	\$1,500
City of Wausau	\$600	N/A	N/A	\$1,200
City of Wauwatosa	\$500	\$1,000	\$1,000	\$1,000
City of West Bend	\$0	\$0	\$0	\$0
City of XYZ	\$0	\$0	\$0	\$0
Percent of Respondents that Fund an Employer H.S.A. or H.R.A. contribution:	50%	43%	29%	42%
Market Average of the Organizations that make an H.S.A. Contribution :	\$545	\$1,367	\$1,250	\$964
XYZ as % of Mkt Avg:	0%	0%	0%	0%

Data Effective Date: 4/4/2025

Notes: Since XYZ does not currently offer an HDHP plan, this information is for "FYI" purposes. 42% of peers with Employee Only coverage offer an Health Savings Account or Health Reimbursement Account contribution. In the case of employers with Family coverage, 42% of employers offer such a contribution. While not yet a "predominant practice" there is a sizeable number of peers who do make a contribution. Amounts vary overall and even with tiers of coverage.

According to the Kaiser Family Foundation "Employer Health Benefit Survey (2024)", the average employer contribution to an H.S.A. Plan for Employee Only coverage is \$705 and \$1,297 for Family coverage.

Table 19. Prescription Drug Coverage

20. If the medical plans listed above do not include prescription drug coverage, please provide the following on the MOST POPULATED Prescription Drug Plan:

Employee Only Coverage:									
Peer	NOT a separate plan	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Co-Pay (\$)	Annual Deductible (\$)
City of Appleton	X								
City of Beloit	X								
City of Eau Claire									
City of Green Bay									
City of Janesville	X								
City of Kenosha		Navatis				100%	0%	varies	
City of Manitowoc	X								
City of Oshkosh		CVS/Caremark							
City of Sheboygan	X								
City of Wausau									
City of Wauwatosa	X								
City of West Bend	X								
City of XYZ	X								
Market Average:	7								
XYZ as % of Mkt Avg:									

Data Effective Date: 4/9/2025

Notes:
Only two peers offer prescription drug coverage as a plan separate from the Health Care coverage plan. XYZ does not have a separate plan for prescription drugs.

Employee + Family Coverage:									
Peer	NOT a separate plan	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Co-Pay (\$)	Annual Deductible (\$)
City of Appleton	X								
City of Beloit	X								
City of Eau Claire									
City of Green Bay									
City of Janesville	X								
City of Kenosha		Navatis				100%	0%	varies	
City of Manitowoc	X								
City of Oshkosh		CVS/Caremark							
City of Sheboygan	X								
City of Wausau									
City of Wauwatosa	X								
City of West Bend	X								
City of XYZ	X								
Market Average:	7								
XYZ as % of Mkt Avg:									

Data Effective Date: 4/9/2025

Footnotes:

Notes:

Table 20. Dental Coverage

21. If the medical plans listed above do not include dental coverage, please provide the following on the MOST POPULATED Dental Plan:

Employee Only Coverage:								
Peer	NOT a separate plan	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Annual Benefit per Covered Member (\$)
City of Appleton		Delta Dental	\$102.66	\$10.00	\$112.66	91%	9%	\$1,500
City of Beloit		Delta Dental	\$54.79	\$6.09	\$60.88	90%	10%	\$1,500
City of Eau Claire		Delta Dental						
City of Green Bay		Delta Dental	\$38.48	\$5.45	\$43.93	88%	12%	\$2,500
City of Janesville			\$21.40	\$3.48	\$24.88	86%	14%	\$1,500
City of Kenosha		Care Plus				100%	0%	\$1,900
City of Manitowoc		Delta Dental	\$14.08	\$42.53	\$56.61	25%	75%	\$1,500
City of Oshkosh		Delta Dental	\$50.00	\$50.00	\$100.00	50%	50%	\$1,500
City of Sheboygan		Delta Dental	\$42.70	\$7.54	\$50.24	85%	15%	\$1,500
City of Wausau		Delta Dental	\$20.40	\$20.38	\$40.78	50%	50%	\$1,500
City of Wauwatosa		Humana or Care Plus	\$28.70	\$12.30	\$41.00	70%	30%	\$2,000
City of West Bend		Delta Dental	\$0.00	\$37.84	\$37.84	0%	100%	\$1,000
City of XYZ			\$0.00	39.84 / 47.84	39.84 / 47.84	0%	100%	750 / 1000
Market Average:			\$37.32	\$19.56	\$56.88	67%	33%	\$1,627.27
XYZ as % of Mkt Avg:			0%			0%	301%	

Data Effective Date: 4/9/2025

Footnotes:

Notes:
The lack of an employer contribution to dental insurance is not consistent with the prevalent market practice, namely that all but one peer with Dental Coverage provide some contribution to the premium. The average Employer Contribution is 67% and the average Employee Contribution is 33%. The Total Monthly Premium at the City of XYZ is below the average in the peer market for both the Low and High Plans. The Maximum Annual Benefit per Covered Member (\$) is considerably lower than the market average in the case of both plans.

Employee + Family Coverage:								
Peer	NOT a separate plan	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Annual Benefit per Covered Member (\$)
City of Appleton		Delta Dental	\$261.53	\$20.00	\$281.53	93%	7%	\$1,500
City of Beloit		Delta Dental	\$114.15	\$12.68	\$126.83	90%	10%	\$1,500
City of Eau Claire		Delta Dental	\$0.00	\$82.15	\$82.15	0%	100%	\$1,200
City of Green Bay		Delta Dental	\$116.86	\$16.66	\$133.52	88%	12%	\$2,500
City of Janesville			\$77.96	\$11.26	\$89.22	87%	13%	\$1,500
City of Kenosha		Care Plus				100%	0%	\$1,900
City of Manitowoc		Delta Dental	\$32.52	\$119.70	\$152.22	21%	79%	\$1,500
City of Oshkosh		Delta Dental	\$150.00	\$150.00	\$300.00	50%	50%	\$1,500
City of Sheboygan		Delta Dental	\$141.48	\$24.96	\$166.44	85%	15%	\$1,500
City of Wausau		Delta Dental	\$65.44	\$65.44	\$130.88	50%	50%	\$1,500
City of Wauwatosa		Humana or Care Plus	\$106.18	\$45.51	\$151.69	70%	30%	\$2,000
City of West Bend		Delta Dental	\$0.00	\$132.22	\$132.22	0%	100%	\$1,000
City of XYZ		Delta Dental	\$0.00	142.74/177.74	142.74/177.74	0%	100%	750/1000
Market Average:	0		\$96.92	\$61.87	\$158.79	61%	39%	\$1,591.67
XYZ as % of Mkt Avg:			0%			0%	258%	

Data Effective Date: 4/9/2025

Footnotes:

Notes:

The average Employer Contribution for Family Coverage is 61% and the average Employee Contribution is 39%. The Total Monthly Premium at the City of XYZ is below the average in the peer market in the Low Plan and above market in the case of the High plan. The Maximum Annual Benefit per Covered Member (\$) is considerably lower than the market average in the case of both plans.

Table 21. Vision Coverage

22. If the medical plans listed above do not include vision coverage, please provide the following on the MOST POPULATED Vision Plan:

Employee Only Coverage:							
Peer	NOT a separate plan	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)
City of Appleton		Delta Vision	\$8.04	\$4.02	\$12.06	67%	33%
City of Beloit		Delta Vision	\$0.00	\$6.51	\$6.51	0%	100%
City of Eau Claire		Delta Vision					
City of Green Bay		Superior Vision	\$0.00	\$7.90	\$7.90	0%	100%
City of Janesville			\$6.46	\$0.00	\$6.46	100%	0%
City of Kenosha		UHC		\$8.99	\$8.99	0%	100%
City of Manitowoc		NVA	\$0.00	\$6.80	\$6.80	0%	100%
City of Oshkosh		Delta Vision	\$5.83		\$5.83	100%	0%
City of Sheboygan		NVA	\$0.00	\$9.14	\$9.14	0%	100%
City of Wausau		NVA	\$4.89		\$4.89	100%	0%
City of Wauwatosa		Superior Vision	\$3.94	\$0.69	\$4.63	85%	15%
City of West Bend		Delta Vision	\$0.00	\$5.88	\$5.88	0%	100%
City of XYZ			\$6.24	\$0.00	\$6.24	100%	0%
Market Average:			\$2.92	\$5.55	\$7.19	41%	59%
XYZ as % of Mkt Avg:			214%	0%	87%	243%	0%

Data Effective Date: 4/9/2025

Footnotes: City of Sheboygan - Amount is for full plan; materials only is 6.10 pd 100 % by employee

Notes:

The employer contribution to Vision for Employee Only coverage is significantly above market and the fact the employee makes no contribution is another indication Fond Du Lac's benefit in this area is "above market".

Employee + Family Coverage:							
Peer	NOT a separate plan	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)
City of Appleton		Delta Vision	\$20.00	\$10.00	\$30.00	67%	33%
City of Beloit		Delta Vision	\$0.00	\$16.19	\$16.19	0%	100%
City of Eau Claire		Delta Vision	\$0.00	\$21.81	\$21.81	0%	100%
City of Green Bay		Superior Vision	\$0.00	\$20.96	\$20.96	0%	100%
City of Janesville			\$6.46	\$9.69	\$16.15	40%	60%
City of Kenosha		UHC		\$27.52	\$27.52	0%	100%
City of Manitowoc		NVA	\$0.00	\$17.68	\$17.68	0%	100%
City of Oshkosh		Delta Vision	\$17.41		\$17.41	100%	0%
City of Sheboygan		NVA	\$0.00	\$24.22	\$24.22	0%	100%
City of Wausau		NVA	\$14.85	\$0.00	\$14.85	100%	0%
City of Wauwatosa		Superior Vision	\$13.74	\$2.42	\$16.16	85%	15%
City of West Bend		Delta Vision	\$0.00	\$17.88	\$17.88	0%	100%
City of XYZ			\$18.98	\$0.00	\$18.98	100%	0%
Market Average:			\$6.59	\$15.31	\$20.07	33%	67%
XYZ as % of Mkt Avg:			288%	0%	95%	306%	0%

Data Effective Date: 4/9/2025

Footnotes: City of Sheboygan - Amount is for full plan; materials only is 16.18 pd 100 % by employee

Notes:

Like the Employee Only coverage tier, the employer contribution to Vision for Family coverage is significantly above market and the fact the employee makes no contribution is another indication Fond Du Lac's benefit in this area is "above market".

Table 22: Plan Differences for Employee Groups

23. If medical, prescription, dental and vision benefits differ for employee groups, please identify those differences:

Peer	Response
City of Appleton	None
City of Beloit	None
City of Eau Claire	None
City of Green Bay	None
City of Janesville	None
City of Kenosha	None
City of Manitowoc	None
City of Oshkosh	None
City of Sheboygan	None
City of Wausau	None
City of Wauwatosa	Premiums vary by bargaining group, and full time vs part time
City of West Bend	None
City of XYZ	N/A

Data Effective Date: 4/9/2025

Footnotes:

Notes: Other than Wauwatosa, medical, prescription, dental and vision benefits do not differ between employee groups at any of the peer locations. This is also true at the City of XYZ.

Table 23. Short-Term Disability

24. Does your organization provide Short-Term Disability Insurance? If "Yes," please provide the following information:

Peer	Offered?	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Number of Weeks of Coverage
City of Appleton	No						
City of Beloit	No						
City of Eau Claire	No						
City of Green Bay	No						
City of Janesville	Yes	\$0.00	Varies based on salary & elected elimination period		0%	100%	24
City of Kenosha	No						
City of Manitowoc	Yes				0%	100%	11
City of Oshkosh	No but City offers Income Continuation Insurance for short and long term disabilities						
City of Sheboygan	Yes				0%	100%	4
City of Wausau	No						
City of Wauwatosa	No						
City of West Bend	Yes				0%	100%	
City of XYZ	Yes	\$0.00	Age based		0%	100%	13
Number of "Yes" Responses/Averages:	4	\$0.00			0%	100%	13
XYZ as % of Mkt Avg:						100%	100%

Data Effective Date: 4/9/2025

Footnotes:

Notes:
Forty-two percent (42%) of peers offer short-term disability coverage. The City of XYZ is "above market" in this regard. Like the City of XYZ, in the case of the four cities that provide short-term disability insurance, the employees pay 100% of the premium and the employer is not making a contribution to the premium. In that regard the City's plan is competitive with cities providing this type of insurance. There is substantial variance in the Maximum Benefit Period practice among the cities offering short-term disability insurance, ranging from 4 weeks to 24 weeks. The City's Maximum Benefit Period is consistent with the average of the four peers.

Table 24. Long-Term Disability

25. Does your organization provide Long-Term Disability Insurance? If "Yes," please provide the following information:

Peer	Offered?	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Number of Weeks of Coverage
City of Appleton	Yes	\$10.05	\$0.00	\$10.05	100%	0%	260
City of Beloit	No						
City of Eau Claire	Yes	Premium prorated on wage	Premium prorated on wage		50%	50%	Not provided
City of Green Bay	Yes	Varies by Age & Salary	Varies by Age & Salary				104
City of Janesville	Yes	\$0.00	Varies by age, salary & elected elimination period		0%	100%	
City of Kenosha	No						
City of Manitowoc	Yes				0%	100%	up to age 65
City of Oshkosh	No but City offers Income Continuation Insurance for short and long term disabilities						
City of Sheboygan	No						
City of Wausau	Yes	\$0.00	Varies		0%	100%	104
City of Wauwatosa	No						
City of West Bend	Yes				0%	100%	Not provided
City of XYZ	Yes	\$0.00	Age Based		0%	100%	social security normal retirement age
Number of "Yes" Responses/Averages:	7	\$3.35	\$0.00	\$3.35	25%	75%	156
XYZ as % of Mkt Avg:		0%			0%	133%	

Data Effective Date: 4/9/2025

Footnotes: City of Appleton - entered "10.05/life"; removed "life" from entry so formula would work

City of Green Bay - provided link to benefits guide LTD on pg. 29 <https://www.greenbaywi.gov/DocumentCenter/View/7681/2025-City-of-Green-Bay-Benefits-Booklet-PDF>

Notes:

Sixty-seven percent (67%) of peers offer long-term disability coverage. The City of XYZ also offers this insurance and is competitive with the market in this regard. Of the cities that offer this insurance, there is a mix of EMPLOYER contribution percentages. The City of Fond du Lac's 0% premium contribution is consistent with the majority of cities that offer long-term disability coverage. In the case of cities that responded to this sub-question, there is a mix of practices for maximum benefit period. Specifically for those with a number of weeks limit the average number of weeks is 156. Some of the peers provide benefits through normal retirement age (as defined by Social Security Administration). The City of XYZ is one such peer. The City's benefit provisions in the area of long-term disability insurance are competitive overall.

Table 25. Basic Life Insurance

26. Does your organization provide Basic Life Insurance? If "Yes," please provide the following information:

Peer	Offered?	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Benefit Amount
City of Appleton	Yes	\$3.55	\$0.00	\$3.55	100%	0%	1x annual salary rounded to next even thousand up to a max of \$50,000
City of Beloit	Yes				100%	0%	1x annual salary
City of Eau Claire	Yes	\$0.00	Based on wage				Basic, Supp, Addl, Spouse & Dep available
City of Green Bay	Yes	Varies based on age	\$0.00		100%	0%	1x salary rounded up to next \$1,000, up to a maximum of \$100,000
City of Janesville	Yes	Varies based on age & annual earnings	\$0.00		100%	0%	1x salary rounded up to next \$1,000
City of Kenosha	Yes	1 x annual salary	varies				1x annual salary
City of Manitowoc	Yes	11 months premium	1 month premium		92%	8%	1x annual salary
City of Oshkosh	Yes	\$0.00	\$2.88	\$2.88	0%	100%	Based Units: 10,000/person and an additional \$5000/dependent child
City of Sheboygan	Yes				100%	0%	1x annual salary
City of Wausau	Yes	\$0.00	Varies		0%	100%	
City of Wauwatosa	Yes		\$0.00		100%	0%	1x salary rounded up to next \$1,000
City of West Bend	Yes	Varies by age & wage			100%	0%	2x annual salary
City of XYZ	Yes	Varies by salary/age	\$0.00	Not reported	100%	0%	1x - NE; 1.5x Exempt
Number of "Yes" responses/averages:	12	\$0.89	\$0.58	\$3.22	79%	21%	
XYZ as % of Mkt Avg:			0%		126%	0%	

Data Effective Date: 4/9/2025

Footnotes: City of Appleton - entered "3.55/life"; removed "/life" from entry so formula would work;

City of Beloit - did not provide amounts, only percentages;

City of Green Bay - provided link to benefits guide Life Ins on pg. 28 <https://www.greenbaywi.gov/DocumentCenter/View/7681/2025-City-of-Green-Bay-Benefits-Booklet-PDF>

Notes:

All employers provide Basic Life Insurance. Because the average Employer contribution is 79% and the City of XYZ pays 100% of the premium, the City's benefit is "above market" in this regard. The City's benefit amount of 1x for non-exempt and 1.5x for exempt is competitive with the market where the prevalent practice is 1x salary. Additional life insurance for exempt staff is one way the City can recognize "extra" hours worked by exempt that is not directly compensated.

Table 26. Defined Contribution Plan

27. Please provide the following information regarding your Defined Contribution retirement plan, including the contribution rate for both the employer and the employee. If the employer contribution is a "match," indicate the maximum or limit on the match.

Check if you do **not** offer a Defined Contribution Plan.

If you do offer a Defined Contribution Plan, please provide the following:

Peer	NOT Offered	Plan Name	Contribution Rate Made by the Employer		Maximum Employer Match of Employee Contributions		Required Employee Contribution		Voluntary Employee Contribution Maximum	
			Percent of Pay	Dollar Amount	Percent of Pay	Dollar Amount	Percent of Pay	Dollar Amount	Percent of Pay	Dollar Amount
City of Appleton		Wisconsin Retirement System	6.95%		N/A		6.95%		N/A	
City of Beloit	X									
City of Eau Claire		MissionSquare		\$0.00		\$0.00		\$0.00		\$23,500
City of Green Bay		Wisconsin Retirement System	6.95%				6.95%			
City of Janesville	X									
City of Kenosha	X									
City of Manitowoc		WI Retirement System	6.95%				6.95%			
City of Oshkosh										
City of Sheboygan	X									
City of Wausau		Varies per WRS requirements for each category								
City of Wauwatosa	X									
City of West Bend	X									
City of XYZ	X									
Number of "Offered" Responses/Market Averages:	6		6.95%	\$0.00		\$0.00	6.95%	\$0.00		\$23,500

Data Effective Date: 4/9/2025

Footnotes: City of Eau Claire - entered "Set by IRS" in Voluntary Contribution column; I entered 2025 max allowable

City of Green Bay - provided copy of benefits guide; Retirement on page 35 <https://www.greenbaywi.gov/DocumentCenter/View/7681/2025-City-of-Green-Bay-Benefits-Booklet-PDF>; entered what I understood from that document.

Notes:

Because 50% of the peers do offer a Defined Contribution plan, the City's lack of a plan is neither above or below the prevalent practice. Among the three peers that provided the Employer Contribution to the Defined Contribution Plan, all are offered through the Wisconsin Retirement System and all require a 6.95%(of base salary) Employer Contribution. In all three of these cases the employees are also required to make a 6.95% (of base salary) contribution.

Table 27. Deferred Compensation Plans/457 Plans

28. Please provide the following information regarding your Deferred Compensation/457 retirement plan, including the contribution rate for both the employer and the employee. If the employer contribution is a "match," indicate the maximum or limit on the match.

Check if you do not offer a Defined Contribution Plan.

If you do offer a Deferred Compensation/457 Plan, please provide the following:

Peer	NOT Offered	Plan Name	<u>Contribution Rate Made by the Employer</u>		<u>Maximum Employer Match of Employee Contributions</u>		<u>Required Employee Contribution</u>		<u>Voluntary Employee Contribution Maximum</u>	
			Percent of Pay	Dollar Amount	Percent of Pay	Dollar Amount	Percent of Pay	Dollar Amount	Percent of Pay	Dollar Amount
City of Appleton		Voya Financial	0%		N/A		No Minimum			\$23,500
City of Beloit		Nationwide	0%	N/A	N/A	\$0.00	No Minimum			\$23,500
City of Eau Claire		MissionSquare and WDC		\$0.00		\$0.00	No Minimum			\$23,500
City of Green Bay		MissionSquare and WDC								\$23,500
City of Janesville	X									
City of Kenosha			0%		N/A		No Minimum			\$23,500
City of Manitowoc			0%		N/A		No Minimum		100%	
City of Oshkosh		MissionSquare	0%		N/A	\$0.00	No Minimum			\$23,500
City of Sheboygan		WDC, Nationwide, MissionSquare	0%		N/A					
City of Wausau		Wisconsin Deferred and Nationwide	0%		N/A		No Minimum		0%	
City of Wauwatosa		MissionSquare, Nationwide, and North Shore Bank	0%		N/A		No Minimum			
City of West Bend		WDC	0%	\$0.00	N/A	\$0.00			Max allowable	\$23,500
City of XYZ		Mission Square	0%		0%		Voluntary		N/A	
Number of "Offered" Responses/Market Trends	11		0%	\$0.00	Not Applicable to any respondent	\$0.00	No Plan has an established Minimum Employee Contribution		50%	\$23,500

Data Effective Date: 4/9/2025

Footnotes: City of Appleton, City of Beloit, City of Eau Claire - entered "IRS Max" in Voluntary Contribution column; I entered 2025 maximum allowable

City of Green Bay - provided copy of benefits guide; Retirement on page 35 <https://www.greenbaywi.gov/DocumentCenter/View/7681/2025-City-of-Green-Bay-Benefits-Booklet-PDF>; entered what I understood from that document.

Notes:

All but one peer as well as the City of XYZ provide a Deferred Compensation Plan or 457 Plan, specifically. None of the employers, including the City of XYZ make an Employer contribution. None of the plans require an employee contribution - these are strictly voluntary contribution plans. The maximum contribution amount is based on the IRS maximum. The fact that the City of XYZ offers a plan with key provisions matching the prevalent market practice means that the City's benefit is competitive.

Table 28 A-C. Vacation, Sick Time, Personal Days
29A. Please indicate the number of accrued days per year for vacation days, for the following years of service.

Paid Vacation Days:	Years of Service			Years of Service			Years of Service			Years of Service			Years of Service			Years of Service			Years of Service			Years of Service			Years of Service		
Peer	<1 Year	1 Year	2 Years	3 Years	4 Years	5 Years	6 Years	7 Years	8 Years	9 Years	10 Years	11 Years	12 Years	13 Years	14 Years	15 Years	16 Years	17 Years	18 Years	19 Years	20 Years	21 Years	22 Years	23 Years	24 Years	25 Years	More than 25 Years
City of Appleton	5.0	5 - NE 10 - E	10 - NE 10 - E	10 - NE 10 - E	10 - NE 10 - E	10 - NE 15 - E	12 - NE 15 - E	12 - NE 15 - E	15 - NE 18 - E	15 - NE 18 - E	15 - NE 18 - E	15 - NE 18 - E	20 - NE 22 - E	20 - NE 22 - E	20 - NE 22 - E	22.0	22.0	22.0	22.0	22.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0
City of Beloit	0	11	11	13	13	15	15	15	15	18	18	18	18	20	20	20	20	20	20	20	22	25	25	25	25	25	25
City of Eau Claire	15	15	15	15	15	17	17	17	20	20	20	20	20	22	22	22	22	25	25	25	25	25	25	25	25	25	25
City of Green Bay	10	10	10	10	10	10	15	15	15	15	15	17	17	17	17	17	20	20	20	20	20	25	25	25	25	25	25
City of Janesville	1.25 days/full month worked	15	15	15	15	15	16	17	18	19	20	21	22	23	24	25	25	25	25	25	25	25	25	25	25	25	25
City of Kenosha	12	15	15	15	15	15	17	17	17	17	17	19	19	19	19	19	21	21	21	21	21	25	25	25	25	25	25
City of Manitowoc	8	15	15	15	17	17	20	20	20	21	22	23	24	25	25	25	25	25	30	30	30	30	30	30	30	30	30
City of Oshkosh	10 (prorated)	10	10	10	10	15	15	15	15	15	20	20	20	20	20	20	20	20	25	25	25	25	25	25	25	25	28
City of Sheboygan	10 (prorated)	20	20	20	20	25	25	25	25	25	25	25	25	30	30	30	30	30	30	30	30	35	35	35	35	35	35
City of Wausau	15	15	15	15	15	20	20	20	20	20	25	25	25	25	25	30	30	30	30	30	30	30	30	30	30	30	30
City of Wauswotse	15 (prorated)	15	15	15	15	20	20	20	20	20	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25	25
City of West Bend	Uses a Paid time off program																										
City of XYZ	10.0	10.0	10.0	10.0	10.0	10 - NE 15 - E	10 - NE 15 - E	10 - NE 15 - E	15	15	15	15	15	15	20	20	20	20	20	20	25	25	25	25	25	25	25
Market Average:	9.3	13.7	13.7	13.9	14.1	16.9	17.7	18.1	18.2	18.6	20.6	21.2	21.4	22.3	22.5	22.9	23.3	23.9	24.4	24.8	25.3	26.8	26.8	26.8	26.8	26.8	27.1
XYZ Days vs Market Average:	0.7	-3.7	-3.7	-3.9	-4.1	-6.5 for NE and -1.9 for E	-7.8 for NE and 2.6 for E	-7.5 for NE and 2.9 for E	-3.2	-3.6	-5.6	-6.2	-6.4	-7.3	-2.5	-2.9	-3.3	-3.9	-4.4	-4.8	-0.3	-1.8	-1.8	-1.8	-1.8	-1.8	-2.1

Data Effective Date: 4/9/2025

Footnotes: City of Appleton - Starting at 21 years listed only 5 days for NE; changed to 25 based on amounts for previous years;
City of Eau Claire - gave hours instead of days; divided amounts by 8 to calculate # of days
City of Kenosha - see email for these numbers; Union employees' Time Off governed by CBA
City of Sheboygan - gave hours instead of days; divided amounts by 8 to calculate # of days
City of West Bend - PTO - all hours entered in "Personal Days" column
City of XYZ - Used wks, I converted to days based on a 5 day workweek

Notes:
The number of paid vacation days at the City of XYZ is below the market average for every "year of service" category, at different degrees depending on the "year of service" category under analysis. In several categories the City's benefit level is several days below market, particularly for Non-Exempt employees with 6, 7 and 8 years of service. In general, the number of vacation days jumps from two weeks to three earlier at most peers than the five years (Exempt) and 8 years (Non-Exempt) that are required at the City of XYZ. The number of vacations does vary in numbers and the timing for the increase in the number of days quite a bit between cities, but in any case, Fond du Lac's benefit in this area is not competitive. We also note that the existence of different benefit levels for Exempt and Non-Exempt staff is only true at one peer organization, therefore the City's practice is not consistent with the prevalent market practice in this area.

29B. Please indicate the number of accrued days per year for sick days, for the following years of service.

Paid Sick Days	Years of Service				Years of Service				Years of Service				Years of Service				Years of Service				Years of Service				Years of Service				Years of Service			
Peer	<1 Year	1 Year	2 Years	3 Years	4 Years	5 Years	6 Years	7 Years	8 Years	9 Years	10 Years	11 Years	12 Years	13 Years	14 Years	15 Years	16 Years	17 Years	18 Years	19 Years	20 Years	21 Years	22 Years	23 Years	24 Years	25 Years	More than 25 Years					
City of Appleton	N/A - covered under Personal Days Policy	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A					
City of Beloit	12 (prorated based on hire date)	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12					
City of Eau Claire	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12					
City of Green Bay	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12					
City of Janesville	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12					
City of Kenosha																																
City of Manitowoc		10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10					
City of Oshkosh	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67	8.67					
City of Sheboygan																																
City of Wausau	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12					
City of Wauwatosa	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12					
City of West Bend	Uses a Paid time off program																															
City of XYZ	based on # of months of service in first year of hire	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12	12					
Market Average:	11.4	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3	11.3					
XYZ Days vs Market Average:		1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1					

Data Effective Date: 4/9/2025

Footnotes: City of Beloit - 8 hrs/month; calculated to 12 days/yr;
City of Green Bay - 1/mo; calculated to 12 days/yr;
City of Oshkosh - 1 sick day/30 days worked; calculated based on 5 day workweek
City of West Bend - PTO - all hours entered in "Personal Days" column

Notes:
The number of paid sick days at the City of XYZ is slightly above the market average for every "year of service" category. However, the prevalent practice among the peers is 12 days a year, an amount which is also the case to the City of XYZ. In any case, the City's benefit is competitive in this area.

29C. Please indicate the number of accrued days per year for personal days, for the following years of service.

Personal Days	Years of Service				Years of Service			Years of Service			Years of Service			Years of Service			Years of Service			Years of Service			Years of Service			Years of Service		
Peer	<1 Year	1 Year	2 Years	3 Years	4 Years	5 Years	6 Years	7 Years	8 Years	9 Years	10 Years	11 Years	12 Years	13 Years	14 Years	15 Years	16 Years	17 Years	18 Years	19 Years	20 Years	21 Years	22 Years	23 Years	24 Years	25 Years	More than 25 Years	
City of Appleton	Prorated based on hire date	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	
City of Beloit	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	
City of Eau Claire	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
City of Green Bay	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	
City of Janesville	0	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	.5 - 3.5	
City of Kenosha	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
City of Manitowoc	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
City of Oshkosh	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
City of Sheboygan	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
City of Wausau	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	
City of Wauwatosa	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
City of West Bend	Uses a Paid time off program																											
City of XYZ	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Most Prevalent Response (Non-Zero Responses):	3.0	3.0	3.8	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	
XYZ Days vs Market Average:	-3.0	-3.0	-3.8	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	-3.0	

Data Effective Date: 4/9/2025

Footnotes: City of Beloit - <1 year is prorated based on hire date

Notes:
Thirty-three percent (33%) of the City's peers have a personal days benefit in addition to paid vacation and sick leaves. Therefore the City's lack of personal days benefit is consistent with the prevalent market practice. Where the benefit does exist, the most reported benefit level is three days per year. Appleton does not have a sick leave program per se, but instead has a personal days plan to cover sick leave, funeral leave and "floating holidays".

Table 29: Time Off Accrual

30. When are vacation, sick and personal days accrued?

Peer	Response
City of Appleton	Annually
City of Beloit	Vacation and Personal - Annually; Sick- 1 day monthly
City of Eau Claire	Not reported
City of Green Bay	Biweekly
City of Janesville	Annually
City of Kenosha	Not reported
City of Manitowoc	Biweekly
City of Oshkosh	Sick accrued monthly; Vacation accrued annually
City of Sheboygan	PTO is granted Jan. 1st of each year based on length of service they will reach that year.
City of Wausau	Sick/vacation bi-weekly; personal annually
City of Wauwatosa	Vacation time is awarded up-front and not accrued. Sick time is accrued per month
City of West Bend	Bi-weekly
City of XYZ	Annually

Data Effective Date: 4/9/2025

Footnotes:

Notes:

There is a variety of practices in this regard. Annual accrual of vacation, sick and personal days, a practice in effect at the City of XYZ, is also used at several peer cities.

Table 30. Designated Paid Holidays

30. Please indicate which holidays are observed by your organization by choosing "Yes" or No" for each.

	New Year's Day	MLK Birthday	President's Day	Good Friday	Memorial Day	Juneteenth	Independence Day	Labor Day	Indigenous Peoples/Columbus Day	Election Day	Veterans Day	Thanksgiving Day	Day After Thanksgiving	Christmas Eve	Christmas Day	New Year's Eve	Total
Peer	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	
City of Appleton	Yes	No	No	No	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	No	8
City of Beloit	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	No	10
City of Eau Claire	Yes	No	No	No	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	No	8
City of Green Bay	Yes	Yes	No	No	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	10
City of Janesville	Yes	No	No	No	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	No	8
City of Kenosha	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	12
City of Manitowoc	Yes	No	No	No	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	9
City of Oshkosh	Yes	No	No	Yes	Yes	No	Yes	Yes	No	No	No	Yes	No	Yes	Yes	Yes	9
City of Sheboygan	Yes	No	No	Yes	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	10
City of Wausau	Yes	No	No	Yes	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	10
City of Wauwatosa	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	12
City of West Bend	Yes	No	No	Yes	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	10
City of XYZ	Yes	No	No	No	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	9
Number of "Yes" Responses	12	4	0	7	12	2	12	12	0	0	0	12	11	12	12	8	10
Number of "No" Responses	0	8	12	5	0	10	0	0	12	12	12	0	1	0	0	4	
XYZ Practice is <u>NOT</u> Consistent with Prevalent Market Practice:	X																

Data Effective Date: 4/9/2025

Footnotes: City of Eau Claire, City of Janesville & City of West Bend - I entered No for blank responses

Notes: The named holidays observed by the City of XYZ are in line with the market in each case except for Good Friday where more than half of the peers offer this day as a holiday and the City of XYZ does not. In our experience, the public sector is slowly moving toward stopping the addition of named holidays and instead adding a small number of personal days or "floating holidays", to provide employees more choice in time off to meet their individual needs and preferences.

Table 31. Number of Floating Holidays

32. How many floating holidays do employees receive each year (in addition to paid holidays, vacation, and sick leave; please include any additional days around Christmas Eve or Christmas Day in this number)?

Peer	Number of Floating Holidays
City of Appleton	4
City of Beloit	3
City of Eau Claire	3
City of Green Bay	0
City of Janesville	3
City of Kenosha	2
City of Manitowoc	0
City of Oshkosh	4
City of Sheboygan	0
City of Wausau	0
City of Wauwatosa	2
City of West Bend	0
XYZ	5
Market Average:	1.8
XYZ vs. Market Average:	3.3

Data Effective Date: 4/9/2025

Footnotes: City of Beloit - Counted these as "Personal Days" in #29;
City of Kenosha - Union employee amount governed by CBA
City of West Bend - included in PTO

Notes: The number of floating holidays at the City of XYZ is significantly above the market average as well as the most reported response of three (3) days). To fully understand market time off practices, it is important to review the responses for both Personal Days and Floating Holidays, which essentially amount to the same kind of benefit.

Table 32. Other Benefits

33. Please choose any of the following benefits your organization offers to employees. Choose all that apply.

Peer	Retiree Health Insurance	Tuition Reimbursement	Paid Parental Leave	Paid Caregiver Leave	Service Level Benefit (Longevity Pay)	Employee Assistance Program	Remote Work Policy	Flexible Scheduling	Sabbatical Leave	Catastrophic Leave/Leave Donation
City of Appleton	X	X				X	X	X		
City of Beloit		X			X	X		X		
City of Eau Claire		X				X	X	X		X
City of Green Bay	X					X	X	X		X
City of Janesville	X					X	X	X		X
City of Kenosha	X	X				X				
City of Manitowoc	X	X				X		X		X
City of Oshkosh	X	X			X	X	X			
City of Sheboygan	X	X				X	X	X		
City of Wausau		X				X				X
City of Wauwatosa		X	X			X	X	X		
City of West Bend	X	X				X		X		
City of XYZ	X	X	X			X	X	X		X
Number of "Yes" Responses	8	10	1	0	2	12	7	9	0	5
Number of "No" Responses	4	2	11	12	10	0	5	3	12	7
XYZ Practice NOT Consistent with Prevalent Market Practice:			X							X

Data Effective Date: 4/9/2025

Notes:
There are no benefit areas where the City of Fond Du Lac's program or lack of a program is INCONSISTENT with the prevalent market practice. There is one benefit program offered at the City of XYZ that are not offered at the majority of peers. The Leave Donation Program at the City of XYZ is only offered at forty-two percent (42%) of the peer organizations.

Table 33. CDL Training Pay

34. Does your organization pay for CDL training? If yes, does your organization have a policy or clause regarding employees reimbursing your organization at a pro-rated rate upon separation?

Peer	<u>Pay for CDL Training</u>		<u>Employee Reimbursement Upon Separation</u>	
	Yes	No	Yes	No
City of Appleton	X			X
City of Beloit	X		X	
City of Eau Claire	X			X
City of Green Bay	X			X
City of Janesville	X			X
City of Kenosha	X			X
City of Manitowoc	X		X	
City of Oshkosh	X		X	
City of Sheboygan	X		X	
City of Wausau	X		X	
City of Wauwatosa	X			X
City of West Bend	X		X	
Number:	12	0	6	6
City of XYZ	X		X	

Data Effective Date: 4/9/2025

Notes: All peers and the City of XYZ pay for CDL training-related expenditures. Since one half of the peers require pro-rated reimbursement to the City for the training upon voluntary separation and the other half do not, the City's policy of requiring pro-rated reimbursement is neither above or below the prevalent market practice.

Table 34. Wellness Benefits

35. Please describe any benefits that are meant to support employee wellness activities.

Peer	Response
City of Appleton	City health care clinic (Connecting Care Clinic) including physical therapy and health coaching
City of Beloit	Employee Assistance Program, various confidential programs through our medical insurance- JointStrong, Inespera Health
City of Eau Claire	Employees have ability to earn a \$500 deductible on health insurance by participating in wellness program
City of Green Bay	
City of Janesville	Wellness portal with opportunity to complete challenges, earn points, and cash in for gift cards at end of the year
City of Kenosha	N/A
City of Manitowoc	wellness membership reimbursements, onsite fitness center, near site medical clinic
City of Oshkosh	Discounts at gyms, Group Challenges (Holistic Hero, Balance Boost etc.), Employee made Cookbook yearly update, Currently doing a spring reading challenge, Lunch N Learns (some in person, some virtual), Monthly Newsletter talking about wellness in the organization and the City.
City of Sheboygan	fitness reimbursement (up to \$50/month)
City of Wausau	On-site fitness centers, Bublr bike discount, wellness reimbursement program for gym membership and race participation, wellness portal, on-site instructor led classes, general promotion of wellbeing in the workplace.
City of Wauwatosa	
City of West Bend	wellness team that puts together multiple events and activities through the year
City of XYZ	Engagement activities

Data Effective Date: 4/9/2025

Notes:

There are clearly a variety of programs and initiative in this area, a finding consistent among our multiple surveys conducted each year. Perhaps some of these ideas will be of interest to the City of XYZ.

Table 35. Unique Benefits

36. Please describe any unique benefits offered by your organization that employees particularly enjoy:

Peer	Response
City of Appleton	
City of Beloit	
City of Eau Claire	
City of Green Bay	employee resource groups, retirement planner consultations, group exercise classes, onsite health coaching, resilience and mental health lunch and learns, onsite fitness center, reimbursement for required licenses (plumber, electrician), Clothing & Shoe Allowance
City of Janesville	Vacation buy program - employees not at the max vacation of 25 days can buy up to 5 days of vacation and spread out over all 26 pay periods in the year
City of Kenosha	N/A
City of Manitowoc	flexible work schedule, day off for birthday, holiday and summer employee appreciation events
City of Oshkosh	Reading challenge with prizes, City Employee Cookbook, gym discounts
City of Sheboygan	opt out insurance - can receive \$100/month they are not enrolled in the City's health insurance
City of Wausau	
City of Wauwatosa	Paid volunteer time, wellness book club
City of West Bend	N/A
City of XYZ	In its health care program, the City: 1. Provides access to the Corporate Care Clinic located in XYZ and covers 100% of costs for nine types of visits/services 2. Provides access to Teledoc, which is an online medical service, at no cost to employees 3. More recently has begun using Garner, a service which helps employees choose highly-rated doctors. If the employee chooses one of the doctors recommended on the Garner app, the employee is reimbursed for up to \$2,000 single, \$4,000 family, for co-pays and deductibles, including prescriptions that the rated doctor issues 4. Provides free access to ATI physical therapy for employees, with no referral required, for up to 25 visits The City also pays for the license or certification for employees where they are required for the job, as well as paying for the continuing education credits and expenses required to maintain one's license or certification.

Data Effective Date: 4/9/2025

Notes: The City has a number of positive attributes within the total package of health plan offerings, as described above

Table 36. Additional Comments

37. Additional comments:

Peer	Response
City of Appleton	
City of Beloit	
City of Eau Claire	
City of Green Bay	
City of Janesville	
City of Kenosha	
City of Manitowoc	
City of Oshkosh	Osh Kosh provided some documents that detail their unique benefits. We are happy to pass these along to the City of XYZ.
City of Sheboygan	
City of Wausau	
City of Wauwatosa	
City of West Bend	"Longevity Pay is only for Fire Union Employees. Our Health Insurance Plan is a Copay Only Plan - no deductible. Both Dental and Vision have four tiers. The Long Term Disability that the City provides is ICI through ETF. We also offer short and long term through an ancillary product, currently American Fidelity, which is 100% employee paid. We do not have separate banks for vacation/sick/personal as of 1/1/25. We have PTO which incorporates these. We also give an extra week per year for management at and over grade 70 of comp plan"
City of XYZ	

Data Effective Date: 4/9/2025

Footnotes:

Notes:

Exhibit4

City of ZZZ Compensation Study - Implementation Scenarios Summary (Based on 5/1/25 Employee Census)

Updated: 6/21/25

	Scenario Description	ATB Increase Percentage Before Implementation Calculations	# of Employees Receiving an Increase to Minimum	# of Employees Receiving Increase (From ATB and/or Scenario Actions)	Smallest Salary Increase	Largest Salary Increase	Avg Increase to Proposed Salary (excludes "0"/zero increases)	Total Cost (\$) to Proposed Salaries	New Base Payroll Total (\$)	Average Salary (\$)	Percent Change To Base Salary Payroll (%)
Current (Schedule Effective 1/15/2025)	"Total Cost All Salaries Column" (H) represents current baseline salary expenditures, based on Employee Report provided to Archer Company at beginning of study		N/A	N/A	N/A	N/A	N/A	N/A	\$10,216,012	\$51,080	N/A
Scenario 1	Once the ATB (general increase) has been applied to all employee salaries (optional), bring employees whose current salary is below the Range Minimum of their NEW pay grade, to the Range Minimum. No pay changes for any other employees (other than the ATB/general increase).	0%	98	98	\$33	\$12,666	\$3,715	\$364,028	\$10,574,701	\$53,139	3.6%
Scenario 2	No ATB is applied in this scenario. Maintain employees' current Compa-Ratio in the new pay grades and ranges. For example, an employee who is currently at Compa-Ratio of 50% in the current plan, is placed at a Compa-Ratio value of 50% in the new pay grade and range. If an employee's current salary exceeds the Compa-Ratio in the new grade/range, the employee retains current salary.	0%	98	147	\$139	\$17,930	\$5,744	\$837,957	\$11,048,630	\$55,521	8.2%
Scenario 3	Once the ATB (general increase) has been applied, this "compression reduction strategy" places each employee within new grade and range based on Years of Service in their current position. In that way, the longer an employee has been in their job, ideally, the higher their pay, compared to employees in the same job with less tenure. Compression is not fully solved, because employees already paid higher than the "target" maintain their current salary.	0%	98	148	\$0	\$30,051	\$6,887	\$1,012,325	\$11,206,821	\$56,034	9.9%
Scenario 4	In this scenario, employees are placed at a target salary based on length of time in their role and their current compa-ratio in the new range (current salary/new range midpoint). The rationale is to make adjustments that improve the market position of employees' salaries that are currently below the market reference point. Relatively larger increases are provided to employees with more tenure in their job and those that are currently the farthest from the market reference point in their assigned pay grade and range.	0%	98	176	\$20	\$14,631	\$3,121	\$549,343	\$10,765,355	\$53,827	5.4%
Recommended Implementation Strategy	Implement an across-the-board increase before applying Scenario 4, so that each employee receives at least an ATB increase.	1%	95	200	\$53	\$14,631	\$3,050	\$609,909	\$10,825,920	\$54,130	6.0%

Exhibit 5

Consultant Report to Project Team:

Compensation Study Services

for the

Town of XXX, North Carolina



April 1, 2025



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I. INTRODUCTION AND STUDY METHODOLOGY

The Town of XXX, North Carolina ("Town"), contracted with the Archer Company to provide comprehensive classification and pay study services and report the findings and recommendations of the study.

A. Objectives and Areas of Service

Several areas of service were identified for this study in order to meet the needs of the Town for a thorough, independent analysis of its classification and compensation plan:

- One. Ensure Employee Engagement in the Study Process:** This was accomplished by allowing employees the opportunity to learn about the study via orientation sessions, and the opportunity to tell us about their jobs through the use of position questionnaires. We also received significant management input through Department Director interviews, focusing on compensation and classification issues, market concerns, perceive inequities, etc.
- Two. Job Structure Optimization** – Through a thorough job analysis, job evaluation and job classification exercise, coupled with an understanding of the Town's vision and objectives for its classification plan and pay progression framework, we worked with the Project Team to optimize the Job Architecture into the appropriate number of job families, job classifications and job levels within a given series (e.g. Engineers, Planners, Administrative Specialists). Consistency and equity within the Job Architecture/Classification System is critical so that jobs that perform similar functions are categorized into the proper job family, and within each family, appropriate functions are identified and levels within each function.
We found the current Job Structure to be generally solid and effective. Relatively few changes were recommended in this area.
- Three. Creation of Career Progression Ladders and Identification of Minimum Qualifications** – From the Job Architecture phase we fully understood the true number of different job families, functions, and levels within functions. By clarifying Minimum Qualifications for each true job title, and by working with the Town to identify appropriate requirements to move through levels within each series, the Town can easily communicate potential career paths for employees. We also did review minimum qualifications and stated our opinion on relevant and appropriate minimum qualifications for each Town job classification.
- Four. Creation of Pay Progression Opportunities within Defined Career Ladders** - There are two general types of pay progression programs within career ladders and some organizations use a combination of both. In one type of progression between levels requires a substantial change (increase) in duties and responsibilities. The progression becomes a "promotion." In the second major type, which is employed at the Town of XXX, progression can occur based on documented evidence of an increase in skills and often requires additional education and/or certification. Upon an assessment of these factors, an employee is then eligible to move up to the next "level," with a pay increase and/or incentive for the acquisition of skills/certifications/licenses.

We believe the Town is headed in a positive direction in identifying jobs that lend

themselves to the formalization of career ladders. We are providing general policy guidance as part of our deliverables, under separate cover.

- Five. Ensure Market Competitiveness** – To ensure the Town provides competitive compensation and benefits in the marketplace, we partnered with the Project Team to develop a market strategy (identifying peers/competitors for example). Archer Company designed and conducted an extensive pay and benefits survey, supplementing peer data with published survey data as appropriate.

The market competitiveness review included understanding the market demands at all key points along the pay range: Minimums for hiring purposes, the Midpoint/Market Control Point, ensuring it is fully competitive at the market position desired by the Town (e.g. “at market”, “above market”) and the Maximums, ensuring appropriate salary growth is possible given the desire to retain trained, seasoned employees over the long run.

- Benefits:** Because benefits surveys can become tremendously complicated, we identified with the Project Team to understand the questions and concerns the Town has about its benefits program and created specific survey questions to gather peer practices in areas of specific concern to the Town.

- Six. Fair Labor Standards Act Compliance** – Through job analysis and job evaluation, each classification was assessed in terms of potential exemptions from overtime payment allowable under a set of “exemptions” allowed by the federal Fair Labor Standards Act. Jobs that meet one or more exemptions will be identified as “exempt” from legally required overtime and jobs that do not meet any exemption were identified as “non-exempt” and therefore eligible for mandated overtime per the FLSA requirements.

- Seven. Complete a Compression Analysis, Recommend Remediation Strategies with Estimated Costs** – Through a thorough diagnosis of the types of level of inequities present in the current pay plan, we identified recommendations including potential grade and even individual pay adjustments that will minimize inequities including pay compression.

Specifically we have provided a plan implementation strategy, where range placement in the new ranges is based on time in the employees’ current positions, therefore targeting the recommended pay for each employee based on how long they have held their current position. *This is the most appropriate compression reduction strategy for the specific issues found at the Town.*

- Eight. Draft a Compensation Philosophy for Town Approval** - This is a key step, and one which client often do not choose to undertake, so we commend the Town for examining and updating its current Compensation Philosophy.

We presented a framework with the key components of the Compensation Philosophy including 1. The Role of Compensation and Benefits, 2. Desired Market Position 3. Governance and 4. Communications. From the input of the Project Team, as well as feedback from Department Directors, and our deep understanding of best, contemporary practices among similar organizations, we have provided an expanded draft Compensation Philosophy for the Town to consider.

Many key decisions are made along the way such as the desired market position,

the degree of transparency the Town wishes to have in its compensation program and the role of performance versus tenure in pay progression. In the end, a solid Compensation Philosophy is very powerful in its ability to guide the Town in future compensation decision-making.

Nine. Recommend a Policy/Program for Pay Progression within Range – We had extensive discussions about the current pay progression plan, based primarily on periodic general increases with no specific connection to performance. We assessed, in partnership with the Project Team, that the Town is not prepared at the present time to shift to a pay progression plan based entirely or even significantly on employee performance. In this report we provide recommendations on annual actions the Town should take, in order to ensure pay increases provided in the form of a general increase are market competitive within the Town’s financial resources. We do think the Town may be a very good candidate for “pay-for-performance” with specific planning, preparation time and communication.

Ten. Provide a Set of Recommendations to Ensure Market Competitiveness of Total Compensation – From the market assessment and our deep experience in public sector compensation and benefits programs, we are delivering a set of recommendations aimed at preserving the Town’s desired level of competitiveness. Because we found Town pay levels to be, in many cases, “below” general market pay levels, the Town’s first task will be to move pay ranges up to be more competitive in the next year or few years (depending on financial resources). However, the market will undoubtedly continue to change, and while we do not know the level of change that will occur, we have given recommendations as to some simple steps to take to understand changes in the market, on an annual basis, to help inform key pay plan decisions (structure adjustments and individual pay increase budgets).

Eleven. Development of a New Pay Structure - We used regression analysis to draw a “pay line” based on the integration of market data and job evaluation points from the application of our trademarked job evaluation system, the Archer Matrix Point Factor Evaluation System. This methodology ensures an internally equitable grade structure coupled with market-competitive pay ranges. We built the recommended pay ranges (Minimums, Maximums, desired range width) based on several elements that were discussed with the Project Team, including:

1. Desired level of hiring competitiveness
2. Desired Maximum Pay versus market pay levels
3. The way in which employees move through pay ranges and the link to performance
4. The point of time in a job at which the Town believes the salary or wage should be fully competitive

These and other factors were used to create the optimal pay structure for the Town of XXX. *In partnership with the Project team, we created a “general” pay structure and a separate pay structure for “Police and Fire” positions. Both structures, however, are based on the same pay structure principles.*

Twelve. Compensation Policy Review – Based on input and discussion with the Project Team, we discussed policy needs facing the Human Resources Department. *In*

general we found the current policies to be solid, fair-minded, and consistent with contemporary public sector compensation guidelines for an organization of the size of XXX. There were a few areas identified by the Project Team that we have reviewed and are providing specific recommendations under separate

- Thirteen. Provide A Plan for Maintaining Competitiveness and the Compensation Philosophy** - This includes specific strategies for monitoring market position, inflation, compression, and internal equity annually and a series of steps to take once the analysis of said factors is complete. These steps would include the appropriate considerations to take, and supporting data to use, to determine periodic pay structure adjustments and the budget amount for the annual pay increase program. We are providing specific recommendations in **Section IV – Other Recommendations**.
- Fourteen. Create an Implementation Plan** – By fully understanding all results from the internal and external analysis, by learning the Town’s objectives, priorities, and pain points, we developed three implementation scenarios, calculating estimated implementation costs using an *interactive Excel model allowing us to model the estimated base payroll costs associated with different implementation models*. We provide estimated costs for each of the three options in **Section III** of this report.
- Fifteen. Human Resources Training for Program Administration** – Assuming the Town adopts the new pay plan, pay structures and job grading methodology, the Archer Company We will provide Human Resources Team training on job analysis, market assessment, job classification, job evaluation and managing job change – in order to support ongoing Classification and Compensation Program effectiveness. We will provide the content, tools, and resources to enable the Human Resources Team to administer the Classification and Compensation Plan independently over time.

B. Project Phases

To fulfill the project objectives, working with Town’s Project Team, the Archer Company completed the following nine (9) project phases, focusing our approach to ensure an alignment of the recommendations and all deliverables to the Town’s Compensation Philosophy, Human Resources strategy, and strategic and operational objectives.

Phase One: Project Initiation

This phase included relevant data-gathering, kick-off meetings, and agreement on project plan, objectives, and study steps.

Discussions were held with the Town’s Project Team to discuss expectations, gather information, and plan project implementation. The Archer Company worked with the Project Team and appropriate staff to obtain clarification regarding the Town’s organizational structure, classification and compensation concerns, expectations of study results, and other relevant matters. During this time, we will also collected relevant data and information and solidify the project timeline and mutual accountabilities. The following tasks were completed:

- A. **Project Plan:** The Archer Company finalized a specific project plan for the Town that outlines every task to be completed and due dates for key milestones and deliverables.
- B. **Meetings with the Project Team:** The Archer Company conducted meetings with the Project Team at key points during the project timeframe. Initially we focused on the

overall goals and objectives for the study, as well as specific concerns, from the perspective of top leadership within the organization, in order that our approach and methodology are in alignment with the needs of the Town. We gained valuable insight in the following areas:

1. The Town's mission, vision, and values
 2. Stakeholders' expectations of the process and deliverables
 3. Identification of roles and responsibilities
 4. The Current Classification and Compensation Plan, pay structure, and salary administration guidelines
- C. **Meeting with Department Directors:** The Department Director meeting was held to introduce our firm, the team, and our background. We previewed the study timeline, phases, and ways in which their input would be gathered and be important to the success of the study.
- C. **Review the Current Classification and Compensation System:** Through several working sessions, we performed a qualitative and quantitative review of the Town's current classification plan and all aspects of its pay delivery system. This work kicked off in Phase One.
- D. **Review the Current Organizational Structure and Reporting Relationships:** We reviewed all organizational charts, job descriptions, assignment of functions, and job titles for each department.
- E. **Review the Current Career Ladders, Job Series and Pay Progression Plans:** We came to understand the Town's identified job families, job series, career ladders and pay progression plans/policies to establish a baseline.

Phase Two: Job Analysis, Evaluation, Classification and Definition of Job Architecture

The intent of this phase was to analyze each position and apply sound job evaluation and classification analysis processes to establish an internally equitable Classification Plan. Granular data gathered through this process was used to fully understand each specific role that is present at the Town and then to define job families, job series, and levels of work within each job series. Minimum qualifications were defined and vetted with leaders, also to be used in the development of the final classifications, job series and job levels. This step included several crucial activities.

The critical methodologies utilized by The Archer Company to support this objective around internal equity were structured job analysis, job classification, and job evaluation.

The purpose of this key phase of the project is to ensure that the classification structure is appropriate and reflective of the Town's philosophy of job classification, that all positions are properly classified, and that the job evaluation for each classification (and therefore the pay grade) is consistent with the work performed. *This process became the foundation of the pay plan's principle of internal equity.*

The Archer Company established internal equity in the pay plan by conducting a job analysis of every Town position (with the exception of represented law enforcement roles), ensuring a logical and internally equitable classification structure and plan, and evaluating classifications using our copyrighted point factor evaluation system.

The analysis utilized our tailored job analysis questionnaire (called the "Comprehensive Position Questionnaire" or "CPQ," completed by Town employees, with input and review provided by the manager and department director. *Additional input was gathered through individual interviews with department directors.*

Specific **Phase Two** tasks completed by the Archer Company are described below:

A. **Job Analysis:** A detailed job analysis was performed for every position included in the study for two primary purposes:

- Ensure that each position is properly defined and aligned within the pay plan based on job duties, responsibilities, and qualifications
- Provide the information needed to establish the most appropriate classification plan for the Town and to ensure each position is properly allocated to the correct classification

The Archer Company utilized two integrated methods of conducting job analysis: the use of a thorough position questionnaire and information gathered from each department, and in-depth interviews with all department directors supplemented by job analysis interviews with representatives of each current job title.

1. **Employee Questionnaires:** The Archer Company copyrighted CPQ questionnaire has proven a highly effective tool to gather in-depth data about each position without placing too high an administrative burden on employees. The questionnaire data is essential to the proper analysis, classification, and evaluation of the Town's positions and will also be used to update job descriptions. *Every question has a purpose.*

We received an excellent response rate for virtually all *Comprehensive Position*

Questionnaire (CPQ) needed for our team to complete a thorough review of each Town job title.

The Archer Company asked that department management review each completed CPQ to make sure they were complete and accurate, and to provide management perspective on minimum qualifications and other key attributes of each job title. In fact, Department Directors play a key role in ensuring that all information collected from employees provides accurate, thorough, and quality data for use in the job analysis of their subordinate positions.

2. **Interviews:** The Archer Company conducted interviews with each Department Director and in some cases direct reports to the directors, for **four key purposes**:

- Review the departmental structure and operations, including all reporting relationships and interrelationships between positions
- Understand how the department is impacted by the classification and compensation plan under the current state, and
- Review and discuss specific classification and compensation concerns
- Receive answers to questions we had from reviewing the CPQs

Each Department Director also completed a tailored **Department Director Issues Form** to gather specific information with respect to any and all classification and/or compensation concerns.

- B. **Classification of Positions:** All positions within each classification were reviewed and analyzed against the information captured in the job analysis phase. Each position was reviewed to ensure that (1) essential functions are accurate and up to date; (2) knowledge, skills, competencies, and abilities are identified; and (3) minimum qualifications (criteria for entrance), physical requirements, and environmental factors are reflective of the work performed.

We discussed the ***current classification system and philosophy*** with the Project Team around such issues as preference for specific versus broad classifications, the utilization of “job series”/career ladders for career progression and the preferred format for classification specifications.

Based on the input from the Project Team and our analysis of the current classification structure as it relates to the actual duties of the various Town job roles, The Archer Company made final recommendations as to the appropriate classification for each existing position and in some cases, new classification series were added to better categorize certain jobs in a fair and equitable way. *Relatively few major changes were made to the current Classification Structure, as we found it to be solid and equitable in general with only minor changes recommended.*

The Archer Company did pay particular attention to just a few critical or problem classification areas identified by the Department Directors and senior management.

Once the final classification plan was determined and each classification clearly defined, we completed three other key tasks:

1. Defined the appropriate ***distinguishing characteristics between levels*** in each classification series for clarity purposes and to assist with allocation of individual

positions,

2. **Allocated each position** to ensure assignment to the appropriate job classification, and
3. **Discussed potential changes to internal ranking** of classifications.

- C. **Job Evaluation:** To ensure the outcome of **internal equity**, the Archer Company used our valid and reliable quantitative job evaluation system to objectively measure and determine the relative worth of each classification to the organization. The Archer Company utilizes the **Archer Matrix Point-Factor Job Evaluation System** as our primary method to objectively measure and determine the relative worth of each classification to the organization.

Jobs with similar point scores were placed together in the same pay grade. This is the basis of an internally equitable pay plan.

- D. **FLSA Evaluation:** Each classification identified in the study was evaluated against the potential FLSA exemptions (administrative, executive, etc.) to determine if the classification meets one or more of the tests and can therefore be classified as “exempt” under the FLSA. If none of the tests are met, the job was categorized as “non-exempt.”

While the Archer Company has significant experience with FLSA analysis and determinations, we are not attorneys. Our recommendations should be reviewed by legal counsel.

- E. **Refinement of the Town’s Comprehensive Job Architecture:** A job architecture refers to the organization of each job title identified in the job analysis and job evaluation phase first into job families, then into functional areas, and then into levels within each functional area. *The determination of the number of levels was a key decision.*

As stated earlier, the Town’s Job Architecture was found to be very sound, and relatively few class titles were added or eliminated. Similarly very few employees were recommended for a classification title change.

Phase Three: Finalize and Execute a “Market Assessment Strategy”

This phase involved the finalization of the process we used to measure market competitiveness and current market conditions via the completion of a comprehensive market assessment.

The Town’s compensation program is a key aspect of competitiveness. This study focused on ensuring results support the Town’s Compensation Philosophy including the Town’s desired “market position.”

The goal of this objective was to provide a robust picture of the Town’s current pay as well as key benefits programs with respect to the Town’s intended level of competitiveness. From that analysis,” we created recommendations and an implementation plan to align the pay structure and benefits programs to the desired market position.

The end of this task was marked by the presentation of a detailed report on the Town’s market competitiveness overall and for each of the benchmark jobs included in the Market Assessment. Prior to that time, several key decisions were made in conjunction with the Town about the true market in which the organization competes, and then the Archer Company conducted a comprehensive survey process to give the Town’s a full and complete picture of

its competitiveness at this time.

Specific **Phase Three** tasks we completed are described below:

- A. **Identification of “Benchmark” Positions and Pay Practices Questions:** The Archer Company worked with the Project Team to identify the list of benchmark classifications to be included in the custom survey and included in the use of published survey data.

Every good market study requires us to make sure and select jobs that represent the continuum of the Town’s classifications, focusing on: (1) positions/classes which are widely recognized as possessing similar job content in most organizations; (2) positions/classes which represent a substantial number of employees as well as the various job families; (3) jobs that are considered to be core functions that serve to anchor the pay plan; (4) positions/classes for which the Town’s may have had difficulty recruiting and retaining a qualified work force; and/or (5) positions/classes which represent the full spectrum of salary grades and ranges in the pay plan (including executive and various administrative classifications).

- B. **Identification of Organizations to Be Surveyed:** Based on the Project Team’s feedback on recruitment and retention outcomes, with some input from Department Directors to the Project Team, we surveyed 21 peer organizations focusing on similarly situated organizations with whom the Town is truly competing for talent. The Town approved the final list of targeted survey participants. Employers with the following characteristics are typically surveyed: (1) organizations with which the Town clearly has been competing for employees; (2) organizations which are recognized as important, or influential, in the local marketplace; (3) organizations which are within proximity to the Town’s competitive market (i.e. the same geographic region); and/or (4) organizations with similar population, demographics, and scope of services.

- C. **Creation of Customized Web-Based Compensation Survey:** The Archer Company constructed a customized survey designed to collect the data requested by the Town. The Project Team will be asked to approve the final survey document.

- D. **Custom Survey Data Collection:** The Archer Company uses a very “hands-on” approach with survey participants to facilitate ease of participation as well as to maximize participation for our clients.

We identified the contact information for the targeted organizations. Each organization was contacted by phone to invite their participation prior to distribution of the survey.

The Archer Company contacted each participant after the survey has been distributed and provide any follow-up assistance needed to complete the survey.

The Archer Company examined all survey responses and contacted participants as needed to clarify their responses and to solicit additional information as necessary to ensure that appropriate comparisons are made.

Collection of Published Survey Data to Supplement Custom Survey: In this step we compiled, organized, and analyzed additional data from well-respected surveys in our possession, to acknowledge the role of private sector in the market in which the Town is competing.

We used published survey data for the base salary competitive analysis and also to gather market data on key compensation administration policies, and trends in pay

structure adjustments and individual pay adjustments.

- E. **Create and Present a Market Competitiveness Report:** We prepared a detailed report on the current competitiveness of the Town's compensation overall and with specific detail for each of the job titles assessed.

With regard to the **Benefits Program**, we provided a comparison of the Town's programs (employer/employee costs, major plan provisions) against the prevalent market practice and make specific recommendations.

Phase Four: Pay Structure Development and Recommendations for a Pay Progression Program

Based on the results of direction we received in an initial working session as well as Department Director input; we developed specific pay structure recommendations.

The Archer Company incorporated our findings from the review of the current Classification and Compensation Plan, as well as the Market Assessment, in order to provide recommendations for the Town's pay structure. This phase constituted several steps:

- A. **Pay Structure Working Session:** We conducted a working session with the Project Team to understand the market results and gain input on the strengths and potential weaknesses of the current pay structure.

Part of this discussion required us to focus on understanding whether the Town wished to have a consistent market position with each employee department/job function or whether there was an interest, and perhaps market rationale, for using more aggressive ranges for certain groups.

As we created the proposed structure in this phase of the project, our goal was to ensure the structure supports and facilitates the Town's objectives, Compensation Philosophy, and operations. The creation of a compensation structure, or structures, involves a detailed understanding of the Town's human resources objectives as well as philosophy with regard to compensation, so that the structure supports both elements as well as appropriately balances internal equity and market competitiveness. Key structural elements such as the number of pay grades and pay range width are recommended based on a thorough understanding of the Town's Compensation Philosophy and policies with respect to key "compensation events" such as hiring salaries, promotions, and reclassifications.

- B. **Final Pay Plan and Pay Structure Design:** A full understanding of the Classification Plan, input from the Project Team and Department Directors and of course the market data provided the necessary input to create a structure or structures that best aligns with the Town's unique challenges and concerns.

In the end we created two pay structures, one for "General" employees and a second for "Public Safety" certified/commissioned roles. Details on the two structures are described in the next section of this report.

Phase Five: Pay Compression Diagnostic and Strategy Process

We completed a thorough compression analysis and created remediation strategy recommendations.

The intent of this phase was to fully understand the nature of the compression issues at play, measure the degree of severity, and work with the Project Team to explore and cost out potential remediation strategies. In the end we created a plan implementation strategy to provide some relief to pay compression found in the pay plan, despite a very proactive strategy used by the current Human Resources Department to minimize compression by careful setting of starting salaries.

Phase Six: Development of a Compensation Philosophy

The Archer Company's consulting philosophy recognizes the integration of all aspects of the compensation architecture and relates them to the larger issues of the human resources function, including organizational commitment, work content and workforce planning.

A Compensation Philosophy should address several important items including desired market position, governance, role of benefits, communication, and compensation administration.

We reviewed the Town's current Compensation Philosophy and based on input throughout the project, we drafted a total compensation philosophy. We have discussed the draft with the Project Team as a *separate deliverable*, discussed questions and concerns, and integrated that feedback into a final document. We hope the enhanced Compensation Philosophy will serve as a foundation and guidance for the Town administering its pay delivery system. Our recommended Compensation Philosophy is designed to provide positive messages to Town employees and other stakeholders about the comprehensive nature of the Town's Total Compensation Plan and commits the Town to ensure the Plan remains competitive and aligned with the Town's strategic objectives as well as human resources objectives.

Key Finding: Internal Consultation Provided by Human Resources

The Compensation Philosophy presentation provided to the Project Team provides a summary of the input Archer Company received on the current Compensation Plan by the Town's Department Directors. There were a number of themes we heard in the feedback but wish to emphasize one important finding. Town Department Heads routinely expressed their recognition and appreciation that the Town's Human Resources Team provides high quality internal consulting to them. The Human Resources Team was described as providing valuable partnership in assisting Department Directors in the determination of appropriate compensation for new hires, promotions etc. and in collaborating with them on recruitment and retention issues in today's challenging labor environment.

Phase Seven: Develop a Compensation Plan Implementation Action Plan

In this phase we provided options for timing and expenditure levels that align with the Town's compensation objectives and philosophy.

With the preceding objectives complete, The Archer Company worked with input from the Project Team to create three options for the implementation of the new pay structures. This included the steps and costs necessary to move all employees into the new structure or structures, ensure all employees are paid at their new Range Minimum, and then consider options for placement of employees into the new pay grades and ranges.

To support the costing of our recommendations, The Archer Company collected current payroll and supplemental information. Each employee was assigned to a job title, pay grade and salary range. The implementation options were based on significant input from the Project Team, and

indirectly, input from the Town Manager's Office.

Phase Eight: Review and Make Recommendations on Other Key Elements of the Town's Compensation Plan Including Compensation Policies

Primarily, this included a review of the Town's needs and challenges with respect to the Plan, and then providing best-in-class compensation policies and practices that are suitable for the Town's situation and objectives.

We conducted two working sessions with the Project Team, reviewing current policies as well as concerns and "pain points" within the current Compensation Program. ***In general we found few issues of concern about policies per se. The Town's largest pain point, it was clear, is continued struggles to successfully attract sufficient applicant pools, find the best candidates, and in some areas, retain employees. It is thought that pay levels in many areas are not competitive within the Town, and this is seen as a significant contributor to recruitment and retention issues. Our market analysis confirmed significant variance between the pay ranges of many Town jobs and pay ranges and levels in the competitive market.***

Based on a review of the current Compensation policies, as well as an analysis of market data collected in this study and best "contemporary" practices of similar employers, The Archer Company has prepared pay practice recommendations in specific areas requested by the Project Team:

- Reclassifications
- Definition of Work Period (FLSA Requirement)
- Compensable Time (FLSA Requirement)
- Managing pay within Pay Ranges
- Recognition for Exempt Employees
- Career Progression Ladders Policy
- Managing Base Pay Within a Defined Range (and the role of the Range Maximum)
- Cyclical Review of Job Classifications
- Supervisor/Direct Report Compression Adjustments
- Certification/License Completion Pay

The Archer Company was retained to provide policy feedback and recommendations. The Town will be able to incorporate our pay practices recommendations in the creation of new, or refinement of existing, pay policies and programs in these areas.

Phase Nine: Draft and Final Reports; Develop Communications Plan

Provide and present a draft and final report and present the report to the Town Council in an oral presentation and create a Communications Plan for appropriate communications about study findings and recommendations.

We are now delivering the Final Report and are happy to present our findings and recommendations to Town Council as requested. Similarly we are prepared to work with the Project Team to create appropriate communications for the socialization of the study findings and recommendations to Town employees.

Phase Ten: Human Resources Training for Program Administration

Create and provide a training program to prepare the Human Resources Team to administer the new Classification and Compensation Plan and new policies and protocols.

Assuming the Town adopts our pay structures, job evaluation and/pay grading methodology and recommendations for maintaining competitiveness, as contained in this report, we will provide Human Resources Team training on job analysis, market assessment, job classification, job evaluation and managing job change – in order to support ongoing Classification and Compensation Program effectiveness.

We will provide the content, tools, and resources to enable the Human Resources Team to administer the Classification and Compensation Plan independently over time.

Topics to be covered include understanding job changes and effective job analysis, use of the Archer Matrix Point Factor Evaluation System, market assessment, integration of market data and internal evaluation scores to ensure plan effectiveness, administration of the Pay Progression Plan associated with movement through Job Series and other progressions, and annual decisions that are necessary to maintain the market competitiveness of the Compensation Plan (i.e., pay structure adjustments, pay increase budgeting).

II. STUDY FINDINGS AND DISCUSSION

A. Job Analysis, Job Evaluation and Job Classification

We analyzed and evaluated a total of 90 job titles or classifications within Town through the review of CPQs and other job documentation and interviews with the Department Directors. These job titles represent approximately 185 current positions as well as a handful of vacancies within the Town at the present time.

Job Evaluation and Internal Equity: The Archer Company adheres to the principle that an employee should be paid in accordance with the degree of complexity associated with his or her job. This principle is fundamental to the concept of internal equity. The importance of internal equity in an organization's pay plan – especially for organizations dependent upon taxpayer funding – cannot be overstated. To achieve internal equity in any employer's pay structure, it is necessary to employ an organized and rational job evaluation system to determine the relative worth of jobs.

As stated earlier, The Archer Company utilized the Archer Matrix Point Factor Job Evaluation System™, which is a copyrighted, matrix-point-factor job evaluation system developed by the late Earnest R. Archer, Ph.D., P.E., and founder of the Archer Company. Supported by 25 years of research and testing and an additional 30 years of use in hundreds of organizations and further supported by well-defined criteria and verifiable job information, it is a highly dependable evaluation method.

The purpose of the Archer Job Evaluation methodology is to:

- 1) Provide a common system to evaluate the degree of difficulty of all jobs in the organization against a set of universal criteria
- 2) Determine the relative worth of jobs in the organization in accordance with the degree of difficulty associated with each job, (i.e., to establish *internal equity* in the organization's pay structure)
- 3) Provide an objective basis for establishing pay grade levels for jobs in the organization
- 4) Provide the independent variable necessary to integrate with the salary survey data to develop a pay structure that possesses both *internal equity* (job evaluation) and *external equity* (market analysis)

The Archer Matrix-Point-Factor Job Evaluation System employs universal factors that address work requirements, aptitude factors, and responsibility factors. Each job is evaluated using a matrix-point-factor method that involves the analysis of a combination of work requirements, aptitude factors and responsibility factors listed below.

Work Requirements

- Data Utilization
- Human Interaction
- Equipment, Tools, and Materials Utilization

Aptitude Factors

- Language/Verbal Comprehension
- Mathematical
- Functional Reasoning
- Situational Reasoning
- Dexterity
- Physical Effort
- Sensory Awareness
- Previous Experience
- Education
- Environmental Adaptability

Responsibility Factors

- Managerial Span of Control
- Scope of Planning
- Financial Accountability

Applying the Archer Matrix-Point-Factor Job Evaluation System involves determining the relationships between the degrees of difficulty associated with the work requirements and the degrees of difficulty associated with the aptitude factors. These relationships determine the total evaluation point score for a job. In addition to the work requirement and aptitude factor determination, the three responsibility factors are applied to each job. The responsibility factors are summarized as a multiplier and are considered to apply to all aspects of a job. Consequently, the responsibility factor multiplier is applied to the evaluation point total.

The job evaluation process yields a quantitative measurement stated as evaluation points which are based on the job content, which is the duties, responsibilities, and the qualifications required for each job. The point totals derived from the evaluation process are then translated directly in the establishment of pay grades in the pay plan. The pay grade represents a way of defining the relative value of each job to Town. *All jobs in the same pay grade are considered to be of very similar value to Town.* Accordingly, jobs assigned to higher pay grades are considered to be of greater value to Town in terms of job complexity, responsibilities, and required knowledge, skills, and experience and thus, will have higher pay ranges measured in dollars than jobs in lower pay grades.

This report reflects the FINAL determinations with respect to job classification/job titles, pay grades, and pay ranges.

B. Salary Survey Process and Analysis

The Archer Company adheres to the principle that an organization's pay structure must possess competitive integrity (i.e., the ability to secure a competent labor force from the labor market(s) in which it competes with other organizations for its labor supply) without harming

its relative competitive position with regard to the cost and pricing of its products and services. This principle is fundamental to the concept of external equity.

The impact of current labor market conditions and basic supply-and-demand economics must be considered when developing an organization's pay structure. Jobs that have an adequate applicant pool can usually be recruited at a pay rate that may be lower than absolute reliance on job evaluation indicates. Conversely, jobs that have a limited applicant pool may require compensation higher than the job evaluation indicates.

Selection of Benchmark Jobs

Benchmark jobs typically represent the continuum of an organization's jobs, focusing on jobs which are likely to be found in other similar organizations; jobs which represent a substantial number of employees; and jobs which represent the diversity of an organization's workforce in terms of department functions and pay levels.

In the market assessment, we benchmarked 50 Town job titles, covering about 50% of current Town job titles and about 55% of Town employees.

Because we utilized best practices for survey sample selection (variety of disciplines, pay grades, utilization of commonly found jobs in the market), these statistics are more than what is required to develop a compensation structure integrating internal and external equity principles.

With respect to **Pay Practices questions**, we worked with the Town to add 16 additional questions that query peer pay practices around key compensation events such as pay structure increase practices; pay increase budget practices; and a variety of supplemental pay practices.

The benchmark jobs in the classification and compensation study are listed in **Table 1**:

Table 1: Benchmark Jobs Utilized in Classification and Compensation Study

The Town of XXX Benchmark Positions	
1. ADMINISTRATIVE ASSISTANT	
2. CAPITAL PROJECTS MANAGER	
3. CHIEF RACE AND EQUITY OFFICER	
4. CHIEF SUSTAINABILITY OFFICER	
5. CODE ENFORCEMENT OFFICER I	
6. CODE ENFORCMENEMT SUPERVISOR	
7. COMMUNICATIONS AND ENGAGEMENT DIRECTOR	
8. CUSTODIAN	
9. DEPUTY FIRE CHIEF	
10. DEPUTY PLANNING DIRECTOR	

11. ECONOMIC DEVELOPMENT DIRECTOR	
12. ENGINEER I	
13. ENGINEERING INSPECTOR	
14. ENVIRONMENTAL PLANNER	
15. FACILITIES SUPERVISOR	
16. FINANCE DIRECTOR	
17. FIRE CAPTAIN	
18. FIRE CHIEF	
19. FIRE DRIVER OPERATOR	
20. FIRE INSPECTOR	
21. FIRE MARSHAL	
22. FIREFIGHTER/RELIEF DRIVER	
23. GIS ADMINISTRATOR	
24. GIS TECHNICIAN	
25. HUMAN RESOURCES ANALYST	
26. HUMAN RESOURCES DIRECTOR	
27. IT DIRECTOR	
28. IT OPERATIONS MANAGER	
29. IT SUPPORT ENGINEER I	
30. IT SYSTEMS ADMINISTRATOR	
31. MAINTENANCE/CONSTRUCTION WORKER I	
32. MECHANIC I	
33. PAYROLL AND BENEFITS COORDINATOR	
34. PERMIT TECHNICIAN	
35. PLANNER	
36. PLANNING DIRECTOR	
37. POLICE CHIEF	
38. POLICE LIEUTENANT	
39. POLICE OFFICER	
40. POLICE SERGEANT	

41. PROCUREMENT COORDINATOR	
42. PROGRAM SUPPORT ASSISTANT II - FT	
43. RECREATION SUPERVISOR	
44. SOLID WASTE EQUIPMENT OPERATOR I	
45. SOLID WASTE EQUIPMENT OPERATOR III	
46. SOLID WASTE SUPERVISOR	
47. STAFF ACCOUNTANT	
48. STORMWATER UTILITY MANAGER	
49. STREETS AND GROUNDS SUPERVISOR	
50. TRANSPORTATION PLANNER	

Definition of Town's Labor Market

Archer worked with Town to twenty one (21) organizations with whom Town believes are direct talent competitors in the public sector and are within a "commuting distance". We were confident that the Town had sufficient evidence to support the fact that as an employer, XXX in fact competes with each of these organizations, for many of the 50 benchmark positions selected for analysis.

In the end we received data from 20 peer organizations in the custom survey and we utilized private sector published data to incorporate private sector pay levels for Town benchmark positions that exist in the private sector.

The 14 peer organizations are listed in **Table 2:**

Table 2: The Town of XXX (Town) Peer Participating Employers

Town of XXX (Town) Peers Used in the Market Assessment	
1.	Orange County
2.	Town of Chapel Hill
3.	Town of Cary
4.	Town of Apex (did not participate)
5.	Town of Pittsboro
6.	Town of Fuquay-Varina
7.	City of Mebane
8.	Town of Hillsborough
9.	City of Durham
10.	Town of Garner

11.	Town of Holly Springs
12.	Town of Morrisville
13.	Chatham County
14.	OWASA (Utility)
15.	City of Burlington
16.	Town of Clayton
17.	City of Graham
18.	City of Asheboro
19.	City of Sanford
20.	Alamance County
21.	Town of Wake Forest

We received data from all but the Town of Apex, therefore our data set was very robust, allowing us to create a well-rounded view of the current level of competitiveness for a large sample of Town positions from multiple grades, job families and departments.

Data Adjustments for Custom Survey Data

Two kinds of data adjustments were made to the raw data supplied by the 20 public sector peers:

Geographic Adjustments based On Wage and Salary Differentials (Cost of Labor)

To reflect the geographic differences in salaries between each surveyed employers' location and the Town of XXX, we adjusted the reported salaries using the geographic wage and salary differentials reported by the Economic Research Institute (ERI) Geographic Assessor as of 10/31/2024. The Economic Research Institute (ERI), Geographic Assessor provides cost-of-labor comparison data enabling us to adjust market data to reflect differences between the cost of labor for the Town of XXX and the peer organizations from whom salary data was gathered and used in the peer market study.

It is important to note that the cost-of-labor differentials do not necessarily reflect cost-of-living differences. ERI has found that cost-of-living differences (which reflect the supply and demand for goods and services) are not a good predictor of salary levels. In other words, while the cost of housing (or other goods and services) in XXX may differ from the cost of housing in another peer location by a certain percentage, the prevailing salaries may not differ by the same percentage.

Three (3) peers (Durham, Orange County and Chapel Hill) required adjusting raw market data down by amounts of less than 0.5% (indicating slightly higher costs compared with XXX). The other sixteen peers not located in XXX required adjustments up, ranging from 0.3% to 19% (Sanford), indicating lower costs compared with XXX).

Workweek Adjustments

For non-exempt jobs only, we also adjusted the market data based on scheduled work week for non-exempt positions that have a work week different than the Town's full time work week. For example, both the City of Asheboro and Town of Cary report a 2,080 full time schedule for many non-exempt jobs where XXX has a 1,950 annual work schedule. In those cases, the raw data were adjusted down by a small percentage to reflect a lower annual hour's expectation at the Town of XXX (2,080 versus 1,950 hours is a difference of 130 hours).

Addition of Private Sector Data

A number of XXX jobs exist in the private sector. Department Director interviews confirmed that the Town is in fact competing with many local/area businesses for talent. Therefore we utilized the Economic Research Institute ERI Salary Assessor Survey, which provides data on thousands of U.S. employers, to provide "general industry" data for 31 of the 50 benchmark jobs. General industry data from this survey includes organizations from all sectors including private sector (all industries reported in the survey) as well as any data reported by public sector organizations.

Because we only added private industry data from one survey, the overall weighting of the private industry data for these jobs is not skewing the overall results. In other words, the vast majority of all data points are coming from the public sector peers listed above.

Benchmark Jobs Market Findings

As information was compiled from the peer agencies, and in some cases supplemented by data available on the participant's websites, the Archer study team reviewed the data for reasonableness and accuracy. In some cases, an organization did not have an appropriate match for a particular benchmark job. **Exhibit 1** details the results of the benchmark market analysis, titled "Pay Range Competitiveness Report". *In this exhibit, we provide a comparison of the key elements of Town's current pay structure to the market: Pay Range Minimums, Midpoints and Maximums.*

Overall, Town's pay structure is below the market median on all key comparisons. The overall findings of this comprehensive survey are shown on the "Overall" line of the chart shown on Exhibit 1, which presents the key market comparisons (Minimum, Midpoint and Maximum) for each benchmark job:

- On average, XXX's Range Minimum rates are at about **87%** of market
- On average, XXX's Range Midpoint rates are at about **86%** of market
- On average, XXX's Range Maximum rates are at about **85%** of market

Exhibit 1 summarizes the market analysis in terms of the current competitiveness of The Town of XXX (Town)'s pay ranges. In terms of comparing the Town's pay structures to the market, there is considerable variation between positions, however. In **Exhibit 1**, we use green highlighting to indicate jobs where the Town's rate is 10% or more above market, yellow highlighting where Town's rate is more than 10% below the market value,

and finally red highlighting where the Town's rate is more than 20% below the market value.

There are only two (2) jobs where the Town's Range Midpoint exceeds the market by more than 10%. However, there are 22 jobs (45% of the surveyed jobs) where Town's Midpoint is more than 10% **below** market and another 12 jobs (24%) where the Town's Midpoint is more than 20% below the market value. Overall in the case of 70% of the benchmark jobs, the Town's Midpoint is at least 10% below the average Market Midpoint. Similar findings for Range Minimums and Range Maximums can be seen on **Exhibit 1**.

We typically advise that if an organization's pay range midpoint is within +/- 10% of the "average" market value, the job is paid fairly from an external competitiveness standpoint. We use this principle in developing our new salary ranges.

The structure at The Town of XXX (Town), overall, is less than competitive for more than 2/3rds of the surveyed jobs. This is true at the Range Midpoint and as discussed above Range Minimums and Maximums are generally less than competitive as well. The Town also reports difficulty in attracting and retaining some positions.

The Town's compensation policy articulates a goal of providing a total compensation plan that enables the Town to "attract and retain a diverse and high-quality workforce" (excerpt from III. Pay Plan Philosophy of Town of XXX Pay Philosophy and Administrative Policies, Effective 4.1.2023). Our market findings indicate that in many cases, current pay ranges are unlikely to support this important objective in the short-run and certainly in the long run. The new structure is designed specifically to support the Town's compensation philosophy.

The results and recommendations of this project will serve to bring all Town pay ranges into line with the "competitive range" which we define as Range Midpoints within 10% +/- of the Average Market Midpoint for the defined labor market. The new pay ranges in our recommendations will ensure that the lower end of the new pay ranges, which represent typical "hiring ranges" within the larger range will enable Town to attract and hire qualified employees. The higher end of the pay range will support the Town's objective of retaining qualified, high-performing employees in whom the Town has invested in training and development over a period of time.

Pay Practices and Select Benefits Market Findings

We collected pay practice information from the peer organizations that participated in the custom survey. The results of the Pay Practices and Select Benefits survey of the peer employers are provided in **Exhibit 2**.

Overall we found that Town's practices in the areas covered in the Pay Practices and Benefits survey are quite competitive.

There are just a few areas where the Town's policy or practice is not consistent with general market practice. Importantly, there are three areas surveyed where the Town's benefits are "above" the general market practice:

1. **Employee Health Plan Out-of-Pocket Maximums:** One "bottom line" approach to comparing the Town's Employee Health Plan to typical employer practices is to focus on the maximum "out-of-pocket" money amount an employee would

have to pay annually for any and all health expenses including co-pays, prescription drugs, etc. and compare it to market averages. *In this regard it appears the Town's Employee Health Care Plan is very generous.*

Virtually all US workers in an employer-sponsored health plan are limited in the cost-sharing they must pay in a year, as regulated by the federal Department of Health and Human Services (HHS). This limit is referred to as an "out-of-pocket maximum." The Affordable Care Act (ACA) limits the out-of-pocket maximum to no more than \$8,300 for single coverage and \$16,600 for family coverage in 2025.

According to the Kaiser Family Foundation's annual survey of Employer-Sponsored Health Coverage, titled the "Employer Health Benefits" 2024 edition, the average out-of-pocket maximum for Employee-Only Coverage for small firms (1-200 employees) with non-HDHP Plans, was \$5,104, compared to \$1,000 at the Town of XXX. The \$1,000 annual amount at XXX is far less than the market average of \$5,104 and even farther below than the legal maximum of \$8,300 per year (2025).

While the KKF Survey does not provide market data on out-of-pocket maximums for Family Coverage, it is highly likely that the town of XXX's Family Coverage out-of-maximum of \$2,000 (the amount is the same with 2 or 10+ dependents) is considerably less than the average market out-of-pocket maximum for family coverage.

2. **Employee Health Plan Premiums:** Out-of-pocket maximum analysis excludes premiums paid by employers and/or employees for employee health care. Employer-Sponsored Health Care Plan premiums can be another considerable expense for the employer and employee, depending on how the premium costs are shared by the employer and employee.

We have analyzed premiums paid by both the Town as the employer and the employees, for both "employee-only" and family coverage, compared to data from the Kaiser Family Foundation Survey:

Table 3: Comparison of Employer and Employee Health Coverage Premium Contributions at the Town of XXX and Among U.S. “Small Firm” Employers (Kaiser Family Foundation, 2024)

Coverage Type	Market Average Monthly Premium Paid by Employer	XXX Monthly Premium Paid by Employer	Market Average Monthly Premium Paid by Employee	XXX Monthly Premium Paid by Employee
Employee Only Coverage	\$661	\$844	\$100	\$0
Family Coverage	\$1,436	\$1,793	\$663	\$600

These findings indicate that the Town of XXX offers a distinct market advantage to employees choosing EMPLOYEE ONLY COVERAGE, in that there is no premium required to be paid by the employee at present. This fact “saves” these employees about \$1,200 annually compared to national averages for EMPLOYEE contributions toward EMPLOYEE ONLY coverage.

Second, in terms of FAMILY coverage, the employees at XXX pay a monthly premium for FAMILY coverage that is 9.5% less than the market average. This finding, coupled with a maximum out-of-pocket expense of \$2,000 for any and all medical expenses that may be incurred by *all family members*, strongly suggests that the Employee Health Care Plan at the Town of XXX is very competitive.

While we note that the total premiums paid by employer and employee at XXX are higher than the market average, we note that the market data includes all major plan types including point of service, HDHP, and HMO plans.

3. XXX's vacation, sick and personal time off programs are competitive. The overall comparison of “paid time off” places XXX in a very favorable position in the market
4. XXX's total paid time off program exceeds the market by 1-3 days, depending on how you count it
5. The Town's benefit for Paid Caregiver Leave is present only among a small number of peers and should be seen as a “competitive advantage” for XXX in recruitment and retention.

It is important that these benefits are well-communicated to applicants and potential applicants in order for the Town to maximize the benefits of the additional investments they

make in these program areas.

The few areas where XXX's pay practices or benefits are outside of the prevalent pay practice are:

1. Although there are several peers that do not adjust their pay structures on a scheduled basis, e.g., every year or every other year, most peer organizations adjust their pay structures annually. XXX does not have a defined period for considering pay structure adjustments.
2. Whereas the Town of XXX does not use defined data sources for determining pay structure adjustments, the majority of peers use one or more of the following data sources to make their pay structure decisions: Consumer Price Index, Employer Cost Index, WorldatWork Work or other major survey or consulting firm
3. The majority of peers (all but one) use "performance" as one of the criteria to inform employee pay increases. XXX's practice of excluding "performance" from the pay increase decision process is not consistent with the prevalent market practice.
4. XXX's practice of no additional "benefit" for hours beyond the normal workweek for "exempt" employees is not consistent with the predominant market practice, which is to provide some type of recognition or remuneration for these hours. These provisions tend to take the form of "comp time (hour for hour)", additional time off, or in some cases both.
5. XXX's lack of a "stand-by" pay policy to compensate in some way for time the employee must be close by for quick response, is not consistent with the predominant practice among its peers.
6. XXX does not adjust earnings in consideration of different annual schedules worked in various departments. This practice is consistent with about 50% of the peer organizations. In Archer's experience, this is a potential equity issue around which each employer has to make the decision that they believe is right for their organization
7. Only one peer indicated using an "HDHP with MERP" health plan type. All other peers use a PPO Plan Type, and in the case of four peers, offer both PPO and CDHP/HDHP plan choices.

The picture of truly understanding the competitiveness of the Town's health plan requires looking at employer costs, and all elements of employee costs (including premium costs, deductibles, out-of-pocket maximums, and coinsurance and copays).

Only one peer reporting an "HDHP with MERP" health plan leaves us unable to understand the employer and employee cost competitiveness among peers with a comparable health plan for employees.

- A. We recommend the Town engages with their health insurance broker to obtain a deeper understanding of the competitiveness of the health insurance plan as *we are aware there is concern, despite the generosity of the plan design, that family premium contributions are difficult for a number of employees to afford. We also note that with the adjustments we are recommending to the pay structure and to a number of Town employees' actual salaries, this picture may change to a certain degree.*
8. XXX does not pay for the premium for Employee Only Dental Coverage and Short Term Disability Insurance, whereas about two thirds of the peer organizations do pay for the premiums for these two offerings. XXX, does, however, pay employee only premiums for both vision insurance and long-term disability where 26% and 42% respectively of peer organizations do not.
9. XXX's named holidays practice is consistent with the peer organizations. The one item of note is that while about half the peers provide New Year's Eve as a paid holiday; and the other half do not (including XXX itself).
10. XXX's EMPLOYER contribution to the 401(k) plan, at 3.0% (5.0% for Law Enforcement) is below the virtually consistent practice of 5.0% (with one exception)

Conclusion: while there are some distinct competitive components among the benefits program at XXX, there are a few potential areas of improvement to meet the Town's objective of offering competitive Total Compensation. These decisions are weighty, particularly in looking at all elements of Total Compensation (direct pay and benefits) and involve in-depth comparisons of the Town's financial investments given different choice points under potential consideration. We *would* emphasize, in our experience, the benefits program at the Town of XXX is clearly employee-centered and shows a clear commitment to employee well-being.

C. Pay Plan Development

The Archer Company's approach to pay plan development seeks to find a balance between internal equity concerns (e.g., fairness across all positions in the organization) and external equity (i.e., establishing competitive pay ranges for all positions in the market). We accomplish this by utilizing regression analysis to align job evaluation data with the market data. Utilizing data derived from the market analysis and the job evaluation process, benchmark job average range midpoints were mathematically regressed against their corresponding job evaluation points for the purpose of establishing the organization's pay line.

Regression Analysis: While the goal is to use as much of the data gathered as possible, analysis determines whether or not specific organizations or benchmarks will be included in the regression calculations. To be included in the regression analysis, benchmark positions must meet three requirements:

- 1) A sufficient number of matches from responding jurisdictions
- 2) The definition of the benchmark has not changed significantly from the description

provided in the survey, and

- 3) The matches from an organization remain true to the intent of the benchmark description

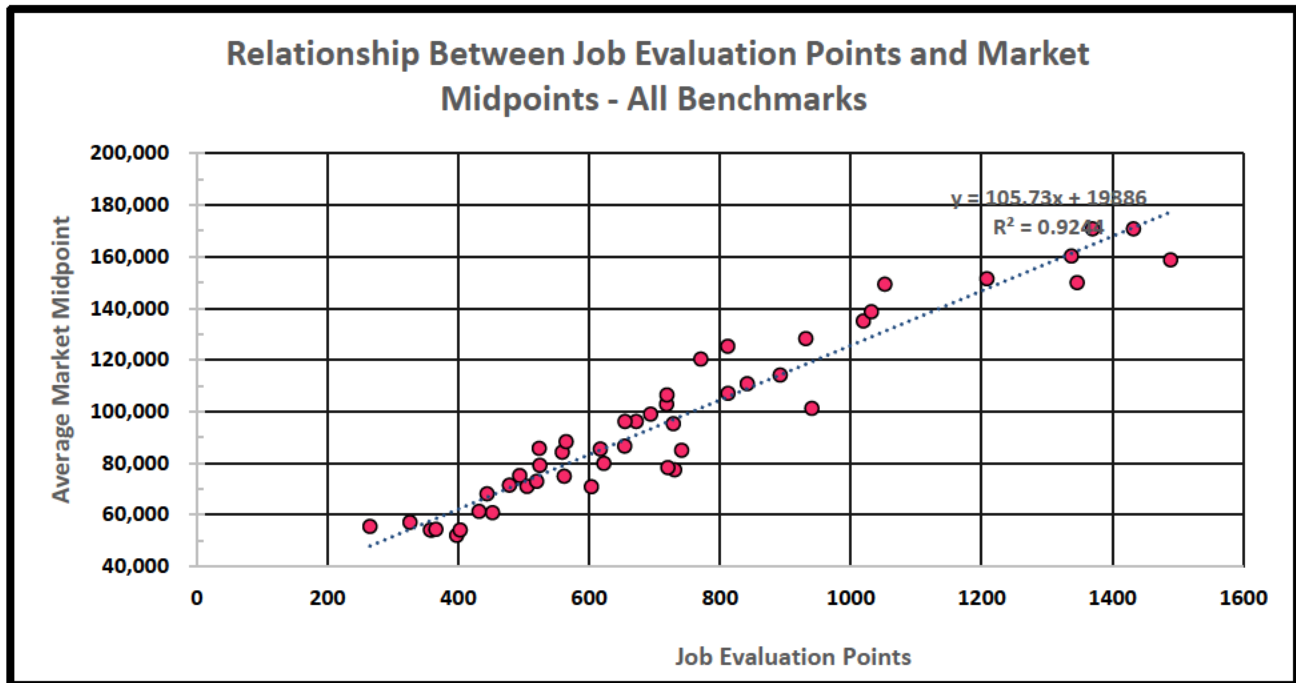
Next, each individual response is compared to the market average for the corresponding benchmark. Those responses that were significantly above or below the market average were again examined for validity and appropriateness for inclusion in the regression. In some cases, follow-up contacts were made to surveyed organizations to ensure the appropriateness of job matches. If it was concluded that a response was an *outlier*, the response was not included, and the market average was recalculated to reflect the shift in matching responses.

These benchmarks were examined carefully, and benchmarks where no clear average could be discerned were not used in the regression. In every case, care was taken to avoid making changes that artificially skewed the results (i.e., molding the market average by selectively discarding responses).

As part of our analysis, the Archer Company identified benchmark positions with a high residual between the predicted market and the survey responses (i.e., the market data appeared to be out-of-line with the Archer Company's initial job evaluation). The Archer Company re-examined these benchmarks to ensure that the job was evaluated correctly.

After thorough analysis of the survey data, we determined a pay line using regression analysis to identify the relationship between the market averages and corresponding evaluation points for each benchmark.

Statistical Results: A "line of best fit" – the pay line – is drawn from the regression analysis, and that line becomes the market rate (translated into grade "control points) for the proposed salary ranges for Town. When displayed graphically (see the graph below), the line does not pass through, or touch, all points, but rather minimizes the *overall* distance from the points to the line. The goal is to ensure that the linear regression provides a "good fit" for the benchmark positions.



A good fit—measured statistically using correlation and standards of error calculations—is one in which the change in salary from one grade to the next can be explained by a corresponding change in the number of evaluation points assigned to those positions. Not all of this variance may be explained; therefore, some points will be above and below the line.

This relationship is typically measured by the coefficient of determination as well as the coefficient correlation. The regression statistics displayed in the charts above show a very high degree of relationship between job evaluation points and market pay. *Practically speaking, this means that the job evaluation points assigned to Town jobs by the Archer Point Factor Job Evaluation System are an excellent predictor of the worth of the job in the outside market. In that way, we are confident that the new pay ranges built on the new pay lines will effectively balance internal equity and market equity.*

In this regression analysis, the coefficient of determination is .92 – a good fit between internal value and market value.

The pay grades and ranges are built around the pay line (line of best fit, above) such that the *new Pay Range “Market Reference Points” for each grade are close to the average Range Midpoint found in the market for the jobs assigned to any particular grade.*

Proposed Pay Structures, Pay Grades and Pay Ranges

We received significant input that the Town has been dealing with exceptional difficulty recruiting and retaining commissioned/sworn Public Safety roles in the last few years. We are also aware from our consulting practice that the greater Raleigh-Durham metropolitan area and the cities/towns from these metropolitan areas are experiencing a volatile labor market for Public Safety roles. Many of the peers we contacted are conducting pay studies, or just completed one, for example. Because of the relative volatility of the Public Safety labor market and the recruitment and retention issues documented by the Town a decision

was made to create a *separate pay structure* for Public Safety commissioned/sworn roles, called the “Public Safety” pay structure.

The assignment of jobs to pay grades based on job evaluation results and the use of market data to create the pay ranges is the same both the “General” and “Public Safety” structures. The job evaluation points assigned to each numerical grade is the same under both plans. However the “Public Safety” pay ranges are place an average of 4% above those of the “General” pay structure, at the Range Midpoints. We endorse a slightly higher pay structure given the current situation faced by the Town for these essential positions. We also recommend the Town monitor whether a separate structure is needed in future years, as market conditions inevitably change over time.

The proposed pay structures consists of grouping jobs into pay grades based on similarity in evaluation points (internal equity) and market pay levels. Theoretically, each job could be assigned to its own pay grade and pay range. The disadvantage of this approach is that it could require adjusting the pay grade assignment and pay range for a job up or down for relatively small changes in job duties and responsibilities. So, we use the approach employed in this study as a reasonable and sustainable methodology for pay structure design and administration.

Key Pay Structure Elements:

- Each Town job is placed in the pay grade within the assigned structure along with jobs of similar internal value (measured by our job evaluation system) and similar market value
- Each pay grade has been assigned an “open range” with a defined Minimum, Midpoint, and Maximum
- Each pay range is 56% wide from Minimum to Maximum
- The ranges associated with each pay grade are designed to be competitive for all jobs within a given pay grade (assuming the Town does adjust the structures based on the market every 1-3 years, and ideally, no less often)

The “General” and “Public Safety” pay structures with details on the structure elements, are presented in **Exhibit 3** and **Exhibit 4**, respectively.

Pay Range Width: The pay range widths of 56% are competitive in the market. It will be important that the structure itself be adjusted every year or two at the most, based on then-current market information on pay structure increase trends.

The administration of an employee’s pay through their pay grade range is a very important compensation policy decision for any organization.

As stated, all jobs subject to Town’s pay plan have been assigned pay grades based on their job evaluation points (internal worth). The assignment of each job to a Classification Title, with the commensurate assigned pay grade and FLSA classification, are shown in several exhibits

Exhibit 5 General Pay Structure Pay Grade List

Exhibit 6 General Pay Structure Classification Title List

Exhibit 7 Public Safety Pay Structure Pay Grade List

Exhibit 8 Public Safety Pay Structure Classification Title List

Exhibit 9 Cross-Reference List of Current to New Job Title, Grade and FLSA designation (both structures)

Exhibit 10 shows the relationship between the new range Midpoints and the average Market Grade Midpoint for each of the surveyed (benchmarked) jobs. This exhibit shows that the new ranges will be competitive in the market in which the Town competes for its employees, with the average variance between range Midpoint and market Midpoint at 1% above market. The 1% variance is true for both jobs in the “General” as well s the “Public Safety” structures.

III. IMPLEMENTATION OF THE RECOMMENDED PAY PLAN

The Archer Company recommends the Town approves and implements the pay plan recommendations associated with this study, as soon as administratively and financially feasible. Current pay ranges in most cases are simply not competitive, and we believe without the recommended adjustments implemented over the next 1-2 years, the Town will experience increasingly significant recruitment and retention issues.

To that end, we discussed a number of plan implementation options with the Project Team, based on successful models we have employed in similar municipalities and our understanding of the Town's objectives and compensation philosophy.

The Project Team chose, and we endorse a recommended implementation plan. The assumption in calculating estimated implementation costs is full implementation on 7/1/25, the first day of the next fiscal year.

Implementation Steps – July 1, 2025:

1. Provide a 5.0% across-the-board (ATB) increase to all employees covered by the Plan. This accounts for a cost of living adjustment and allows the Town to maintain its position in the labor market in which it competes.
2. If an employee is still below their range minimum after the 5% ATB increase, their salary is automatically moved to range minimum.
3. Each employee is placed into their new grade and range based on years of service in their current job title. In that way, the longer an employee has been in their job, ideally, the higher the pay, compared to employees in the same job with less tenure. If any employee's current salary at implementation date exceeds the Target Placement Salary value, the employee receives no implementation adjustment.

The range placement, or "target salary" is based upon **Table 4** below, linking completed years of service to the target salary:

Table 4: Implementation Target Placement

Base Salary Target Placement:	
<u>Completed Years of Service in Current Position</u>	<u>Target Placement/Target Salary</u>
< 1	Grade Minimum
≥ 1 < 2	Min + 3%
≥ 2 < 3	Min. + 6%
≥ 3 < 4	Min. + 9%
≥ 4 < 5	Min. + 12%
≥ 5 < 6	Min. + 15%
≥ 6 < 7	Min. + 18%
≥ 7 < 9	Min. + 21%
≥ 9 < 10	Min + 24%
≥ 10 +	Grade Midpoint

Because this option takes into consideration equitable placement based on length of time in the current job, this option seeks to minimize pay compression. Also, because each employee receives an across-the-board increase, whether or not they also receive a Years of Service-based salary adjustment, the Town is providing a competitive pay adjustment to all employees which will allow the Town to maintain its position in the labor market in which it competes.

The adjustments based on time in position are a *one-time pay adjustment*, for implementation only, to minimize pay compression. In future years, salary increases will be subject to the Town's compensation administration guidelines.

While the recommended implementation plan is not a perfect solution, there will be significant compression mitigation that occurs.

The Archer Company has provided the Town's Project Team with detailed implementation cost estimates in a flexible Excel calculator format, so that implementation costs can be modeled under different implementation scenarios.

The estimated costs for the recommended implementation plan are summarized as follows:

- 77 employees' salaries will be moved to the Range Minimum for their new assigned pay grade and range
- 84 Town employees will also receive an increase based on the target salary calculated for their individual circumstances. In these cases, the employees' salaries are adjusted upward to reflect the "Time-In-Position" chart in Table 4 above

- The recommended implementation plan will cost approximately **\$1.62M** in base payroll expenses
- This expense represents an approximate **12.8%** increase to the base payroll for this group of 184 Town employees

IV. OTHER REPORTS AND RECOMMENDATIONS

Along with the basic implementation recommendations described in the last section, The Archer Company has a few other compensation plan recommendations for Town's consideration:

1. Consider our recommendations for revisions to the Town's Compensation Philosophy (presented in **Exhibit 11**).
2. Consider our recommendations for additional language as well as enhancements to the Town's current compensation policies (**presented in Exhibit 12**).
3. Consider our recommendations and create a more formal program for the administration of Job Progression Plans (**presented in Exhibit 13**).
4. Consider the following steps to ensure the Classification and Compensation Plan is maintained optimally, over time:

Ongoing maintenance of the assignment of jobs to pay grades and the adjustment of pay ranges as the competitive job market changes will ensure the viability of this plan as a long-term solution to Town's compensation needs. The key elements of effective compensation administration and maintaining the integrity of a compensation plan over time are relatively simple:

One. As new jobs are added or as existing jobs change, a comprehensive job analysis and evaluation should be performed to accurately measure the value of the job to Town similar to the process used to develop the original pay plan. The results of the evaluation process will determine the proper pay grade placement and pay range for these jobs.

We urge Town to be consistent in the application of this process, to maintain the integrity of the pay plan and accuracy of the pay grades themselves over time.

The Archer Company will provide individual evaluations of new and/or changed jobs *for no charge* until March 2026. Our current engagement includes training the HR Team on the use of our trademarked job evaluation system, enabling the Town to evaluate and pay grade new jobs independently in the future.

Two. Commit to a comprehensive market study and adjustment of the pay ranges every 3-4 years. At that time, the market data can be integrated with job evaluation scores once again to determine if adjustments to one or both pay structures are needed to continue to maintain a plan that in fact integrates internal and market worth.

Three. In the interim years, we recommend that the Town gather market data on pay structure increases from sources such as The Archer Company, World at

Work, Mercer and/or by querying the peer organizations, and use that market data to determine 1. If a structure adjustment is merited to remain competitive and 2. The amount of the structure adjustment.

We recommend the analysis be completed annually, though the Town may choose to adjust structures every 1, 2 or even 3 years and depending on what is occurring with the external market, should be able to remain competitive in its two pay structures.

In general, we recommend that in any year in which the pay structure is adjusted, the pay structure adjustment amount should lag the percentage applied to individual salaries by 1-2 percentage points, so that employees are actually moving through the pay ranges at an acceptable base, over time.

The Archer Company provides guidance to our clients each year on recommended pay structure movement.

- Four.** Formalize a policy and process for the determination the (generally) *annual increase amount for individual employee pay increases*. Market data and trends on pay increases for the current year and next year can be gathered from several large survey houses, from The Archer Company, in our annual guidance report to clients, and/or from querying this information from the chosen peer organizations.

Understanding the market trends among competitors will help Town determine the best way to utilize limited salary increase funds.

- Five.** Strategically and proactively advertise the total compensation package: direct pay and benefits. As a specific example, the provision of a defined benefits retirement plan is almost unheard of in the private sector, and if “marketed” correctly, should be an attraction to good candidates from the private sector. Candidates accept and reject offers of employment and also make the decision to even apply for a variety of reasons, but we know with certainty that those organizations that deliberately advertise their total compensation package increase their pool of qualified candidates. Similarly, by communicating the total investment made by the Town to *current* employees, the Town is arming the employees with valuable and important data to consider if they are considering moving to a different organization.

There are a number of firms that will work with Town to publish annual “Total Compensation” statements, calculating all costs incurred by Town on behalf of the employee for all components of direct compensation as well as indirect compensation (benefits costs). Total Compensation Statements are powerful communication vehicles to employee groups.

We would like to thank the Town of XXX Project Team for their partnership in completing this project.

Exhibit 1: Market Summary – Benchmark Position Survey

TOWN OF XXX, NORTH CAROLINA

Pay Range Competitiveness Report - 2024 Market Assessment

Compiled by the Archer Company

12/4/2024

Updated: 1/2/25

	Town rate is more than 20% below the Market Mean value
	Town rate is more than 10% below the Market Mean value
	Town rate is more than 10% above the Market Mean value

- Indexes (columns E, I and M) within a range of -10% to 10% are considered within a "competitive range"

Overall: -13% -14% -15%												
Job Title	PAY RANGE MINIMUM				PAY RANGE MIDPOINT				PAY RANGE MAXIMUM			
	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean	Number of Responses
Administrative Assistant	\$43,559	\$42,044	4%	20	\$55,524	\$54,065	3%	20	\$67,490	\$66,643	1%	20
Battalion Chief	\$61,291	\$84,077	-27%	12	\$78,128	\$108,657	-28%	12	\$94,965	\$134,107	-29%	12
Building Maintenance Specialist	\$43,559	\$47,818	-9%	18	\$55,524	\$61,283	-9%	18	\$67,490	\$75,309	-10%	18
Capital Projects Manager	\$67,574	\$80,387	-16%	16	\$86,136	\$103,951	-17%	16	\$104,699	\$128,111	-18%	16
Chief Race & Equity Officer	\$110,070	\$98,163	12%	7	\$140,307	\$128,189	9%	7	\$170,543	\$158,215	8%	7
Chief Sustainability Officer	\$110,070	\$87,208	26%	11	\$140,307	\$113,502	24%	11	\$170,543	\$141,102	21%	11
Code Enforcement Officer 1	\$45,737	\$52,981	-14%	18	\$58,300	\$68,081	-14%	18	\$70,864	\$83,959	-16%	18
Code Enforcement Supervisor	\$70,952	\$73,244	-3%	12	\$90,443	\$84,943	6%	12	\$109,934	\$115,899	-5%	12
Communications & Engagement Director	\$90,555	\$103,433	-12%	16	\$115,431	\$138,663	-17%	17	\$140,306	\$173,396	-19%	16
Communications & Engagement Specialist	\$48,023	\$58,206	-17%	18	\$61,215	\$74,947	-18%	18	\$74,407	\$92,483	-20%	18

TOWN OF XXX, NORTH CAROLINA

Pay Range Competitiveness Report - 2024 Market Assessment

Compiled by the Archer Company

12/4/2024

Updated: 1/2/25

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	Town rate is more than 10% below the Market Mean value
	Town rate is more than 10% above the Market Mean value

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Overall: -13% -14% -15%												
Job Title	PAY RANGE MINIMUM				PAY RANGE MIDPOINT				PAY RANGE MAXIMUM			
	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean	Number of Responses
Deputy Fire Chief	\$78,225	\$101,446	-23%	13	\$99,713	\$135,021	-26%	13	\$121,202	\$169,987	-29%	13
Deputy Planning Director	\$78,225	\$92,065	-15%	10	\$99,713	\$123,373	-19%	10	\$121,202	\$155,104	-22%	10
Economic Development Director	\$90,555	\$112,218	-19%	12	\$115,431	\$149,330	-23%	13	\$140,306	\$188,162	-25%	12
Engineer 1	\$58,373	\$68,549	-15%	9	\$74,408	\$86,543	-14%	9	\$90,443	\$105,732	-14%	9
Engineering Inspector	\$55,593	\$60,783	-9%	17	\$70,864	\$77,996	-9%	17	\$86,136	\$95,927	-10%	17
Environmental Planner	\$61,291	\$68,145	-10%	6	\$78,128	\$88,296	-12%	6	\$94,965	\$109,075	-13%	6
Finance Director	\$99,837	\$121,563	-18%	19	\$127,262	\$160,226	-21%	21	\$154,688	\$198,639	-22%	19
Fire Captain	\$55,593	\$73,369	-24%	14	\$70,864	\$94,126	-25%	14	\$86,136	\$115,843	-26%	14
Fire Chief	\$99,837	\$127,487	-22%	12	\$127,262	\$170,741	-25%	14	\$154,688	\$210,812	-27%	12
Fire Driver Operator	\$50,425	\$61,553	-18%	14	\$64,276	\$78,985	-19%	14	\$78,128	\$97,210	-20%	14

TOWN OF XXX, NORTH CAROLINA

Pay Range Competitiveness Report - 2024 Market Assessment

Compiled by the Archer Company

12/4/2024

Updated: 1/2/25

	Town rate is more than 20% below the Market Mean value
	Town rate is more than 10% below the Market Mean value
	Town rate is more than 10% above the Market Mean value

- Indexes (columns E, I and M) within a range of -10% to 10% are considered within a "competitive range"

Overall: -13% -14% -15%												
Job Title	PAY RANGE MINIMUM				PAY RANGE MIDPOINT				PAY RANGE MAXIMUM			
	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean	Number of Responses
Fire Marshal	\$67,574	\$82,412	-18%	13	\$86,136	\$106,409	-19%	13	\$104,699	\$131,617	-20%	13
Firefighter/Relief Driver	\$43,559	\$55,867	-22%	13	\$55,524	\$72,075	-23%	13	\$67,490	\$89,087	-24%	13
GIS Administrator	\$64,356	\$79,982	-20%	12	\$82,034	\$102,786	-20%	12	\$99,713	\$125,999	-21%	12
GIS Technician	\$48,023	\$55,568	-14%	14	\$61,215	\$71,400	-14%	14	\$74,407	\$88,094	-16%	14
Human Resources Analyst	\$58,373	\$66,578	-12%	17	\$74,408	\$85,667	-13%	17	\$90,443	\$105,790	-15%	17
Human Resources Director	\$95,083	\$114,893	-17%	20	\$121,202	\$151,445	-20%	21	\$147,322	\$189,445	-22%	20
IT Operations Manager	\$67,574	\$93,237	-28%	15	\$86,136	\$120,261	-28%	15	\$104,699	\$148,252	-29%	15
IT Systems Administrator	\$64,356	\$77,365	-17%	19	\$82,034	\$98,942	-17%	19	\$99,713	\$121,691	-18%	19
Maintenance/Construction Worker 1	\$35,836	\$40,338	-11%	19	\$45,679	\$51,982	-12%	19	\$55,525	\$64,147	-13%	19
Payroll & Benefits Coordinator	\$52,946	\$55,351	-4%	19	\$67,490	\$70,883	-5%	19	\$82,034	\$87,211	-6%	19

TOWN OF XXX, NORTH CAROLINA

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12/4/2024

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Overall: -13% -14% -15%												
Job Title	PAY RANGE MINIMUM				PAY RANGE MIDPOINT				PAY RANGE MAXIMUM			
	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean	Number of Responses
Permit Technician	\$39,510	\$44,491	-11%	19	\$50,362	\$57,035	-12%	19	\$61,215	\$70,212	-13%	19
Planner	\$58,373	\$61,713	-5%	19	\$74,408	\$79,150	-6%	19	\$90,443	\$97,409	-7%	19
Planning Administrator	\$74,500	\$88,723	-16%	10	\$94,965	\$114,125	-17%	10	\$115,430	\$140,259	-18%	10
Planning Director	\$99,837	\$113,080	-12%	18	\$127,262	\$149,883	-15%	19	\$154,688	\$186,807	-17%	18
Police Chief	\$104,829	\$126,103	-17%	17	\$133,625	\$170,716	-22%	19	\$162,422	\$206,010	-21%	17
Police Lieutenant	\$67,574	\$83,088	-19%	18	\$86,136	\$104,345	-17%	18	\$104,699	\$126,995	-18%	18
Police Officer 1	\$52,946	\$59,241	-11%	19	\$67,490	\$74,287	-9%	19	\$82,034	\$90,337	-9%	19
Police Sergeant	\$61,291	\$75,021	-18%	19	\$78,128	\$94,532	-17%	19	\$94,965	\$115,131	-18%	19
Procurement Coordinator	\$61,291	\$65,063	-6%	15	\$78,128	\$84,170	-7%	15	\$94,965	\$103,682	-8%	15
Program Support Assistant 1	\$32,504	\$44,122	-26%	6	\$41,433	\$55,410	-25%	6	\$50,362	\$67,576	-25%	6

TOWN OF XXX, NORTH CAROLINA

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Overall: -13% -14% -15%												
Job Title	PAY RANGE MINIMUM				PAY RANGE MIDPOINT				PAY RANGE MAXIMUM			
	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean	Number of Responses	Current	Market Mean	% Difference from Market Mean	Number of Responses
Public Works Director	\$104,829	\$118,889	-12%	16	\$133,625	\$158,713	-16%	18	\$162,422	\$194,999	-17%	16
Recreation Administrator	\$64,356	\$83,896	-23%	16	\$82,034	\$110,741	-26%	16	\$99,713	\$138,613	-28%	16
Recreation Supervisor	\$50,425	\$55,584	-9%	17	\$64,276	\$70,771	-9%	17	\$78,128	\$86,927	-10%	17
Solid Waste Equipment Operator 1	\$34,129	\$42,268	-19%	12	\$43,504	\$54,284	-20%	12	\$52,880	\$66,802	-21%	12
Solid Waste Equipment Operator 3	\$41,484	\$47,460	-13%	14	\$52,880	\$60,741	-13%	14	\$64,276	\$74,772	-14%	14
Solid Waste Supervisor	\$58,373	\$60,168	-3%	15	\$74,408	\$77,348	-4%	15	\$90,443	\$95,063	-5%	15
Stormwater Utility Manager	\$70,952	\$78,255	-9%	14	\$90,443	\$101,242	-11%	14	\$109,934	\$125,062	-12%	14
Streets & Grounds Supervisor	\$58,373	\$61,000	-4%	18	\$74,408	\$78,207	-5%	18	\$90,443	\$96,290	-6%	18
Transportation Planner	\$61,291	\$67,771	-10%	8	\$78,128	\$85,399	-9%	8	\$94,965	\$103,488	-8%	8

Exhibit 2:

Pay Practices and Select Benefits Custom Survey Report

Town of XXX Survey of Select Pay Practices and Benefit Programs & Provisions

Market Report

1/23/2025

General Observations and Findings:

1. In most areas, the Town of XXX's pay practices as well as benefit programs and provisions that were the subject of this market study are competitive with the market.
2. There are a few areas where the Town's program or provision is **"above" the general market practice**, or more generous. These are:
 - a. XXX's vacation, sick and personal days programs are competitive. However, particularly with a generous personal day program, the overall comparison places XXX in a very favorable position in the market, among its identified peers.
 - b. XXX's total paid time off which we are defining as vacation, sick, personal days, floating holidays and named holidays is above market by 1-3 days, depending on how it is counted.
 - c. In terms of "Other Benefits" queried, XXX's benefits for Paid Caregiver Leave and Sabbatical Leave are present only among a small number of peers, and so should be considered positively in terms of The Town's "Total Compensation" package.
3. There are some specific areas where XXX's practice or program is **not consistent with the prevalent market practice**. These are:
 - a. Although there are several peers that do not adjust their pay structures on a scheduled basis, e.g. every year or every other year, most peer organizations to adjust their pay structures annually. XXX does not have a defined period for considering pay structure adjustments.
 - b. Whereas the Town of XXX does not use defined data sources for determining pay structure adjustments, the majority of peers use one or more of the following data sources to make their pay structure decisions: Consumer Price Index, Employer Cost Index, WorldatWork Work or other major survey or consulting firm
 - c. The majority of peers (all but one) use "performance" as one of the criteria to inform employee pay increases. XXX's practice of excluding "performance" from the pay increase decision process is not consistent with the prevalent market practice.

Town of XXX Survey of Select Pay Practices and Benefit Programs & Provisions

Market Report

1/23/2025

- d. XXX's practice of no additional "benefit" for hours beyond the normal workweek for "exempt" employees is not consistent with the predominant market practice, which is to provide some type of recognition or remuneration for these hours. These provisions tend to take the form of "comp time (hour for hour)", additional time off, or in some cases both.
- e. XXX's lack of a "stand-by" pay policy to compensate in some way for time the employee must be close by for quick response, is not consistent with the predominant practice among its peers.
- f. XXX does not adjust earnings in consideration of different annual schedules worked in various departments. This practice is consistent with about 50% of the peer organizations. In Archer's experience, this is a potential equity issue around which each employer has to make the decision that they believe is right for their organization
- g. Only one peer indicated using an "HDHP with MERP" health plan type. All other peers use a PPO Plan Type, and in the case of four peers, offer both PPO and CDHP/HDHP plan choices.
- h. The picture of truly understanding the competitiveness of the Town's health plan requires looking at employer costs, and all elements of employee costs (including premium costs, deductibles, out-of-pocket maximums, and coinsurance and copays).
- i. Only one peer reporting an "HDHP with MERP" health plan leaves us unable to understand the employer and employee cost competitiveness among peers with a comparable health plan for employees.
- j. XXX does not pay for the premium for Employee Only Dental Coverage and Short Term Disability Insurance, whereas about two thirds of the peer organizations do pay for the premiums for these two offerings.
- k. XXX's named holidays practice is consistent with the peer organizations. The one item of note is that while about half the peers provide New Year's Eve as a paid holiday; and the other half do not (including XXX itself).
- l. XXX's EMPLOYER contribution to the 401(k) plan, at 3.0% (5.0% for Law Enforcement) is below the virtually consistent practice of 5.0% (with one exception).

Table 1. Organization Information

Number of employees; budget

Peer	# of Full Time Employees	# of Part Time/Seasonal Employees	Annual Operating Budget (in Millions)	Notes
Chatham County	649	589	\$278.00	GF - \$194 million All Funds - \$278 million
City of Asheboro	391	87	Not provided	
City of Burlington	649	506	\$85.10	
City of Durham	2426	278	\$667.80	
City of Graham	144	84	\$32.90	
City of Mebane				
City of Sanford	389	21	\$95.10	
Orange County	1033	369	\$279.40	
OWASA	136			
Town of Cary	1328		\$380.70	
Town of Chapel Hill	731	260	\$156.90	
Town of Clayton	300	50	\$132.50	General fund \$53,505,355 Electric \$19,514,000 Water/Sewer \$59,511,850
Town of Fuquay-Varina	381	98	\$73.70	
Town of Garner	221	99	\$74.60	
Town of Hillsborough	110	116	\$34.80	
Town of Holly Springs	422	141	\$104.30	
Town of Morrisville	246	100	\$59.50	
Town of Pittsboro	47	2		
Town of Wake Forest	430	89	\$72.20	
Town of XXX	182	87.5	\$32.60	
Market Average	557	181	\$168.50	
XXX as a Percent of Market Average	33%	48%	19%	

Data Effective Date: 11/18/2024

Notes:

XXX is on the smaller end of all comparative measures typically used to determine peers including employee count and operating budget. However these jurisdictions are clearly "talent competitors" for a number of XXX positions due to the similarity in functions between the peers themselves. Recruitment and retention/turnover patterns reinforce the relevance of these peers in measuring market competitiveness.

Table 2. Pay Structure

Please choose the answer below that best describes your pay structure ?

Peer	Steps	Open Ranges	Steps for Lower Half & Ranges for Upper Half	Other
Chatham County		X		
City of Asheboro		X		
City of Burlington		X		
City of Durham	X	X		
City of Graham		X		
City of Mebane		X		
City of Sanford		X		
Orange County	X	X		
OWASA		X		
Town of Cary	X			
Town of Chapel Hill		X		
Town of Clayton	X			
Town of Fuquay-Varina		X		
Town of Garner		X		
Town of Hillsborough		X		
Town of Holly Springs		X		
Town of Morrisville		X		
Town of Pittsboro		X		
Town of Wake Forest		X		
Number:	4	17	0	0
Town of XXX		X		

Data Effective Date: 11/18/2024

Notes:

XXX's use of open ranges, as opposed to using defined steps within each pay grade and range is consistent with the strong predominant practice found among the peer organizations. In Archer Company's experience, the prevalence of step plans in the southeast region is still an atypical practice.

Table 3. Pay Structure Adjustment Frequency

How often do you adjust your pay structure?

Peer	Annually	Every Other Year	Every Third Year	No Schedule	Other
Chatham County	X				
City of Asheboro				X	
City of Burlington				X	
City of Durham	X				If budget permits
City of Graham				X	
City of Mebane	X				
City of Sanford	X				X - some previous years excluded adjustment of pay schedules
Orange County	X				
OWASA	X				X - Pay ranges move at the same amount as the cost of labor increase (COLA) - assuming COLA is approved with the budget.
Town of Cary	X				
Town of Chapel Hill				X	
Town of Clayton				X	
Town of Fuquay-Varina	X				
Town of Garner					X - annually to account for annual market adjustments and every 3rd year for pay & class study
Town of Hillsborough				X	
Town of Holly Springs	X				
Town of Morrisville				X	
Town of Pittsboro	X				
Town of Wake Forest	X				
Number:	10	0	0	7	
Town of XXX				X	X - no regular schedule/depends on budget

Data Effective Date: 11/18/2024

Notes:

The majority of peer organizations report adjusting their pay structures annually. A sizeable minority (7) do not have a defined period for pay structure adjustments; such is the case at XXX.

Table 4. Pay Structure Adjustment - Data Source

What index or data source does your organization use to determine the pay structure amount?

Peer	Consumer Price Index (CPI)	Employer Cost Index (ECI)	Same as COLA or Across-The-Board Increase	World at Work, Other Major Survey, or Compensation Consulting Firm	Other
Chatham County			X		X
City of Asheboro		X			
City of Burlington			X	X	
City of Durham				X	
City of Graham	X				
City of Mebane			X		X
City of Sanford	X				
Orange County	X				
OWASA				X	
Town of Cary	X				X
Town of Chapel Hill	X			X	X
Town of Clayton				X	
Town of Fuquay-Varina					X
Town of Garner	X				
Town of Hillsborough			X	X	
Town of Holly Springs	X				
Town of Morrisville					X
Town of Pittsboro	X		X		
Town of Wake Forest				X	
Number:	8	1	5	7	2
Town of XXX					X - None

Data Effective Date: 11/18/2024

Notes:

Two thirds of the peer organizations use at least one recognized data source as part of their decision-making in considering adjustments to their pay structure(s). The more commonly-used data sources are the Consumer Price Index (published by the Bureau of Labor Statistics quarterly) and survey data on pay structures, pay increases and other relevant data published by WorldatWork (Compensation Industry Professional Association) and other major survey houses in the Compensation Industry. About 1/3rd of the peers, as well as XXX, do not use one of the named, generally-recommended data source or sources to inform pay structure adjustments. Archer Company will make specific recommendations on this topic in our Final Report.

able 5. Starting Wage Above Minimum

Do you allow new employees to start at a wage or salary amount higher than the Salary Range Minimum? If yes, how is starting salary determined?

Peer	Yes	No	Salary Determination
Chatham County	X		Education & experience
City of Asheboro	X		Experience/Education
City of Burlington	X		Knowledge, Skills and Experience, Special Labor Market Skills.
City of Durham	X		Based on candidates experience in comparison with internal employees
City of Graham	X		Experience
City of Mebane	X		qualifications and evaluation of internal equity.
City of Sanford	X		knowledge, skills, and abilities
Orange County	X		education & experience levels
OWASA	X		OWASA has Pay Administration Guidelines that would be followed. Generally, candidates that meet minimum requirements for the position will start at or near the minimum of the pay range. When candidates exceeds the minimum requirements the starting salary will be determined by our guidelines.
Town of Cary	X		Experience, market, internal equity considerations
Town of Chapel Hill	X		Budget for the position and pay equity within department and across the Town at the same grade.
Town of Clayton	X		Years of experience and education
Town of Fuquay-Varina	X		Utilization of a salary spreadsheet that calculates years of experience in "same level" at 75% and "lower level" at 50%
Town of Garner	X		typically no higher than the range midpoint
Town of Hillsborough	X		It depends on the amount of education and related experience they have that is above the minimum qualifications for the position. Typically will offer \$1k for each year of experience, education, or certifications they have above the minimum requirements.
Town of Holly Springs	X		For any offer above the minimum of the pay rage, we determine a salary based on internal equity in that particular paygrade. Knowledge, skills and experience of the candidate as it relates to the position.
Town of Morrisville	X		Experience and internal equity
Town of Pittsboro	X		Education and experience
Town of Wake Forest	X		Budget approval & experience.
Number:	19	0	
Town of XXX	X		years of direct experience based on 20 years to max multiplier

Data Effective Date: 11/18/2024

Footnotes:

All peer organizations provide for the ability to hire new employees at a wage or salary higher than the defined Range Maximum. XXX's policy is in line with the prevalent practice in the market. A combination of education, experience, and internal equity considerations appear to be the predominant factors used by peers to determine pay for new hires.

XXX uses "direct experience", but may also want to integrate a formal analysis of education (beyond minimally-required) and an internal equity analysis to the Town's current practice in evaluating salaries for new hires.

Table 6. Pay for Performance/Merit Pay

8. Please pick the one response below that best describes the use of any type of "pay-for-performance" or "merit" plan

9. If some or all of the pay increase policy is based on performance, what is the merit increase percentage pool set aside for this fiscal year?

Peer	None	General Across-the-Board + Pay for Performance	Pay for Performance Only	Performance + Current Placement in Range	Other	Percentage Pool	Notes
Chatham County					X	N/A	
City of Asheboro		X					
City of Burlington		X				2.00%	
City of Durham				X		4.80%	
City of Graham					X	3.00%	Averaged: Tier 1 - 2% Tier 2 - 4%
City of Mebane				X		2.75%	
City of Sanford		X				0.00%	
Orange County		X					
OWASA					X		Employees receiving "Exceptional", "Exceeds Expectations" or "Meets Expectations" annual performance review ratings will be eligible for a merit increase and a COLA increase. The Schedule of Classification and Compensation pay-ranges shall increase by the same percentage as the COLA. Board approved merit increase percentages are provided based on the performance rating received. "Meets Expectations" = 1x Board approved merit increase; "Exceeds Expectations" = 1.5x merit increase amount; "Exceptional" = 2x merit increase amount, unless otherwise determined by the Board.
Town of Cary				X		5.00%	
Town of Chapel Hill	X						
Town of Clayton		X					
Town of Fuquay-Varina			X			3.00%	
Town of Garner			X			3.00%	
Town of Hillsborough		X				2.50%	
Town of Holly Springs				X		5.00%	
Town of Morrisville				X		4.50%	Averaged: 3% 4.5% 6%
Town of Pittsboro					X	2.00%	
Town of Wake Forest				X		3.50%	
Number:	1	6	2	5	4	Average:	3.16%
Town of XXX	X						

Data Effective Date: 11/18/2024

Footnotes:

All but one of XXX's peers utilize "performance" as one of the criteria to determine employee pay increases. About 1/3rd of the peers use a general increase and performance component in their pay increase program. Only 1 peer indicates there is no performance component in their pay increase program.

An average pool of 3.16% (of base salaries) was set aside for performance among the peer organizations responding to this question. Again, about one third of the peers apparently funded some amount of general increase on top of their merit increase program.

XXX's practice of employing a general pay increases with no performance component is not consistent with the prevalent practice among the peer organizations.

Table 7. Overtime Policy for Exempt Employees

10. Please check the answer that best describes your organization's "pay" policy for hours worked above the normal workweek for FLSA-exempt professional, supervisory, and managerial roles

Peer	None	Comp Time - 1 hour accrued for 1 hour worked	Comp Time - 1.5 hour accrued for 1 hour worked	Pay - 1 hour, additional pay for 1 hr. worked	Pay - 1.5 hr. additional pay for 1 hr. worked	Additional Vacation/Personal /PTO	Notes
Chatham County						X	
City of Asheboro		X					
City of Burlington		X				X	We offer a hybrid option of those selected above.
City of Durham						X	Directors can provide Management Leave
City of Graham		X				X	Up to 40 hours max of compensatory time for exempt employees.
City of Mebane	X						
City of Sanford	X						
Orange County	X		X		X		
OWASA						X	Exempt employees may take the compensatory time off on an hour for hour basis within the same pay period that the overtime was worked. Compensatory time may not be carried over or
Town of Cary	X						
Town of Chapel Hill		X					
Town of Clayton	X						
Town of Fuquay-Varina	X						
Town of Garner		X					
Town of Hillsborough						X	
Town of Holly Springs						X	provide compensatory time off at the rate of 1 hour for each hour worked above the standard workweek. Maximum exempt comp time accrual is 24 hours
Town of Morrisville						X	
Town of Pittsboro		X					
Town of Wake Forest						X	
Number:	6	6	1	0	1	8	
Town of XXX	X						

Data Effective Date: 11/18/2024

Footnotes:

Seventy-four percent (74%) of respondents provide some type of "benefit" for exempt employees who work beyond the normal work week. There are a wide variety of practices using among the peer organizations with about 57% providing additional time off (vacation, PTO or personal days) and one third of the peers providing "Comp Time" at 1 hour accrued for each hour worked. Several peers provide more than one "benefit" in these situations.

XXX's practice of no additional "benefit" for hours beyond the normal workweek for "exempt" employees is not consistent with the predominant market practice, which is to provide some type of recognition or remuneration for these hours. These provisions tend to take the form of "comp time (hour for hour)", additional time off, or in some cases both.

Table 8. Shift Differentials

If your organization offers shift differential pay for evenings, nights and/or weekends, please provide the following information

Peer	Offered?	Eligible Positions	Evening	Night	Weekend
Chatham County	No				
City of Asheboro	No				
City of Burlington	No				
City of Durham	Yes	non-exempt, excluding Police or Fire that work on a regular basis 4pm to 8am	\$1.50/hour	\$1.50/hour	\$1.50/hour
City of Graham	No				
City of Mebane	No				
City of Sanford	No				
Orange County	No				
OWASA	No				
Town of Cary	No				
Town of Chapel Hill	No				
Town of Clayton	No				
Town of Fuquay-Varina	No				
Town of Garner	No				
Town of Hillsborough	No				
Town of Holly Springs	No				
Town of Morrisville	No				
Town of Pittsboro	No				
Town of Wake Forest	No				
Number of "Yes" Responses:	1	0	0	0	0
Town of XXX	No				

Data Effective Date: 11/18/2024

Notes:

XXX does not provide a shift or weekend differential for employees who work evenings, nights and/or weekends. All but one peer also report they do not use shift or weekend differentials at this time. So, the Town's practice is consistent with the prevalent market practice.

Table 9. On Call/Stand by Pay

If your organization offers on-call or "stand-by" pay, please provide the following information

Peer	Offered?	Eligible Positions	Type of Remuneration	Amount if Hourly Rate	Notes
Chatham County	No				
City of Asheboro	Yes	Water/Sewer Dept.		Regular hourly rate until they work over 40 hours	
City of Burlington	Yes	Various - List of titles in footnotes	Day Rate		Regular Day: \$20.00; Weekend Day: \$30.00; Holiday Day: \$50.00
City of Durham	Yes	non-exempt positions	Various	overtime rate of pay	time can be paid out or added to comp time balance
City of Graham	Yes	Police and Utilities	Additional time off	.062 hrs. per 1 hr. stand by time	
City of Mebane	Yes	Public Utilities positions	daily amount	\$12 per day	with option for overtime if hours meet the requirement. They could also work a reduced schedule.
City of Sanford	Yes	generally distribution & collection Utility Maintenance Workers, Lead Workers, etc.	5 hours of work for each week on call, plus any actual hours worked while on call	OT rate	additional 2 hours of OT if service center closed due to holiday
Orange County	Yes	Deputies, Facilities Maintenance, DSS Caseworkers			
OWASA	Yes	Maintenance Staff, Utility Technicians, Crew Supervisors, and a few staff members that are responsible for after hour alerts and communications	regular hourly rate	12 hours of regular pay the week of the scheduled on-call duty	Employees not on-call but who are recalled, eligible for 4 hours of on-call pay
Town of Cary	Yes	Depends on operational and departmental needs			See policy on external website for details for on-call and callback - www.carync.gov/mayor-council/town-policies/wage-hour-policy-hours-of-work-overtime
Town of Chapel Hill	Yes	varies	on call pay	\$1.00 per hour	
Town of Clayton	No				
Town of Fuquay-Varini	Yes	Public Utilities, Public Works	Depending on type of call/emergency. Typically additional time off		If on-call, town gives 6hrs for the inconvenience and 2hr for a call out
Town of Garner	Yes	Police Investigations	Hourly rate no standard hours	\$25.00	Copy of Town Policy included in email to Amy Lee
Town of Hillsborough	Yes	non-exempt positions	The on-call daily stipend = the amount of compensation due for 1 hour of work at living wage	\$16.15	The current Orange County Living Wage rate
Town of Holly Springs	Yes	Department Designated	lump sum	\$20 per day	
Town of Morrisville	Yes	Public Works Maintenance Positions			Employees are paid for 2 additional hours during the on-call period
Town of Pittsboro	Yes	Public Works	overtime hourly rate		
Town of Wake Forest	Yes	Police, Electric, Public Buildings, Streets,	Time and a half	Time and a half	
Number of Yes:	17	0	0	0	
Town of XXX	No				

Data Effective Date: 11/18/2024

Footnotes:

1. City of Burlington - Aquatics Maintenance Technician, Building Services Technician, Building Services Supervisor, Parks Maintenance Assistant Supervisor, Plumber, Assistant Turf Manager, Turf Technician, Traffic Supervisor, Police Sergeant, Water Plant Lead Operator, Plant Maintenance Chief Technician, Police Telecommunicator II, Master Police Officer, Light Duty Mechanic, Senior Building Services Technician, Equipment Operator III (PW), Fire Captain Community Risk Reduction, Police Telecommunications Lead, W&S Utility Worker II, Water & Sewer Utility Worker I, Police Evidence Technician, PW Grounds Crew Leader, Heavy Duty Mechanic, Equipment Operator III (SW), Meter Operations Supervisor, Water Plant Lead Operator, Street Services Supervisor I, Building Inspector, HVAC Mechanic, Public Information Specialist, IT Support Specialist, Meter Services Specialist, Meter Reader, Police Officer II, Police Officer I, Pipe Maintenance Field Supervisor I, Pipe Maintenance Field Supervisor II, Police Technology Manager, Plant Maintenance Technician, Environmentalist Specialist, PW Grounds Crew Leader, Equipment Services Manager, Equipment Operator II (SW), Animal Services Operations Manager, Equipment Operator III (SW), Water Plant Operator I, Solid Waste Services Supervisor, Recreation Maintenance Worker II, Animal Services Veterinary Care Specialist, Water & Sewer Line Locator, Park Maintenance Crew Leader, Electrician, Street Services Supervisor I, Traffic Lead Technician, Grounds & Cemetery Assistant Superintendent, Animal Services Field Services Supervisor

Notes:

The provision of "stand-by" pay is a strong practice among XXX's peers. The type of payment and amount does vary considerably. These programs, in Archer Company's experience, are often used in Police, Public Works, Facilities Maintenance and Utilities positions. Generally these policies are accompanied by a minimum number of hours for which an employee is further compensated, if they are actually called in to work outside of normal work hours. The most common minimum we see is two (2) hours.

XXX's lack of a "stand-by" provision is not consistent with the predominant practice among its peers.

Table 10. Bilingual Pay

If your organization offers a bilingual pay program, please provide the following information

Peer	Offered?	Eligible Positions	Type of Remuneration	Languages Included	Proficiency Test Required	Notes
Chatham County	No					
City of Asheboro	Yes	Police, Water/Sewer	Lump sum per paycheck	All	Yes	Our Police Dept. has a company to verify the employee speaks proficient
City of Burlington	Yes	Police, Fire, Finance, HR and as approved by HR Director and City Manager	Bi-weekly Payment	Spanish	Yes	Berlitz Proficiency Testing
City of Durham	Yes	position identified by their Department Director	depends	Spanish	Yes	Can be oral and/or written or both
City of Graham	No					
City of Mebane	Yes	Those that interact on a regular basis with citizens-Police are being paid currently	3%	Spanish	Yes	verbal test
City of Sanford	Yes	all considered	annual premium - \$2,000 verbal, \$3,000 for verbal & written	currently Spanish only	Yes	depending on position responsibilities/needs, written &/or verbal test
Orange County	Yes	any	3% added to base	Spanish, Chinese		
OWASA	No					
Town of Cary	Yes	Depends on department	Use of second language is rewarded through a special award and amount varies depended on usage			
Town of Chapel Hill	Yes	Any	1500.00 annually/earn \$.72 hr. per competency	Multiples-i.e. Spanish, Karen	Yes	language competency
Town of Clayton	Yes	Any	\$50 per pay period	Spanish	No	
Town of Fuquay-Varina	Yes	Police Department is the only department at this time that uses the program.	Lump sum	Spanish, Arabic, French, German, Portuguese	Yes	We use Belitz Language program for testing-writing and speaking
Town of Garner	Yes	Police	Increase to hourly rate (2%)	Spanish	No	No official testing. We use other proficient personnel to evaluate
Town of Hillsborough	Yes	Law enforcement officers	increase to hourly rate	Spanish		
Town of Holly Springs	No					
Town of Morrisville	No					
Town of Pittsboro	No					
Town of Wake Forest	Yes	Police	Additional	Spanish		
Number of Yes:	13	0	0	0	0	
Town of XXX	Funded - Policy development in progress					

Data Effective Date: 11/18/2024

Notes:

Sixty-eight percent (68%) of XXX's peer organizations provide remuneration of employees who are required to use bilingual language skills in the performance of their jobs. The data do not suggest a prevalent remuneration amount or vehicle; this is consistent with Archer Company's experience in this area working with many jurisdictions. There is increased use of proficiency testing among cities and counties, etc. to ensure an acceptable level of language proficiency - as a requirement for bilingual "pay".

XXX's development of a Bilingual Pay Program will put the Town's practice consistent with the majority of peer communities.

Table 11. Compensation Practice for Different Annual Hours

Please choose the option that best describes your compensation practice for employees working different ANNUAL hours.

Peer	N/A	Employees are paid the same HOURLY RATE, but would receive DIFFERENT ANNUAL EARNINGS	Employees are paid the DIFFERENT HOURLY RATE, in order to receive the SAME ANNUAL EARNINGS	Other (specify:)	Other/Notes
Chatham County		X			
City of Asheboro				X	
City of Burlington	X				The above selections were made based on regular 2080 schedules. We do have alternate annual hours/accruals for Fire personnel working shift hours.
City of Durham		X			
City of Graham			X		
City of Mebane			X		
City of Sanford			X		
Orange County	X				
OWASA	X				
Town of Cary	X				
Town of Chapel Hill		X			
Town of Clayton				X	
Town of Fuquay-Varina			X		
Town of Garner	X				
Town of Hillsborough		X			
Town of Holly Springs	X				
Town of Morrisville			X		
Town of Pittsboro	X				
Town of Wake Forest			X		
Number:	7	4	6	2	
Town of XXX			X		

Data Effective Date: 11/18/2024

Notes:

Sixty-three percent (63%) of peers reported having employees working different annual hours schedules, presumably in different departments. In half of those cases employees working different annual hours would earn the same annual salary, meaning conceivably that employees in departments with fewer annual hours are working perhaps over 100 fewer annual hours (if they work 1950 hours versus 2080 hours - which we commonly see in local government) for the same annual pay. In one third of those organizations would adjust earnings to consider the difference in annual hours worked between different departments.

XXX does not adjust earnings in consideration of different annual schedules worked in various departments. This practice is consistent with about 50% of the peer organizations. In Archer's experience, this is a potential equity issue around which each employer has to make the decision that they believe is right for their organization.

Table 12. Time Off Accrual for Employees Working Different Hours
Please provide information about the accrual of time off for employees working different ANNUAL hours.

Peer	N/A	The amount of paid time off hours accrued are prorated for employees who work fewer than 2080 annual hours	The amount of paid time off hours accrued are NOT prorated for employees who work fewer than 2080 annual hours	The amount of paid time off hours accrued are based on "days" rather than hours, and therefore a "paid day" off relates to whatever the normal hours are that comprise an employee's typical workday	Other/Notes
Chatham County			X		
City of Asheboro			X		
City of Burlington	X				The above selections were made based on regular 2080 schedules. We do have alternate annual hours/accruals for Fire personnel working shift hours.
City of Durham		X			
City of Graham	X				
City of Mebane				X	
City of Sanford				X	only have different annual hours for fire
Orange County	X				
OWASA	X				
Town of Cary	X				
Town of Chapel Hill		X			
Town of Clayton				X	
Town of Fuquay-Varina		X			
Town of Garner	X				
Town of Hillsborough			X		
Town of Holly Springs	X				
Town of Morrisville		X		X	Morrisville has accruals based on the hours worked in the year. 1560, 2080, 2223 (Police Shift) and 2756 (Fire Shift).
Town of Pittsboro	X				
Town of Wake Forest				X	
Number:	8	4	3	5	
Town of XXX				X	

Data Effective Date: 11/18/2024

Notes:

Of the organizations that do have more than one annual hours schedule, 45% accrue time off by the "day", not by hour, so differences in annual work schedules are not part of the calculation. About 36% of the organizations do adjust time off for difference in annual work hours, and the remaining 27% do not adjust time off for differences in annual work hours. Like the topic of compensation adjustments for different annual work hours, the decision to adjust paid time off benefits for different annual work hours is a potential equity issue.

XXX's practice of accruing time off by the "day" is consistent with the largest segment of the peers that indeed have multiple annual hours schedules.

Table 13. Additional Compensation Programs

Do you provide any of the following compensation programs?

Peer	Recruitment Bonus	Retention Bonus	Employee Hiring Referral Bonus	Acting Status Pay (Temporary Promotion Pay)
Chatham County				
City of Asheboro				
City of Burlington			X	X
City of Durham	X		X	X
City of Graham				
City of Mebane		X		
City of Sanford	X			X
Orange County				X
OWASA			X	X
Town of Cary				
Town of Chapel Hill				X
Town of Clayton				X
Town of Fuquay-Varina	X	X		X
Town of Garner	X		X	X
Town of Hillsborough				X
Town of Holly Springs				X
Town of Morrisville				X
Town of Pittsboro				X
Town of Wake Forest				X
Number:	4	2	4	13
Town of XXX				X

Data Effective Date: 11/18/2024

Notes:

XXX's policy for "acting" pay is consistent with 68% of the peer organizations that also have such a policy.

While XXX does not offer programs for recruitment, retention or referral bonuses, these programs are present only in a small number of peer organizations at this time.

According to a 2023 Inventory of Pay Practices published by WorldatWork*, 82% of US employers are using a Sign-On Bonus Program, 81% have a Referral Bonus Program, and 67% offer a Retention Bonus. If XXX believes the Town is competing with general industry as well as public sector peers, including one or more of these bonus programs may be useful in recruitment and retention of employees.

*WorldatWork. **Total Rewards Inventory of Programs & Practices, September 2024.** Survey of compensation practices for over 1,100 US employers from multiple industries and different sizes.

Table 17. Type of Health Coverage Plans

Please indicate which of the following types of health insurance plans you offer to active employees:

Peer	HMO	PPO	CDHP/HDHP	HDHP + MERP
Chatham County		X		
City of Asheboro		X		
City of Burlington		X		
City of Durham		X		
City of Graham		X		
City of Mebane		X		
City of Sanford		X	X	
Orange County		X		
OWASA		X		
Town of Cary		X	X	
Town of Chapel Hill		X		
Town of Clayton		X		
Town of Fuquay-Varina		X		
Town of Garner		X		
Town of Hillsborough		X	X	
Town of Holly Springs		X		
Town of Morrisville		X		
Town of Pittsboro		X	X	
Town of Wake Forest	X			X
Number:	1	17	4	1
Town of XXX				X

see footnote

*Footnotes: Orange County - question not answered, but they provided data for PPO;
Town of Wake Forest - marked HMO, but provided data for HDHP + MERP*

Notes: Within the peer group, the use of an HDHP + MERP plan type is unique, with the exception of the Town of Wake Forest.

In the case of the 4 peers that do offer an HDHP plan, all of them also offer a PPO plan.

Table 18A. Health Plan Detail by Coverage Type - HMO

For each type of plan covered, please provide the following information:

Employee Only Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County							
City of Asheboro							
City of Burlington							
City of Durham							
City of Graham							
City of Mebane							
City of Sanford		There were no peers reporting use of an HMO plan					
Orange County							
OWASA							
Town of Cary							
Town of Chapel Hill							
Town of Clayton							
Town of Fuquay-Varina							
Town of Garner							
Town of Hillsborough							
Town of Holly Springs							
Town of Morrisville							
Town of Pittsboro							
Town of Wake Forest							
Town of XXX Market							
Average: XXX as % of Mkt							
Avg:							

Footnotes:

Table 18B. Health Plan Detail by Coverage Type - PPO

For each type of plan covered, please provide the following information:

Employee Only Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County	BCBS	\$1,051.41	\$0.00	\$1,051.41	100%	0%	\$4,000
City of Asheboro	CIGNA	\$750.00	\$0.00	\$750.00	100%	0%	\$5,000
City of Burlington	Aetna	\$830.41	\$0.00	\$830.41	100%	0%	\$2,000
City of Durham	Aetna	\$860.36	\$0.00	\$860.36	100%	0%	\$5,000
City of Graham	BCBS Base	\$803.39	\$0.00	\$803.39	100%	0%	\$6,500
	BCBS Buy Up	\$803.39	\$80.17	\$883.56	91%	9%	\$4,000
City of Mebane	United Healthcare	Not Provided	\$0.00	Not Provided	100%	0%	\$500
City of Sanford	BCBSNC	\$944.57	\$0.00	\$944.57	100%	0%	\$3,750
Orange County	Traditional	\$933.74	\$0.00	\$933.74	100%	0%	\$1,500
OWASA	BCBSNC	\$890.83	\$0.00	\$890.83	100%	0%	\$1,750
Town of Cary	BCBSNC	\$706.00	\$269.90	\$975.90	72%	28%	\$3,000
Town of Chapel Hill	Blue Cross NC	\$828.60	\$0.00	\$828.60	100%	0%	Not provided
Town of Clayton	BCBS	\$699.62	\$42.50	\$742.12	94%	6%	Not provided
Town of Fuquay-Varina	Cigna	\$761.55	\$0.00	\$761.55	100%	0%	\$4,000
Town of Garner	BCBSNC	\$890.00	\$0.00	\$890.00	100%	0%	\$2,250
Town of Hillsborough	BCBS NC	\$861.01	\$0.00	\$861.01	100%	0%	\$3,000
Town of Holly Springs	Blue Cross	\$700.00	\$0.00	\$700.00	100%	0%	\$5,000
Town of Morrisville	BCBSNC Base	\$823.08	\$0.00	\$823.08	100%	0%	\$5,000
	BCBSNC Buy-up	\$808.39	\$97.00	\$905.39	89%	11%	\$3,000
Town of Pittsboro	BCBS	\$720.16	\$0.00	\$720.16	100%	0%	\$1500/\$3000
Town of Wake Forest	BCBS	\$850.00	\$0.00	\$850.00	100%	0%	\$3,500
Town of XXX	N/A						
Market Average:		\$825.83	\$23.31	\$850.30	97%	3%	\$3,486
XXX as % of Mkt Avg: N/A							

Footnotes: City of Mebane did not provide employer contribution amount;

City of Sanford out of network deductible = \$6,000.00;

Town of Cary - Employee amount is standard, they also have a "reward rate" of \$68 per month

According to the **Employer Health Benefits 2024 Annual Survey, published by Kaiser Family Foundation**, the average monthly total premium for Single Coverage, is \$819 for small firms (199 or fewer workers). For State/Local Government employers only, the average is \$749.

The average EMPLOYEE CONTRIBUTION for PPO Single Coverage is 17% (across all industries).

Employee + Spouse Coverage:								
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)	Note
Chatham County	BCBS	\$1,559.05	\$410.54	\$1,969.59	79%	21%	\$4,000	
City of Asheboro	CIGNA	\$750.00	\$404.00	\$1,154.00	65%	35%	\$10,000	
City of Burlington	Aetna	\$830.41	N/A	N/A	N/A	N/A	\$4,000	Employee contribution varies
City of Durham	Aetna	\$1,262.00	\$181.92	\$1,443.92	87%	13%	\$10,000	
City of Graham	BCBS Base	\$803.39	\$803.39	\$1,606.78	50%	50%	\$13,000	
	BCBS Buy Up	\$803.39	\$963.74	\$1,767.13	45%	55%	\$8,000	
City of Mebane	United Healthcare	Not provided	\$412.94	Not provided	Not provided	Not provided	\$1,000	

City of Sanford	BCBSNC	\$944.57	\$563.74	\$1,508.31	63%	37%	\$7,500	
Orange County	Traditional	\$1,479.72	\$409.20	\$1,888.92	78%	22%	\$3,000	
OWASA	BCBSNC	\$1,200.49	\$309.50	\$1,509.99	80%	20%	\$3,500	
Town of Cary	BCBSNC	\$1,157.70	\$679.88	\$1,837.58	63%	37%	\$6,000	
Town of Chapel Hill	Blue Cross NC	\$1,350.21	\$521.61	\$1,871.82	72%	28%	Not provided	
Town of Clayton	BCBS	\$1,031.22	\$201.70	\$1,232.92	84%	16%	Not provided	Some employees pay 171.70
Town of Fuquay-Varina	Cigna	\$761.55	\$791.31	\$1,552.86	49%	51%	\$8,000	
Town of Garner	BCBSNC	\$1,230.00	\$650.00	\$1,880.00	65%	35%	\$4,500	
Town of Hillsborough	BCBS NC	\$852.02	\$697.10	\$1,549.12	55%	45%	\$6,000	
Town of Holly Springs	Blue Cross	\$1,050.00	\$550.00	\$1,600.00	66%	34%	\$10,000	
Town of Morrisville	BCBSNC Base	\$1,332.57	\$290.00	\$1,622.57	82%	18%	\$5,000	
	BCBSNC Buy-up	\$1,162.68	\$624.00	\$1,786.68	65%	35%	\$3,000	
Town of Pittsboro	BCBS	\$720.16	\$885.30	\$1,605.46	45%	55%	\$1500/\$3000	
Town of Wake Forest	BCBS	\$900.00	\$300.00	\$1,200.00	75%	25%	\$7,000	
Town of XXX	N/A							
Market Average:		\$1,059.06	\$532.49	\$1,609.88	67%	33%	\$6,306	
XXX as % of Mkt Avg:	N/A							

Footnotes: City of Mebane did not provide employer contribution amount;
City of Sandford out of network deductible = \$12,000
Town of Cary - Employee amount is standard, they also have a "reward rate" of \$1398 per month

Employee + Child Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County	BCBS	\$1,316.13	\$190.56	\$1,506.69	87%	13%	\$4,000
City of Asheboro	CIGNA	\$750.00	\$336.00	\$1,086.00	69%	31%	\$10,000
City of Burlington	Aetna	\$830.41	varies	Not provided	Not provided	Not provided	\$4,000
City of Durham	Aetna	\$1,253.00	\$102.29	\$1,355.29	92%	8%	\$10,000
City of Graham	BCBS Base	\$803.39	\$479.37	\$1,282.76	63%	37%	\$13,000
	BCBS Buy Up	\$803.39	\$610.77	\$1,414.16	57%	43%	\$8,000
City of Mebane	United Healthcare	Not provided	\$263.43	Not provided	Not provided	Not provided	\$1,000
City of Sanford	BCBSNC	\$944.57	\$340.43	\$1,285.00	74%	26%	\$7,500
Orange County	Traditional	\$1,237.10	\$229.90	\$1,467.00	84%	16%	\$3,000
OWASA	BCBS	\$989.29	\$98.44	\$1,087.73	91%	9%	\$3,500
Town of Cary	BCBSNC	\$1,123.48	\$548.06	\$1,671.54	67%	33%	\$6,000
Town of Chapel Hill	Blue Cross NC	\$1,187.39	\$358.79	\$1,546.18	77%	23%	Not provided
Town of Clayton	BCBS	\$699.00	\$170.00	\$869.00	80%	20%	Not provided
Town of Fuquay-Varina	Cigna	\$761.55	\$510.17	\$1,271.72	60%	40%	\$8,000
Town of Garner	BCBSNC	\$1,050.00	\$300.00	\$1,350.00	78%	22%	\$4,500
Town of Hillsborough	BCBS NC	\$906.36	\$388.44	\$1,294.80	70%	30%	\$6,000
Town of Holly Springs	Blue Cross	\$1,000.00	\$400.00	\$1,400.00	71%	29%	\$10,000
Town of Morrisville	BCBSNC Base	\$1,042.80	\$180.00	\$1,222.80	85%	15%	\$5,000
	BCBSNC Buy-up	\$959.04	\$387.00	\$1,346.04	71%	29%	\$3,000
Town of Pittsboro	BCBS	\$720.16	\$327.84	\$1,048.00	69%	31%	\$1500/\$3000
Town of Wake Forest	BCBS	\$900.00	\$100.00	\$1,000.00	90%	10%	\$7,000
Town of XXX	N/A						
Market Average:		\$963.85	\$316.07	\$1,289.72	76%	24%	\$6,306

XXX as % of Mkt Avg: N/A

Footnotes: City of Mebane did not provide employer contribution amount;
City of Sanford deductible = \$12,000 out-of-network;
Town of Cary - Employee amount is standard, they also have a "reward rate" of \$260 per month

Employee + Family Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County	BCBS	\$1,734.06	\$569.02	\$2,303.08	75%	25%	\$8,000
City of Asheboro	CIGNA	\$750.00	\$616.00	\$1,366.00	55%	45%	\$10,000
City of Burlington	Aetna	\$830.41	varies	Not provided	Not provided	Not provided	\$8,000
City of Durham	Aetna	\$1,906.54	\$188.19	\$2,094.73	91%	9%	\$10,000
City of Graham	BCBS Base	\$803.39	\$1,446.11	\$2,249.50	36%	64%	\$13,000
City of Mebane	United Healthcare	Not provided	\$640.14	Not provided	Not provided	Not provided	\$1,000
City of Sanford	BCBSNC	\$944.57	\$861.92	\$1,806.49	52%	48%	\$7,500
Orange County	Traditional	\$1,920.42	\$734.84	\$2,655.26	72%	28%	\$4,500
OWASA	BCBSNC	\$1,365.28	\$474.30	\$1,839.58	74%	26%	\$3,500
Town of Cary	BCBSNC	Not provided	\$922.76	Not provided	Not provided	Not provided	\$6,000
Town of Chapel Hill		\$734.55	\$1,563.15	\$2,297.70	32%	68%	Not provided
Town of Clayton		\$774.00	\$340.00	\$1,114.00	69%	31%	Not provided
Town of Fuquay-Varina	Cigna	\$761.55	\$1,192.68	\$1,954.23	39%	61%	\$8,000
Town of Garner	BCBSNC	\$1,500.00	\$1,000.00	\$2,500.00	60%	40%	\$4,500
Town of Hillsborough	BCBS NC	\$991.32	\$991.32	\$1,982.64	50%	50%	\$6,000
Town of Holly Springs	Blue Cross	\$1,300.00	\$1,000.00	\$2,300.00	57%	43%	\$10,000
Town of Morrisville	BCBSNC Base	\$1,712.20	\$470.00	\$2,182.20	78%	22%	\$5,000
	BCBSNC Buy-up	\$1,391.59	\$1,012.00	\$2,403.59	58%	42%	\$3,000
Town of Pittsboro	BCBS	\$720.16	\$1,311.06	\$2,031.22	35%	65%	\$1500/\$3000
Town of Wake Forest	BCBS	\$900.00	\$725.00	\$1,625.00	55%	45%	\$7,000
Town of XXX	N/A						
Market Average:		\$1,168.89	\$845.18	\$2,041.48	58%	42%	\$6,765
XXX as % of Mkt Avg: N/A							

Footnotes: City of Mebane did not provide employer contribution amount;
City of Sanford deductible = \$12,000 out-of-network
Town of Cary - Employer contribution left blank; employee amount is standard, they also have a "reward rate" of \$568 per month
City of Graham has a "buy up" option; employer contribution is the same and employee contribution is \$1670. Maximum out-of-pocket amount is \$8,000.

Notes:

According to the Employer Health Benefits 2024 Annual Survey, published by Kaiser Family Foundation, the average monthly total premium for Family Coverage, is \$2,274 for small firms (199 or fewer workers). For State/Local Government employers only, the average is \$1,978.
The average EMPLOYEE CONTRIBUTION for PPO Family Coverage is 25% (across all industries).

Table 18C. Health Plan Detail by Coverage Type - HDHP/CDHP

For each type of plan covered, please provide the following information:

Employee Only Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County							
City of Asheboro							
City of Burlington							
City of Durham							
City of Graham							
City of Mebane							
City of Sanford	BCBSNC	\$944.57	\$0.00	\$944.57	100%	0%	\$4,000
Orange County							
OWASA							
Town of Cary	BCBSNC	\$706.00	\$134.94	\$840.94	84%	16%	\$3,200
Town of Chapel Hill							
Town of Clayton							
Town of Fuquay-Varina							
Town of Garner							
Town of Hillsborough	BCBS NC	\$708.74	\$0.00	\$708.74	100%	0%	\$2,500
Town of Holly Springs							
Town of Morrisville							
Town of Pittsboro	BCBS	\$532.49	\$0.00	\$532.49	100%	0%	\$3,200
Town of Wake Forest							
Town of XXX	N/A						
Market Average:		\$722.95	\$33.74	\$756.69	96%	4%	\$3,225
XXX as % of Mkt Avg:	N/A						

Footnotes: City of Sanford out of network deductible = \$8,000

Town of Cary - Employee amount is standard, they also have a "reward rate" of \$34 per month

According to the **Employer Health Benefits 2024 Annual Survey, published by Kaiser Family Foundation**, the average monthly total premium for Single Coverage, is \$678 for small firms (199 or fewer workers). For State/Local Government employers only, the average is \$741.

The average EMPLOYEE CONTRIBUTION for HDHP Single Coverage is 15% (across all industries).

Employee + Spouse Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County							
City of Asheboro							
City of Burlington							
City of Durham							

City of Graham							
City of Mebane							
City of Sanford	BCBSNC	\$944.57	\$422.80	\$1,367.37	69%	31%	\$6,000
Orange County							
OWASA							
Town of Cary	BCBSNC	\$1,157.70	\$339.94	\$1,497.64	77%	23%	\$6,400
Town of Chapel Hill							
Town of Clayton							
Town of Fuquay-Varina							
Town of Garner							
Town of Hillsborough	BCBS NC	\$830.76	\$447.34	\$1,278.10	65%	35%	\$5,000
Town of Holly Springs							
Town of Morrisville							
Town of Pittsboro	BCBS	\$532.49	\$643.12	\$1,175.61	45%	55%	\$6,400
Town of Wake Forest							
Town of XXX	N/A						
Market Average:		\$866.38	\$463.30	\$1,329.68	64%	36%	\$5,950
XXX as % of Mkt Avg:	N/A						

Footnotes: Sanford out of network deductible = \$12,000

Town of Cary - Employee amount is standard, they also have a "reward rate" of \$200 per month

Employee + Child Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County							
City of Asheboro							
City of Burlington							
City of Durham							
City of Graham							
City of Mebane							
City of Sanford	BCBSNC	\$944.57	\$255.32	\$1,199.89	79%	21%	\$6,000
Orange County							
OWASA							
Town of Cary	BCBSNC	\$1,123.48	\$274.02	\$1,397.50	80%	20%	\$6,400
Town of Chapel Hill							
Town of Clayton							
Town of Fuquay-Varina							
Town of Garner							
Town of Hillsborough	BCBS NC	\$799.10	\$266.38	\$1,065.48	75%	25%	\$5,000
Town of Holly Springs							

Town of Morrisville							
Town of Pittsboro	BCBS	\$532.49	\$238.00	\$770.49	69%	31%	\$6,400
Town of Wake Forest							
Town of XXX	N/A						
Market Average:		\$849.91	\$258.43	\$1,108.34	76%	24%	\$5,950
XXX as % of Mkt Avg:	N/A						

Footnotes: City of Sanford - out of network deductible = \$12,000

Town of Cary - Employee amount is standard, they also have a "reward rate" of \$130 per month

Employee + Family Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County							
City of Asheboro							
City of Burlington							
City of Durham							
City of Graham							
City of Mebane							
City of Sanford	BCBSNC	\$944.57	\$646.44	\$1,591.01	59%	41%	\$6,000
Orange County							
OWASA							\$6,400
Town of Cary	BCBSNC	Not Provided	\$461.38	Not Provided	Not Provided	Not Provided	\$6,400
Town of Chapel Hill							
Town of Clayton							
Town of Fuquay-Varina							
Town of Garner							
Town of Hillsborough	BCBS NC	\$979.98	\$653.32	\$1,633.30	60%	40%	\$5,000
Town of Holly Springs							
Town of Morrisville							
Town of Pittsboro	BCBS	\$532.49	\$951.90	\$1,484.39	36%	64%	\$6,400
Town of Wake Forest							
Town of XXX	N/A						
Market Average:		\$819.01	\$678.26	\$1,569.57	52%	48%	\$6,040
XXX as % of Mkt Avg:	N/A						

Footnotes: City of Sandford - out of network deductible = \$12,000

Town of Cary - Employer contribution left blank; employee amount is standard, they also have a "reward rate" of \$282 per month

According to the Employer Health Benefits 2024 Annual Survey, published by Kaiser Family Foundation, the average monthly total premium for Family Coverage, is \$1,900 for small firms (199 or fewer workers). For State/Local Government employers only, the average is \$1,974.
The average EMPLOYEE CONTRIBUTION for HDHP Family Coverage is 24% (across all industries).

Table 18D. Health Plan Detail by Coverage Type - HDHP+MERP

For each type of plan covered, please provide the following information:

Employee Only Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County							
City of Asheboro							
City of Burlington							
City of Durham							
City of Graham							
City of Mebane							
City of Sanford							
Orange County							
OWASA							
Town of Cary							
Town of Chapel Hill							
Town of Clayton							
Town of Fuquay-Varina							
Town of Garner							
Town of Hillsborough							
Town of Holly Springs							
Town of Morrisville							
Town of Pittsboro							
Town of Wake Forest	BCBS	\$700.00	\$0.00	\$700.00	100%	0%	\$5,000
Town of XXX Market	Aetna	\$844.27	\$0.00	\$844.27	100%	0%	\$1,000
Average: XXX as % of Mkt		\$700.00	\$0.00	\$700.00	100%	0%	\$5,000
Avg:		121%	100%	121%	100%	100%	20%

Notes:

A peer sample size of one significantly limits conclusions we can make, but looking at all the tiers of coverage, there is some indication that XXX premiums are relatively expensive, and it is likely that the relatively low out-of-pocket benefit provided by the Town is contributing to that difference.

Employee + Spouse Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County							
City of Asheboro							
City of Burlington							

City of Durham							
City of Graham							
City of Mebane							
City of Sanford							
Orange County							
OWASA							
Town of Cary							
Town of Chapel Hill							
Town of Clayton							
Town of Fuquay-Varina							
Town of Garner							
Town of Hillsborough							
Town of Holly Springs							
Town of Morrisville							
Town of Pittsboro							
Town of Wake Forest	BCBS	\$900.00	\$225.00	\$1,125.00	80%	20%	\$10,000
Town of XXX Market	Aetna	\$1,357.62	\$454.26	\$1,811.88	75%	25%	\$2,000
Average: XXX as % of Mkt		\$900.00	\$225.00	\$1,125.00	80%	20%	\$10,000
Avg:		151%	202%	161%	94%	125%	20%

Footnotes:

Employee + Child Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County							
City of Asheboro							
City of Burlington							
City of Durham							
City of Graham							
City of Mebane							
City of Sanford							
Orange County							
OWASA							
Town of Cary							
Town of Chapel Hill							
Town of Clayton							
Town of Fuquay-Varina							

Town of Garner							
Town of Hillsborough							
Town of Holly Springs							
Town of Morrisville							
Town of Pittsboro							
Town of Wake Forest	BCBS	\$900.00	\$25.00	\$925.00	97%	3%	\$10,000
Town of XXX Market	Aetna	\$1,205.14	\$599.91	\$1,805.05	67%	33%	\$2,000
Average: XXX as % of Mkt		\$900.00	\$25.00	\$925.00	97%	3%	\$10,000
Avg:		134%	2400%	195%	69%	1230%	20%

Footnotes:

Employee + Family Coverage:							
Peer	Plan Provider	Employer Contribution to Monthly Premium (\$)	Employee Contribution to Monthly Premium (\$)	Total Monthly Premium (\$)	Employer Contribution to Monthly Premium (%)	Employee Contribution to Monthly Premium (%)	Maximum Out-of-Pocket (\$)
Chatham County							
City of Asheboro							
City of Burlington							
City of Durham							
City of Graham							
City of Mebane							
City of Sanford							
Orange County							
OWASA							
Town of Apex							
Town of Cary							
Town of Chapel Hill							
Town of Clayton							
Town of Fuquay-Varina							
Town of Garner							
Town of Hillsborough							
Town of Holly Springs							
Town of Morrisville							
Town of Pittsboro							
Town of Wake Forest	BCBS	\$900.00	\$600.00	\$1,500.00	60%	40%	\$10,000
Town of XXX Market	Aetna	\$1,792.85	\$599.91	\$2,392.76	75%	25%	\$2,000
Average: XXX as % of Mkt		\$900.00	\$600.00	\$1,500.00	60%	40%	\$10,000
Avg:		199%	100%	160%	125%	63%	20%

Table 19.

*If you offer a high deductible plan, please indicate the **employer annual contribution amount** to a Health Savings Account (H.S.A.) or Medical Expense Reimbursement Plan for each category. If you do not contribute to either, enter zero (\$0).*

Peer	Employee Only (\$)	Employee + Spouse (\$)	Employee + Child (\$)	Employee + Family (\$)
Chatham County				
City of Asheboro				
City of Burlington				
City of Durham				
City of Graham				
City of Mebane				
City of Sanford	\$750.00	\$750.00	\$750.00	\$750.00
Orange County				
OWASA				
Town of Cary	\$3,500.00	\$3,500.00	\$3,500.00	\$3,500.00
Town of Chapel Hill				
Town of Clayton				
Town of Fuquay-Varina				
Town of Garner				
Town of Hillsborough	\$1,573.20	\$1,573.20	\$1,573.20	\$1,573.20
Town of Holly Springs				
Town of Morrisville				
Town of Pittsboro	\$2,252.40	\$2,252.40	\$2,252.40	\$2,252.40
Town of Wake Forest	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00
Town of XXX Market	\$6,500.00	\$13,000.00	\$13,000.00	\$13,000.00
Average : XXX as % of	\$1,815.12	\$1,815.12	\$1,815.12	\$1,815.12
Mkt Avg:	358%	716%	716%	716%

Footnotes:

Orange County reported an amount of \$1416; however they reported only offering a PPO Plan

Notes:

XXX's relatively large medical expense contribution is considerably more generous than the peers who offer an HDHP/HAS or HDHP/MERP plan.

To fully understand the competitiveness of employer health coverage, the Deductible, Out-of-Pocket Maximum and HSA Account Contributions (made by the Employer) should be looked at fully and holistically. For example, according to the **Employer Health Benefits 2024 Annual Survey, published by Kaiser Family Foundation**, only 11% of the employees with an HDHP Plan receive an employer account contribution that if applied to the deductible, would reduce the deductible to \$1,000 or less. In general, HSA contributions are generally offered to reduce out-of-pocket expenses incurred by the employee, but not to eliminate them entirely.

Also according to the survey, only 25% of firms offering a High Deductible Health Plan offer a Health Savings Account employer contribution or reimbursement account, or in some cases both.

The average annual employer contribution to premiums for works in **HDHP/HRA**s is \$7,879 for single coverage and \$20,990 for family coverage. Further, covered workers enrolled in HDHP/HRAs on average receive an annual employer contribution to their HRA of \$1,724 for single coverage and \$3,274 for family coverage.

The average annual employer **Health Savings Account contribution** made by the employer in HSA-qualified HDHPs is \$705 for single coverage and \$1,297 for family coverage.

Actual HSA contributions made by employers as well as premium contributions (HDHP/HRA plans) vary considerably.

Table 20 (Questions 20-23) Other Types of Insurance

*Does your organization **pay** for the following types of insurance coverage?*

Peer	Employee Only Vision Coverage (Yes, No, Partial)	Employee Only Dental Coverage (Yes, No, Partial)	Short Term Disability Insurance (Yes, No)	Long Term Disability Insurance (Yes, No)
Chatham County	Yes	Yes	No	Yes
City of Asheboro	Yes	Yes	Yes	Yes
City of Burlington	Yes	No	No	No
City of Durham	Partial	Partial	Yes	Yes
City of Graham	Yes	Yes	Yes	Yes
City of Mebane	Yes	Yes	Yes	No
City of Sanford	Yes	Yes	Yes	No
Orange County	No	Yes	Yes	No
OWASA	Yes	Yes	No	Yes
Town of Cary	Yes	No	Yes	No
Town of Chapel Hill	Yes	No	Yes	Yes
Town of Clayton	No	Yes	Yes	Yes
Town of Fuquay-Varina	Yes	Yes	No	No
Town of Garner	No	Yes	Yes	No
Town of Hillsborough	Yes	Yes	Yes	Yes
Town of Holly Springs	No	Yes	No	Yes
Town of Morrisville	Yes	Yes	Yes	Yes
Town of Pittsboro	Yes	Yes	Yes	No
Town of Wake Forest	No	Yes	Yes	Yes
Town of XXX	Yes	No	No	Yes
Percent of "Yes" Responses:	68%	79%	74%	58%
Percent of "No" Responses:	26%	16%	26%	42%
Percent of "Partial" Responses:	5%	5%	0%	0%

Notes:

XXX's practice of providing the premium for Employee Only Vision Coverage as well as Long Term Disability Insurance is consistent with the majority or peer organizations.

However, XXX does not pay for the premium for Employee Only Dental Coverage and Short Term Disability Insurance, whereas about two thirds of the peer organizations do pay for the premiums for these two offerings.

24A. Please indicate the number of accrued days per year for vacation days, for the following years of service.

Footnotes: City of Burlington and Orange County provided total hours; both are 2080 annually, divided by 8 to get # of days

Notes:
 XXX's vacation accruals are one or slightly more than one day above the average market number of days at all but the first year of service, and are therefore market competitive, overall.

Footnotes: City of Burlington and Orange County provided total hours; both are 2080 annually, divided by 8 to get # of days;
City of Durham - "hours depending on schedule - stay the same";
City of Mebane - earn 8 hours per month; 2080 annually, counted as 1 day/month

Notes:
XXX's sick day accruals are slightly above market averages at each year of service interval, and overall.

030

Note:
XXX's vacation, sick and personal days programs are competitive. Particularly with a generous personal day program, the overall comparison places XXX in a very favorable position in the market, among its identified peers.

Table 25. Accrual Rate Negotiation

25 and 26. Can new employees negotiate annual leave accrual rates? If the answer is "YES", please provide the parameters.

Can new employees negotiate annual leave rates?			
Peer	Yes	No	Parameters/ Other Information Provided
Chatham County	X		Using credible service date from LGERS/TSERS employer
City of Asheboro		X	
City of Burlington	X		Years of Service in Government are reviewed
City of Durham		X	
City of Graham		X	
City of Mebane	X		Department Head and above.
City of Sanford		X	
Orange County		X	
OWASA		X	
Town of Cary		X	
Town of Chapel Hill		X	
Town of Clayton		X	Based on years of service in NC retirement system
Town of Fuquay-Varina		X	No, but employees accrue based on time in LGERS.
Town of Garner	X		
Town of Hillsborough	X		Typically higher level positions such as department directors and division managers may be brought in accruing at a higher rate. The most we've brought an employee in is at the rate of a 10 year employee. This is subject to the town manager's approval.
Town of Holly Springs		X	
Town of Morrisville	X		Very limited and at the discretion of the Town Manager.
Town of Pittsboro	X		Employees receive credit for service time in the retirement system to determine vacation accrual rates
Town of Wake Forest		X	
Town of XXX Number of Responses XXX as % of Mkt Avg:	X 7	 12	Generally years of service in ORBIT/NC LGRS

Notes:

The majority of peers do not allow for negotiated annual leave accrual rates. XXX does allow for some negotiation, joining a sizeable minority which in fact does allow for negotiation.

Table 27. Designated Paid Holidays

27. Is your organization closed to the public on the following holidays? Please indicate "Yes" or No".

	New Year's Day	MLK Birthday	President's Day	Good Friday	Memorial Day	Juneteenth	Independence Day	Labor Day	Indigenous Peoples/Columbus Day	Election Day	Veterans Day	Thanksgiving Day	Day After Thanksgiving	Christmas Eve	Christmas Day	New Year's Eve	Total
Peer	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	Yes or No	
Chatham County	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	13
City of Asheboro	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	11
City of Burlington	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	12
City of Durham	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	13
City of Graham	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	11
City of Mebane	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	12
City of Sanford	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	12
Orange County	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	No	11
OWASA	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	No	11
Town of Cary	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	13
Town of Chapel Hill	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	12
Town of Clayton	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	13
Town of Fuquay-Varina	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	12
Town of Garner	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	12
Town of Hillsborough	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	12
Town of Holly Springs	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	11
Town of Morrisville	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	12
Town of Pittsboro	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	13
Town of Wake Forest	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	11
Town of XXX	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	12
Number of "Yes" Responses	19	19	0	19	19	12	19	19	0	0	15	19	19	19	19	10	12
Number of "No" Responses	0	0	19	0	0	7	0	0	19	19	4	0	0	0	0	9	
XXX Practice Not Consistent with Prevalent Market Practice:																	X

Footnotes:

x

Notes:

XXX's holiday program is generally consistent with the market. In the case of New Year Year's Eve, while XXX does not provide that day as a holiday, the practice is clearly "mixed" among the peers. We also note that XXX's count of named holidays is one lower than the average in the market. XXX's use of "personal days" is however, notably more generous than the market as noted in Tab 24.

Table 28. Number of Floating Holidays

28. How many floating holidays (in days) do employees receive each year (in addition to paid holidays, vacation and sick leave). Please include any additional days around Christmas Eve or Christmas Day in this number).

Peer	Number of Floating Holidays
Chatham County	0
City of Asheboro	
City of Burlington	1
City of Durham	1
City of Graham	1
City of Mebane	1
City of Sanford	1
Orange County	1
OWASA	1
Town of Cary	1
Town of Chapel Hill	3
Town of Clayton	
Town of Fuquay-Varina	4
Town of Garner	2
Town of Hillsborough	1
Town of Holly Springs	3
Town of Morrisville	3
Town of Pittsboro	1
Town of Wake Forest	1
Town of XXX	1
Market Average:	1.5
XXX vs. Market Average:	0.5

Footnotes: City of Mebane - On the form they listed "1 personal day", which was logged in the Vacation/Sick/Personal grid. However, according to their benefits doc, they do get 3 days at Christmas, so left it at 1;

OWASA - entered the following note "No floating holidays, but OWASA is closed for 3 days at Christmas"; so entered 1 here since Christmas Eve and Christmas Day are counted under Named Holidays.

Town of Clayton - entered "112." Assume this is an error & did not enter;

Town of Garner - 1 floating holiday, 1 extra day at Christmas;

Town of Holly Springs - 3 days at Christmas, 2 floating holidays - Interpreted this to be 3 total since Christmas Eve and Christmas Day are counted under Named Holidays.;

Town of Morrisville - 2 floating holidays per year. Also, the Town is closed for one additional day around the Christmas holiday - Interpreted this to be 3 total;

Town of Carrboro - 0, but do give a 3rd day at Christmas - Interpreted this to be 1 total since Christmas Eve and Christmas Day are counted under Named Holidays.

Notes:

XXX's number of floating holidays is below the average in the market, however as noted earlier, XXX's "personal days" provision is above market.

Table 29. Defined Contribution Plans

29. If your organization contributes to employees' 401(k) plan, how much is contributed?

30. Does your organization offer a 457 plan?

401(K) Plan Employer Contributions:				
Peer	Organization Does Not Contribute	Percent of Salary Contributed	Flat Dollar Amount Contributed	
Chatham County		5.00%		
City of Asheboro				
City of Burlington		5.00%		
City of Durham		5.00%		
City of Graham		5.00%		
City of Mebane		5.00%		
City of Sanford		5.00%		
Orange County			\$688 annually plus 5% match	
OWASA	X			
Town of Cary		5.00%		
Town of Chapel Hill		5.00%		
Town of Clayton		12.98%		
Town of Fuquay-Varina		5.00%		
Town of Garner		5.00%		
Town of Hillsborough		5.00%		
Town of Holly Springs		5.00%		
Town of Morrisville		5.00%		
Town of Pittsboro		5.00%		
Town of Wake Forest		5.00%		
Town of Carrboro		3.00%	\$0	contributes 5% for Law Enforcement ranked personnel
Market Summary:	Only 1 organization does not contribute	5.50%	\$688	
Carrboro as % of Mkt Avg:		55%	0%	

Footnotes:
The maximum contribution percentage for Graham is 5%.

Notes:
XXX Employer Contribution percentage does not match the most common employer contribution (5.0%).

457 Plan Offered?	
Peer	457 Plan Offered (Yes or No)
Chatham County	Yes
City of Asheboro	Yes
City of Burlington	Yes
City of Durham	Yes
City of Graham	Yes
City of Mebane	Yes
City of Sanford	Yes
Orange County	Yes
OWASA	Yes
Town of Cary	Yes
Town of Chapel Hill	Yes
Town of Clayton	Yes
Town of Fuquay-Varina	Yes
Town of Garner	Yes
Town of Hillsborough	Yes
Town of Holly Springs	Yes
Town of Morrisville	Yes
Town of Pittsboro	Yes
Town of Wake Forest	Yes
Town of Carrboro	Yes
Number of "Yes" Responses	19
Number of "No" Responses	0
Carrboro as % of Mkt Avg:	

Footnotes: OWASA contributes 5% to 457

Notes:
All of XXX's named peers do offer a 457 Plan.

Table 31. Other Benefits

31. Please choose any of the following benefits your organization offers to employees. Choose all that apply.

Peer	Retiree Health Insurance	Tuition Reimbursement	Paid Parental Leave	Paid Caregiver Leave	Service Level Benefit (Longevity Pay)	Employee Assistance Program	Remote Work Policy	Flexible Scheduling (e.g. 4 - 10 hour days, alternate start and end times, etc.)	Sabbatical Leave
Chatham County	X			X		X	X	X	
City of Asheboro	X					X			
City of Burlington		X	X		X	X	X	X	X
City of Durham	X	X	X			X	X	X	
City of Graham	X	X			X	X		X	
City of Mebane	X				X	X			X
City of Sanford	X	X			X	X		X	
Orange County	X	X	X		X	X	X		
OWASA	X	X	X			X	X	X	
Town of Cary	X	X	X			X		X	
Town of Chapel Hill	X	X	X		X	X	X	X	
Town of Clayton		X	X			X			
Town of Fuquay-Varina	X	X	X	X	X	X	X		
Town of Garner	X	X	X	X	X	X	X	X	
Town of Hillsborough	X	X	X		X	X	X	X	
Town of Holly Springs		X	X	X	X	X	X	X	
Town of Morrisville	X	X	X		X	X	X	X	
Town of Pittsboro		X	X		X	X	X		
Town of Wake Forest		X	X	X	X	X	X	X	
Town of Carrboro	X	X	X	X	X	X	X	X	
Number of "Yes" Responses	14	16	14	5	13	19	13	13	2
Number of "No" Responses	5	3	5	13	6	0	6	6	17
Carrboro is Inconsistent with Prevalent Market Practice				X					

Notes:

Carrboro has two benefit programs that are provided only by a small number of peer organizations, namely Paid Caregiver Leave and a Sabbatical Leave Program. In all other benefits offered by Carrboro among this list, the major of peers also offer some type of program. We imagine that the terms of the programs may differ significantly, from our experience. The two additional benefits offered by Carrboro that are not common should assist the Town in its "employer value proposition".

Table 32. Wellness Benefits

32. Please describe any benefits that are meant to support employee wellness activities (e.g., wellness benefits, gym memberships, etc.).

Peer	Response
Chatham County	On-site flu clinic and health screening events. Wellness activities.
City of Asheboro	None
City of Burlington	Lunch & Learn events throughout the year, Annual Wellness Fair, Fitness Reimbursement for Gym memberships
City of Durham	free City gyms, wellness activities, etc.
City of Graham	Gym memberships for full-time employees who attend our annual health fair.
City of Mebane	wellness benefits
City of Sanford	wellness programs, HealthMapRx diabetes and cardiovascular programs, biometric screenings, on-site gym equipment at various locations
Orange County	gym membership- employee paid
OWASA	\$180 per year eligible for wellness reimbursement (gym memberships, weight loss programs, exercise classes, etc.
Town of Cary	Varied employee wellness benefits including access to onsite gym equipment, health and wellness apps, onsite and virtual health coaching, etc.
Town of Chapel Hill	gym membership, wellness benefits/clinic
Town of Clayton	Wellness Program, gym reimbursement
Town of Fuquay-Varina	gym membership (community center & town hall)
Town of Garner	Per fiscal year: 2 days wellness leave, 16 hours community involvement leave, 8 hours preventive care leave, one floating holiday (leaves do not accrue or carryover to next fiscal year). Gym membership reimbursement program
Town of Hillsborough	wellness reimbursement program
Town of Holly Springs	1 wellness day, free membership to P&R run fitness center
Town of Morrisville	Employees and their immediate family and retirees and their spouse receive free membership to the Morrisville Aquatics and Fitness Center
Town of Pittsboro	We offer 5 days of "mental health" leave per fiscal year without question. It is subtracted from their sick leave and the time does not accrue or roll over. No documentation is required for mental health leave.
Town of Wake Forest	Wellness Hour-1 hour per month
Town of Carrboro	gym membership, wellness program that offers wellness opportunities during work time.
Carrboro as % of Mkt Avg:	

Note:

There is a wide variety of practices among the Town's peers. The Town may find benefit from following up on programs that seem viable.

Table 33. Unique Benefits

33. Please describe any unique benefits offered by your organization that employees particularly enjoy:

Peer	Response
Chatham County	N/A
City of Asheboro	Employee Health Clinic
City of Burlington	Vacation Buy Back Program
City of Durham	Pet Insurance
City of Graham	Shared Sick Leave
City of Mebane	No response
City of Sanford	No response
Orange County	Pet Insurance, Legal Services
OWASA	No response
Town of Cary	Vacation sell back, 10 additional leave days (non-accrued each fiscal year), lifestyle spending account
Town of Chapel Hill	Pet Insurance, Identify Theft Protection, Voluntary Accident and Critical Illness
Town of Clayton	Annual Employee Vacation Pay-Out
Town of Fuquay-Varina	Opt-out option for insurance if covered under outside carrier.
Town of Garner	Resident rate discounts for fees for rentals and programs through our Parks, Recreation and Cultural Resources Department.
Town of Hillsborough	LGERS Vacation Accrual Rates
Town of Holly Springs	No response
Town of Morrisville	No response
Town of Pittsboro	Employees who show proof of other insurance coverage, can waive Town coverage and receive a health insurance stipend, which is 50% of the highest premium.
Town of Wake Forest	Tuition assistance, Pet Insurance
Town of Carrboro	EAP includes legal and financial counseling
Carrboro as % of Mkt Avg:	

Notes:

Such as was the case in Wellness Programs, there is a wide variety of programs and benefits utilized among the Town's peers, some of which may be worth further investigation by the Town of Carrboro.

Table 34. Additional Comments

34. Additional Comments:

Peer	Response
Chatham County	
City of Asheboro	
City of Burlington	
City of Durham	
City of Graham	Retiree health insurance only available to full-time employees hired on or before June 30, 2014.
City of Mebane	
City of Sanford	
Orange County	
OWASA	
Town of Apex	
Town of Cary	
Town of Chapel Hill	
Town of Clayton	
Town of Fuquay-Varina	Shift employees accrue vacation at a different rate. Sick time accrual varies based on years of service.
Town of Garner	We offer a Healthcare and Dependent Care Flexing Spending plan, and supplemental life insurance at the employee's expense (Basic Life is provided to full time employees at 1x annual at no additional cost.)
Town of Hillsborough	Feel free to contact me with questions or for additional information - haley.thore@hillsboroughnc.gov or 919-296-9442.
Town of Holly Springs	Fire and Police accrue vacation and sick at a higher rate due their annual hours
Town of Morrisville	Employees do receive vacation accrual rate based on their active LGERS or TSERS service
Town of Pittsboro	
Town of Wake Forest	
Town of Carrboro	3rd Christmas paid holiday
Carrboro as % of Mkt Avg:	

Footnotes:

Exhibit 3: Recommended “General” Pay Structure with Details

Town of Carrboro

Classification and Compensation Study Update (2025)

General Pay Structure - "At Market" Structure 3/2/2025

Pay Grade	Pay Range Minimum	Pay Range Midpoint	Pay Range Maximum	Min to Mid (\$)	Min to Mid (%)	Mid to Max (\$)	Mid to Max (%)	Range Width (\$)	Range Width (%)
1	\$34,940	\$43,675	\$54,506	\$8,735	25.0%	\$10,831	24.8%	\$19,566	56.0%
2	\$39,169	\$48,961	\$61,104	\$9,792	25.0%	\$12,142	24.8%	\$21,935	56.0%
3	\$43,398	\$54,248	\$67,701	\$10,850	25.0%	\$13,453	24.8%	\$24,303	56.0%
4	\$47,627	\$59,534	\$74,299	\$11,907	25.0%	\$14,764	24.8%	\$26,671	56.0%
5	\$51,857	\$64,821	\$80,896	\$12,964	25.0%	\$16,076	24.8%	\$29,040	56.0%
6	\$56,086	\$70,107	\$87,494	\$14,021	25.0%	\$17,387	24.8%	\$31,408	56.0%
7	\$60,315	\$75,394	\$94,091	\$15,079	25.0%	\$18,698	24.8%	\$33,776	56.0%
8	\$64,544	\$80,680	\$100,689	\$16,136	25.0%	\$20,009	24.8%	\$36,145	56.0%
9	\$68,773	\$85,967	\$107,286	\$17,193	25.0%	\$21,320	24.8%	\$38,513	56.0%
10	\$73,003	\$91,253	\$113,884	\$18,251	25.0%	\$22,631	24.8%	\$40,881	56.0%
11	\$77,232	\$96,540	\$120,482	\$19,308	25.0%	\$23,942	24.8%	\$43,250	56.0%
12	\$81,461	\$101,826	\$127,079	\$20,365	25.0%	\$25,253	24.8%	\$45,618	56.0%
13	\$85,690	\$107,113	\$133,677	\$21,423	25.0%	\$26,564	24.8%	\$47,986	56.0%
14	\$89,919	\$112,399	\$140,274	\$22,480	25.0%	\$27,875	24.8%	\$50,355	56.0%
15	\$94,149	\$117,686	\$146,872	\$23,537	25.0%	\$29,186	24.8%	\$52,723	56.0%
16	\$98,378	\$122,972	\$153,469	\$24,594	25.0%	\$30,497	24.8%	\$55,092	56.0%
17	\$104,722	\$130,902	\$163,366	\$26,180	25.0%	\$32,464	24.8%	\$58,644	56.0%
18	\$113,180	\$141,475	\$176,561	\$28,295	25.0%	\$35,086	24.8%	\$63,381	56.0%
19	\$121,638	\$152,048	\$189,756	\$30,410	25.0%	\$37,708	24.8%	\$68,117	56.0%
20	\$130,097	\$162,621	\$202,951	\$32,524	25.0%	\$40,330	24.8%	\$72,854	56.0%
21	\$138,555	\$173,194	\$216,146	\$34,639	25.0%	\$42,952	24.8%	\$77,591	56.0%
22	\$147,014	\$183,767	\$229,341	\$36,753	25.0%	\$45,574	24.8%	\$82,328	56.0%
23	\$155,472	\$194,340	\$242,536	\$38,868	25.0%	\$48,196	24.8%	\$87,064	56.0%

Exhibit 4: Recommended “Public Safety” Pay Structure with Details

Town of Carrboro
Classification and Compensation Study Update (2025)
Public Safety Pay Structure - "At Market" Structure
3/2/2025

Pay Grade	Pay Range Minimum	Pay Range Midpoint	Pay Range Maximum	Min to Mid (\$)	Min to Mid (%)	Mid to Max (\$)	Mid to Max (%)	Range Width (\$)	Range Width (%)
PS01	\$37,238	\$46,548	\$58,092	\$9,310	25.0%	\$11,544	24.8%	\$20,853	56.0%
PS02	\$41,551	\$51,939	\$64,820	\$10,388	25.0%	\$12,881	24.8%	\$23,269	56.0%
PS03	\$45,864	\$57,330	\$71,548	\$11,466	25.0%	\$14,218	24.8%	\$25,684	56.0%
PS04	\$50,177	\$62,721	\$78,276	\$12,544	25.0%	\$15,555	24.8%	\$28,099	56.0%
PS05	\$54,490	\$68,112	\$85,004	\$13,622	25.0%	\$16,892	24.8%	\$30,514	56.0%
PS06	\$58,802	\$73,503	\$91,732	\$14,701	25.0%	\$18,229	24.8%	\$32,929	56.0%
PS07	\$63,115	\$78,894	\$98,460	\$15,779	25.0%	\$19,566	24.8%	\$35,344	56.0%
PS08	\$67,428	\$84,285	\$105,188	\$16,857	25.0%	\$20,903	24.8%	\$37,760	56.0%
PS09	\$71,741	\$89,676	\$111,916	\$17,935	25.0%	\$22,240	24.8%	\$40,175	56.0%
PS10	\$76,054	\$95,067	\$118,644	\$19,013	25.0%	\$23,577	24.8%	\$42,590	56.0%
PS11	\$80,366	\$100,458	\$125,372	\$20,092	25.0%	\$24,914	24.8%	\$45,005	56.0%
PS12	\$84,679	\$105,849	\$132,100	\$21,170	25.0%	\$26,251	24.8%	\$47,420	56.0%
PS13	\$88,992	\$111,240	\$138,827	\$22,248	25.0%	\$27,588	24.8%	\$49,836	56.0%
PS14	\$93,305	\$116,631	\$145,555	\$23,326	25.0%	\$28,924	24.8%	\$52,251	56.0%
PS15	\$97,618	\$122,022	\$152,283	\$24,404	25.0%	\$30,261	24.8%	\$54,666	56.0%
PS16	\$101,930	\$127,413	\$159,011	\$25,483	25.0%	\$31,598	24.8%	\$57,081	56.0%
PS17	\$108,400	\$135,499	\$169,103	\$27,100	25.0%	\$33,604	24.8%	\$60,704	56.0%
PS18	\$117,025	\$146,281	\$182,559	\$29,256	25.0%	\$36,278	24.8%	\$65,534	56.0%
PS19	\$125,651	\$157,063	\$196,015	\$31,413	25.0%	\$38,952	24.8%	\$70,364	56.0%
PS20	\$134,276	\$167,845	\$209,471	\$33,569	25.0%	\$41,626	24.8%	\$75,195	56.0%
PS21	\$142,902	\$178,627	\$222,927	\$35,725	25.0%	\$44,300	24.8%	\$80,025	56.0%
PS22	\$151,528	\$189,409	\$236,383	\$37,882	25.0%	\$46,974	24.8%	\$84,855	56.0%
PS23	\$160,153	\$200,191	\$249,839	\$40,038	25.0%	\$49,647	24.8%	\$89,686	56.0%

Exhibit 5:

“General” Pay Plan Grade Order List

Town of Carrboro
Classification and Compensation Study Update (2025)
Grade Order List - General Structure
Created: 1/22/2025
Revised: 3/2/2025

Pay Structure	Pay Grade	Range Minimum	Range Midpoint	Range Maximum	Classification Title	FLSA Classification
G	2	\$39,169	\$48,961	\$61,104	Administrative Services Specialist I	Non-Exempt
					Custodian	Non-Exempt
					Administrative Services Specialist I	Non-Exempt
					Administrative Services Specialist I	Non-Exempt
G	3	\$43,398	\$54,248	\$67,701	Accounting Technician/Receptionist	Non-Exempt
					Permit Technician	Non-Exempt
					Administrative Services Specialist II	Non-Exempt
					Maintenance/Construction Worker I	Non-Exempt
					Solid Waste Equipment Operator I	Non-Exempt
					Administrative Services Specialist II	Non-Exempt
G	4	\$47,627	\$59,534	\$74,299	Administrative Services Specialist III	Non-Exempt
					Administrative Services Specialist III	Non-Exempt
					Assistant to Mayor/Deputy Town Clerk	Non-Exempt
					Maintenance/Construction Worker II	Non-Exempt
					Solid Waste Equipment Operator II	Non-Exempt
					Administrative Services Specialist III	Non-Exempt
G	5	\$51,857	\$64,821	\$80,896	Program Coordinator	Non-Exempt
					Code Enforcement Officer I	Non-Exempt
					Maintenance/Construction Worker III	Non-Exempt
					Mechanic I	Non-Exempt
					Solid Waste Equipment Operator III	Non-Exempt
					Building Maintenance Specialist	Non-Exempt
G	6	\$56,086	\$70,107	\$87,494	Economic Development Specialist	Non-Exempt
					End User and Networking Support Technician	Non-Exempt
					Coordinator - Recreation Programs and Events	Non-Exempt
					Code Enforcement Officer II	Non-Exempt
					GIS Technician	Non-Exempt
					Stormwater Assistance Coordinator	Non-Exempt

Town of Carrboro
 Classification and Compensation Study Update (2025)
 Grade Order List - General Structure
 Created: 1/22/2025
 Revised: 3/2/2025

Pay Structure	Pay Grade	Range Minimum	Range Midpoint	Range Maximum	Classification Title	FLSA Classification
G	7	\$60,315	\$75,394	\$94,091	Payroll and Benefits Coordinator	Non-Exempt
					Staff Accountant	Exempt
					Crew Leader - Maintenance/Construction	Non-Exempt
					Human Resources Generalist I	Exempt
					Mechanic II	Non-Exempt
					Planner I - Land Use	Non-Exempt
					Planner I - Zoning	Non-Exempt
					Engineering Inspector	Non-Exempt
					Horticulturalist	Non-Exempt
G	8	\$64,544	\$80,680	\$100,689	Communications and Engagement Specialist	Non-Exempt
					Procurement Coordinator	Non-Exempt
					Housing and Community Services Specialist	Exempt
					Planner II	Exempt
					Planner II - Environmental	Exempt
					Engineer I	Non-Exempt
					Administrative Services Manager	Non-Exempt
					Race and Equity Professional	Non-Exempt
					Supervisor - Park and Recreation Facilities	Non-Exempt
					Supervisor - Recreation	Non-Exempt
G	9	\$68,773	\$85,967	\$107,286	Management Analyst	Exempt
					Human Resources Generalist II	Exempt
					Stormwater Specialist	Exempt
					Stormwater Specialist	Exempt
					Planner III - Transportation	Exempt

Town of Carrboro
Classification and Compensation Study Update (2025)
Grade Order List - General Structure
Created: 1/22/2025
Revised: 3/2/2025

Pay Structure	Pay Grade	Range Minimum	Range Midpoint	Range Maximum	Classification Title	FLSA Classification
G	10	\$73,003	\$91,253	\$113,884	Grants Program Manager	Exempt
					IT Systems Administrator	Exempt
					Climate Action Program Manager	Exempt
					Supervisor - Fleet Maintenance	Exempt
					Engineer II	Exempt
					Supervisor - Solid Waste	Exempt
G	11	\$77,232	\$96,540	\$120,482	Supervisor - Code Enforcement	Exempt
					Manager - GIS	Non-Exempt
					Supervisor - Building Maintenance	Exempt
					Supervisor - Maintenance/Construction	Exempt
G	12	\$81,461	\$101,826	\$127,079	Manager - IT Operations	Exempt
					Manager - Park and Recreation Facilities	Non-Exempt
					Professional Engineer	Exempt
G	13	\$85,690	\$107,113	\$133,677	Manager - Programs Division	Exempt
G	14	\$89,919	\$112,399	\$140,274	Manager - Development Review	Exempt
					Manager - Planning and Transportation	Exempt
					Manager - Capital Projects	Exempt
G	15	\$94,149	\$117,686	\$146,872	Deputy Finance Director	Exempt
					Manager - Stormwater	Exempt
					Chief Sustainability Officer	Exempt
					Chief Race and Equity Officer	Exempt
G	16	\$98,378	\$122,972	\$153,469	Manager - Public Works Operations	Exempt
G	17	\$104,722	\$130,902	\$163,366	Director - Communications and Engagement	Exempt
					Director - Economic Development	Exempt
G	18	\$113,180	\$141,475	\$176,561	Director - Housing and Community Services	Exempt
G	19	\$121,638	\$152,048	\$189,756	Director - Human Resources	Exempt
					Director - Parks, Recreation and Cultural Resources	Exempt

Town of Carrboro
 Classification and Compensation Study Update (2025)
 Grade Order List - General Structure
 Created: 1/22/2025
 Revised: 3/2/2025

Pay Structure	Pay Grade	Range Minimum	Range Midpoint	Range Maximum	Classification Title	FLSA Classification
G	20	\$130,097	\$162,621	\$202,951	Director - Finance	Exempt
					Director - Planning	Exempt
G	21	\$138,555	\$173,194	\$216,146	Director - Information Technology	Exempt
					Director - Public Works	Exempt
G	23	\$155,472	\$194,340	\$242,536	Assistant Town Manager	Exempt

Exhibit 6:

“Public Safety” Pay Plan Pay Grade Order List

Town of Carrboro
Classification and Compensation Study Update (2025)
Grade Order List - Public Safety Structure
3/2/2025

Pay Structure	Pay Grade	Range Minimum	Range Midpoint	Range Maximum	Classification Title	FLSA Classification
PS	PS04	\$50,177	\$62,721	\$78,276	Firefighter Trainee	Non-Exempt
PS	PS05	\$54,490	\$68,112	\$85,004	Firefighter - EMT/Relief Driver	Non-Exempt
					Police Trainee	Non-Exempt
PS	PS06	\$58,802	\$73,503	\$91,732	Police Officer I	Non-Exempt
PS	PS07	\$63,115	\$78,894	\$98,460	Fire Driver Operator	Non-Exempt
					Police Officer II	Non-Exempt
PS	PS08	\$67,428	\$84,285	\$105,188	Fire Driver Mechanic	Non-Exempt
					Fire Inspector	Non-Exempt
					Police Officer III	Non-Exempt
PS	PS10	\$76,054	\$95,067	\$118,644	Police Sergeant - Community Services and Administration	Non-Exempt
					Police Sergeant - Patrol	Non-Exempt
PS	PS11	\$80,366	\$100,458	\$125,372	Fire Captain	Non-Exempt
					Fire Marshall	Non-Exempt
PS	PS12	\$84,679	\$105,849	\$132,100	Police Lieutenant - Community Services	Non-Exempt
PS	PS13	\$88,992	\$111,240	\$138,827	Battalion Chief	Non-Exempt
					Police Lieutenant - Patrol	Non-Exempt
					Police Lieutenant - Investigations	Non-Exempt
PS	PS15	\$97,618	\$122,022	\$152,283	Police Captain - Investigations and Community Services	Exempt
					Police Captain - Patrol	Exempt
PS	PS17	\$108,400	\$135,499	\$169,103	Deputy Fire Chief	Exempt
PS	PS20	\$134,276	\$167,845	\$209,471	Fire Chief	Exempt
PS	PS21	\$142,902	\$178,627	\$222,927	Police Chief	Exempt

Exhibit 7:

Classification Cross-Reference List (Previous to New Title, Grade, FLSA Classification)

(highlighted jobs are moving into multiple job titles)

Recommended Pay Structure (G - General; PS - Public Safety)	Recommended Pay Grade	Recommended Range Minimum	Recommended Range Midpoint	Recommended Range Maximum	Recommended Classification Title	Recommended FLSA Classification	Current Job Code	Current Job Title	Current Pay Grade	Current Minimum	Current Market Rate	Current Midpoint	Current Maximum	Current Department	Current FLSA Designation
G	2	\$39,169	\$48,961	\$61,104	Administrative Services Specialist I	Non-Exempt	PSPT	Program Support Assistant II	103	\$35,836	\$43,720	\$45,679	\$55,525	Fire - Germain	Non-Exempt
					Custodian	Non-Exempt	CUST	Custodian	101	\$32,504	\$39,655	\$41,433	\$50,362	Public Works	Non-Exempt
					Administrative Services Specialist I	Non-Exempt	AA	Administrative Assistant	107	\$43,559	\$53,141	\$55,524	\$67,490	Rec, Parks & Cultural Resources - Alston-Sanders	Non-Exempt
					Administrative Services Specialist I	Non-Exempt	PS I	Program Support Assistant I	101	\$32,504	\$39,655	\$41,433	\$50,362	Rec, Parks & Cultural Resources - Henson	Non-Exempt
G	3	\$43,398	\$54,248	\$67,701	Accounting Technician/Receptionist	Non-Exempt	ATI	Accounting Technician/Receptionist	104	\$37,628	\$45,906	\$47,964	\$58,300	Finance	Non-Exempt
					Permit Technician	Non-Exempt	PT	Permit Technician	105	\$39,510	\$48,201	\$50,362	\$61,215	Planning	Non-Exempt
					Administrative Services Specialist II	Non-Exempt	PSPT	Program Support Assistant II	103	\$35,836	\$43,720	\$45,679	\$55,525	Police - Camacho	Non-Exempt
					Maintenance/Construction Worker I	Non-Exempt	MC-W	Maintenance/Construction Worker I	103	\$35,836	\$43,720	\$45,679	\$55,525	Public Works	Non-Exempt
					Solid Waste Equipment Operator I	Non-Exempt	SOL	Solid Waste Equipment Operator I	102	\$34,129	\$41,838	\$43,504	\$52,880	Public Works	Non-Exempt
					Administrative Services Specialist II	Non-Exempt	PSPT	Program Support Assistant II - PT	103	\$35,836	\$43,720	\$45,679	\$55,525	Rec, Parks & Cultural Resources - Kirk	Non-Exempt
G	4	\$47,627	\$59,534	\$74,299	Administrative Services Specialist III	Non-Exempt	AA	Administrative Assistant	107	\$43,559	\$53,141	\$55,524	\$67,490	Police - Allred	Non-Exempt
					Administrative Services Specialist III	Non-Exempt	AA	Administrative Assistant	107	\$43,559	\$53,141	\$55,524	\$67,490	Police - Stipe	Non-Exempt
					Assistant to Mayor/Deputy Town Clerk	Non-Exempt	DYTC	Assistant to Mayor / Deputy Town Clerk	109	\$48,023	\$58,589	\$61,215	\$74,407	Town Clerk's Office	Non-Exempt
					Maintenance/Construction Worker II	Non-Exempt	CWII	Maintenance/Construction Worker II	105	\$39,510	\$48,201	\$50,362	\$61,215	Public Works	Non-Exempt
					Solid Waste Equipment Operator II	Non-Exempt	SWII	Solid Waste Equipment Operator II	104	\$37,628	\$45,906	\$47,964	\$58,300	Public Works	Non-Exempt
					Administrative Services Specialist III	Non-Exempt	AA	Administrative Assistant	107	\$43,559	\$53,141	\$55,524	\$67,490	Public Works - White-Kelly	Non-Exempt
G	5	\$51,857	\$64,821	\$80,896	Program Coordinator	Non-Exempt	AA	Administrative Assistant	107	\$43,559	\$53,141	\$55,524	\$67,490	Housing & Comm Services - Summery	Non-Exempt
					Code Enforcement Officer I	Non-Exempt	CEOI	Code Enforcement Officer I	108	\$45,737	\$55,799	\$58,300	\$70,684	Planning	Non-Exempt
					Maintenance/Construction Worker III	Non-Exempt	SMSP	Maintenance/Construction Worker III	107	\$43,559	\$53,141	\$55,524	\$67,490	Public Works	Non-Exempt
					Mechanic I	Non-Exempt	MC I	Mechanic I	105	\$39,510	\$48,201	\$50,362	\$61,215	Public Works	Non-Exempt
					Solid Waste Equipment Operator III	Non-Exempt	SWIII	Solid Waste Equipment Operator III	106	\$41,484	\$50,611	\$52,880	\$64,276	Public Works	Non-Exempt
					Building Maintenance Specialist	Non-Exempt	BMSP	Building Maintenance Specialist	107	\$43,559	\$53,141	\$55,524	\$67,490	Public Works - Janicki	Non-Exempt
G	6	\$56,086	\$70,107	\$87,494	Economic Development Specialist	Non-Exempt	EDSP	Economic Development Specialist	109	\$48,023	\$58,589	\$61,215	\$74,407	Economic Development	Non-Exempt
					End User and Networking Support Technician	Non-Exempt	ITSI	IT Support Engineer I	114	\$61,291	\$74,775	\$78,128	\$94,965	Information and Technology	Exempt
					Coordinator - Recreation Programs and Events	Non-Exempt	ACTM	Activity Manager	105	\$39,510	\$48,201	\$50,362	\$61,215	Parks, Rec and Cultural Resources	Non-Exempt
					Code Enforcement Officer II	Non-Exempt	CEOII	Code Enforcement Officer II	110	\$50,425	\$61,518	\$64,276	\$78,128	Planning	Non-Exempt
					GIS Technician	Non-Exempt	GIST	GIS Technician	109	\$48,023	\$58,589	\$61,215	\$74,407	Planning	Non-Exempt
					Stormwater Assistance Coordinator	Non-Exempt	SWAC	Stormwater Assistance Coordinator	113	\$58,373	\$71,215	\$74,408	\$90,443	Public Work	Non-Exempt
G	7	\$60,315	\$75,394	\$94,091	Payroll and Benefits Coordinator	Non-Exempt	ATII	Payroll & Benefits Coordinator	111	\$52,946	\$64,594	\$67,490	\$82,034	Finance	Exempt
					Staff Accountant	Exempt	STAC	Staff Accountant	114	\$61,291	\$74,775	\$78,128	\$94,965	Finance	Exempt
					Crew Leader - Maintenance/Construction	Non-Exempt	STCL	Crew Leader	108	\$45,737	\$55,799	\$58,300	\$70,684	Public Works	Non-Exempt
					Human Resources Generalist I	Exempt	PERA	Human Resources Analyst	113	\$58,373	\$71,215	\$74,408	\$90,443	Human Resources	Exempt
					Mechanic II	Non-Exempt	MC II	Mechanic II	107	\$43,559	\$53,141	\$55,524	\$67,490	Public Works	Non-Exempt
					Planner I - Land Use	Non-Exempt	PLNN	Planner I - Land Use	113	\$58,373	\$71,215	\$74,408	\$90,443	Planning	Non-Exempt
					Planning/Zoning Development Specialist	Non-Exempt	PZDS	Planner I - Zoning	113	\$58,373	\$71,215	\$74,408	\$90,443	Planning	Non-Exempt
					Engineering Inspector	Non-Exempt	ENIN	Engineering Inspector	112	\$55,593	\$67,824	\$70,684	\$86,136	Public Works	Non-Exempt
					Horticulturalist	Non-Exempt	HORT	Horticulturist	109	\$48,023	\$58,589	\$61,215	\$74,407	Public Works	Non-Exempt
					Communications and Engagement Specialist	Non-Exempt	CES	Communications & Engagement Specialist	109	\$48,023	\$58,589	\$61,215	\$74,407	Communications and Engagement	Non-Exempt
G	8	\$64,544	\$80,680	\$100,689	Procurement Coordinator	Non-Exempt	PCOR	Procurement Coordinator	114	\$61,291	\$74,775	\$78,128	\$94,965	Finance	Exempt
					Housing and Community Services Specialist	Exempt	HCSG	Housing & Community Services Coordinator	114	\$61,291	\$74,775	\$78,128	\$94,965	Housing & Community Services	Exempt
					Planner II	Exempt	PLII	Planner II	114	\$61,291	\$74,775	\$78,128	\$94,965	Planning	Non-Exempt
					Environmental Planner	Exempt	ENPL	Planner II - Environmental	114	\$61,291	\$74,775	\$78,128	\$94,965	Planning	Non-Exempt
					Engineer I	Non-Exempt	ENGI	Engineer I	113	\$58,373	\$71,215	\$74,408	\$90,443	Public Works	Non-Exempt
					Administrative Services Manager	Non-Exempt	ADAN	Assistant to Public Works Director	114	\$61,291	\$74,775	\$78,128	\$94,965	Public Works - Benoit	Exempt
					Race and Equity Professional	Non-Exempt	REMG	Race & Equity Manager	117	\$70,952	\$86,562	\$90,443	\$109,934	Town Manager	Exempt
					Supervisor - Park and Recreation Facilities	Non-Exempt	FACS	Facilities Supervisor	110	\$50,425	\$61,518	\$64,276	\$78,128	Parks, Rec and Cultural Resources	Non-Exempt
					Supervisor - Recreation	Non-Exempt	RECS	Recreation Supervisor	110	\$50,425	\$61,518	\$64,276	\$78,128	Parks, Rec and Cultural Resources - Blume, Eichel, Hughes, Poyl	Non-Exempt
					Management Analyst	Exempt	ASTM	Assistant to the Town Manager	116	\$67,574	\$82,440	\$86,136	\$104,699	Town Manager - Stahl	Exempt

(highlighted jobs are moving into multiple job titles)

Recommended Pay Structure (G - General; PS - Public Safety)	Recommended Pay Grade	Recommended Range Minimum	Recommended Range Midpoint	Recommended Range Maximum	Recommended Classification Title	Recommended FLSA Classification	Current Job Code	Current Job Title	Current Pay Grade	Current Minimum	Current Market Rate	Current Midpoint	Current Maximum	Current Department	Current FLSA Designation
G	9	\$68,773	\$85,967	\$107,286	Human Resources Generalist II	Exempt	SHRA	Senior Human Resources Analyst	115	\$84,356	\$78,566	\$82,034	\$99,713	Human Resources	Exempt
					Stormwater Specialist	Exempt	SWAD	Stormwater Administrator	114	\$81,291	\$74,775	\$78,128	\$94,965	Planning	Exempt
					Stormwater Specialist	Exempt	SWSP	Stormwater Specialist	115	\$84,356	\$78,566	\$82,034	\$99,713	Planning	Exempt
					Planner III - Transportation	Exempt	TRPL	Transportation Planner	114	\$81,291	\$74,775	\$78,128	\$94,965	Planning	Non-Exempt
G	10	\$73,003	\$91,253	\$113,884	Grants Program Manager	Exempt	GMR	Grants Manager	117	\$70,952	\$86,562	\$90,443	\$109,934	Finance	Exempt
					IT Systems Administrator	Exempt	ITSA	IT Systems Administrator	115	\$84,356	\$78,566	\$82,034	\$99,713	Information and Technology	Exempt
					Climate Action Program Manager	Exempt	ENSC	Environmental Sustainability Coordinator	116	\$87,574	\$82,440	\$86,136	\$104,699	Planning	Exempt
					Supervisor - Fleet Maintenance	Exempt	FLMSU	Fleet Maintenance Supervisor	113	\$58,373	\$71,215	\$74,408	\$90,443	Public Works	Exempt
					Engineer II	Exempt	ENGI	Proposed Series - Engineer II (Engineer Intern)	113	\$58,373	\$71,215	\$74,408	\$90,443	Public Works	Non-Exempt
					Supervisor - Solid Waste	Exempt	SWSV	Solid Waste Supervisor	113	\$58,373	\$71,215	\$74,408	\$90,443	Public Works	Non-Exempt
G	11	\$77,232	\$96,540	\$120,482	Supervisor - Code Enforcement	Exempt	CEOS	Code Enforcement Supervisor	117	\$70,952	\$86,562	\$90,443	\$109,934	Planning	Exempt
					Manager - GIS	Non-Exempt	GAD	GIS Administrator	115	\$84,356	\$78,566	\$82,034	\$99,713	Planning	Exempt
					Supervisor - Building Maintenance	Exempt	BMSU	Building Maintenance Supervisor	113	\$58,373	\$71,215	\$74,408	\$90,443	Public Works	Exempt
					Supervisor - Maintenance/Construction	Exempt	STSU	Streets & Grounds Supervisor	113	\$58,373	\$71,215	\$74,408	\$90,443	Public Works	Non-Exempt
G	12	\$81,461	\$101,826	\$127,079	Manager - IT Operations	Exempt	ITSE	IT Operations Manager	116	\$87,574	\$82,440	\$86,136	\$104,699	Information and Technology	Exempt
					Manager - Park and Recreation Facilities	Non-Exempt	FAOO	Facilities Administrator	115	\$84,356	\$78,566	\$82,034	\$99,713	Parks, Rec and Cultural Resources	Exempt
					Professional Engineer	Exempt	ENGI	Proposed Series - Professional Engineer	113	\$58,373	\$71,215	\$74,408	\$90,443	Public Works	Non-Exempt
G	13	\$85,690	\$107,113	\$133,677	Manager - Programs Division	Exempt	RECA	Recreation Administrator	115	\$84,356	\$78,566	\$82,034	\$99,713	Parks, Rec and Cultural Resources	Exempt
G	14	\$89,919	\$112,399	\$140,274	Manager - Development Review	Exempt	DEVR	Development Review Administrator	118	\$74,500	\$90,890	\$94,965	\$115,430	Planning	Exempt
					Manager - Planning and Transportation	Exempt	PLAD	Planning & Transportation Administrator	118	\$74,500	\$90,890	\$94,965	\$115,430	Planning	Exempt
					Manager - Capital Projects	Exempt	CPM	Capital Projects Manager	116	\$87,574	\$82,440	\$86,136	\$104,699	Public Works	Exempt
G	15	\$94,149	\$117,686	\$146,872	Deputy Finance Director	Exempt	DFID	Deputy Finance Director	119	\$78,225	\$95,434	\$99,713	\$121,202	Finance	Exempt
					Manager - Stormwater	Exempt	SWUM	Stormwater Manager	117	\$70,952	\$86,562	\$90,443	\$109,934	Planning	Exempt
					Chief Sustainability Officer	Exempt	CSO	Chief Sustainability Officer	126	\$110,070	\$134,286	\$140,307	\$170,070	Town Manager	Exempt
					Chief Race and Equity Officer	Exempt	CREO	Chief Race & Equity Officer	126	\$110,070	\$134,286	\$140,307	\$170,070	Town Manager	Exempt
G	16	\$98,378	\$122,972	\$153,469	Manager - Public Works Operations	Exempt	DPWD	Deputy Public Works Director	119	\$78,225	\$95,434	\$99,713	\$121,202	Planning	Exempt
G	17	\$104,722	\$130,902	\$163,366	Director - Communications and Engagement	Exempt	CED	Communications & Engagement Director	122	\$90,555	\$110,477	\$115,431	\$140,306	Communications and Engagement	Exempt
					Director - Economic Development	Exempt	ECDD	Economic Development Director	122	\$90,555	\$110,477	\$115,431	\$140,306	Economic Development	Exempt
G	18	\$113,180	\$141,475	\$176,561	Director - Housing and Community Services	Exempt	HCSO	Housing & Community Services Director	122	\$90,555	\$110,477	\$115,431	\$140,306	Housing & Community Services	Exempt
G	19	\$121,638	\$152,048	\$189,756	Director - Human Resources	Exempt	PERD	Human Resources Director	123	\$95,083	\$116,001	\$121,202	\$147,322	Human Resources	Exempt
					Director - Parks, Recreation and Cultural Resources	Exempt	RPCR	Recreation, Parks & Cultural Resources Director	123	\$95,083	\$116,001	\$121,202	\$147,322	Parks, Rec and Cultural Resources	Exempt
G	20	\$130,097	\$162,621	\$202,951	Director - Finance	Exempt	FID	Finance Director	124	\$99,837	\$121,801	\$127,262	\$154,688	Finance	Exempt
					Director - Planning	Exempt	PLDI	Planning Director	124	\$99,837	\$121,801	\$127,262	\$154,688	Planning	Exempt
G	21	\$138,555	\$173,194	\$216,146	Director - Information Technology	Exempt	MIT	Information & Technology Director	123	\$95,083	\$116,001	\$121,202	\$147,322	Information and Technology	Exempt
					Director - Public Works	Exempt	PWDR	Public Works Director	125	\$104,829	\$127,891	\$133,625	\$162,422	Public Works	Exempt
G	23	\$155,472	\$194,340	\$242,536	Assistant Town Manager	Exempt	ATM	Assistant Town Manager	128	\$121,353	\$148,050	\$154,688	\$188,024	Town Manager	Exempt

(highlighted jobs are moving into multiple job titles)

Recommended Pay Structure (G - General; PS - Public Safety)	Recommended Pay Grade	Recommended Range Minimum	Recommended Range Midpoint	Recommended Range Maximum	Recommended Classification Title	Recommended FLSA Classification	Current Job Code	Current Job Title	Current Pay Grade	Current Minimum	Current Market Rate	Current Midpoint	Current Maximum	Current Department	Current FLSA Designation
PS	PS04	\$50,177	\$62,721	\$78,276	Firefighter Trainee	Non-Exempt	FT	Fire Trainee	105	\$39,510	\$48,201	\$50,362	\$61,215	Fire	Non-Exempt
PS	PS05	\$54,490	\$68,112	\$85,004	Firefighter - EMT/Relief Driver	Non-Exempt	FF	Firefighter/Relief Driver	107	\$43,559	\$53,141	\$55,524	\$67,490	Fire	Non-Exempt
					Police Trainee	Non-Exempt	POT	Police Trainee	106	\$41,484	\$50,611	\$52,880	\$64,276	Police	Non-Exempt
PS	PS06	\$58,802	\$73,503	\$91,732	Police Officer I	Non-Exempt	POI	Police Officer I	111	\$52,946	\$64,594	\$67,490	\$82,034	Police	Non-Exempt
PS	PS07	\$63,115	\$78,894	\$98,460	Fire Driver Operator	Non-Exempt	FDRO	Fire Driver Operator	110	\$50,425	\$61,518	\$64,276	\$78,128	Fire	Non-Exempt
					Police Officer II	Non-Exempt	POI	Police Officer II	112	55593	67824	70864	86136	Police	Non-Exempt
PS	PS08	\$67,428	\$84,285	\$105,188	Fire Driver Mechanic	Non-Exempt	FDRM	Fire Driver Mechanic	111	\$52,946	\$64,594	\$67,490	\$82,034	Fire	Non-Exempt
					Fire Inspector	Non-Exempt	FI	Fire Inspector	113	\$58,373	\$71,215	\$74,408	\$90,443	Fire	Non-Exempt
					Police Officer III	Non-Exempt	Pill	Police Officer III	113	58373	71215	74408	90443	Police	Non-Exempt
PS	PS10	\$76,054	\$95,067	\$118,644	Police Sergeant - Community Services and Administration	Non-Exempt	PSGT	Police Sergeant	114	\$61,291	\$74,775	\$78,128	\$94,965	Police - Hobby	Non-Exempt
					Police Sergeant - Patrol	Non-Exempt	PSGTPAT	Police Sergeant	114	\$61,291	\$74,775	\$78,128	\$94,965	Police - Lassiter, DeShaies	Non-Exempt
PS	PS11	\$80,366	\$100,458	\$125,372	Fire Captain	Non-Exempt	FCAP	Fire Captain	112	\$55,593	\$67,824	\$70,864	\$86,136	Fire	Non-Exempt
					Fire Marshall	Non-Exempt	FMSU	Fire Marshal	116	\$67,574	\$82,440	\$86,136	\$104,699	Fire	Non-Exempt
PS	PS12	\$84,679	\$105,849	\$132,100	Police Lieutenant - Community Services	Non-Exempt	POLT	Police Lieutenant	116	\$67,574	\$82,440	\$86,136	\$104,699	Police - Walker	Non-Exempt
PS	PS13	\$88,992	\$111,240	\$138,827	Battalion Chief	Non-Exempt	BC	Battalion Chief	114	\$61,291	\$74,775	\$78,128	\$94,965	Fire	Non-Exempt
					Police Lieutenant - Patrol	Non-Exempt	POLT	Police Lieutenant	116	\$67,574	\$82,440	\$86,136	\$104,699	Police - Coyle, Thomas	Non-Exempt
					Police Lieutenant - Investigations	Non-Exempt	POLT	Police Lieutenant	116	\$67,574	\$82,440	\$86,136	\$104,699	Police - Kennedy	Non-Exempt
PS	PS15	\$97,618	\$122,022	\$152,283	Police Captain - Investigations and Community Services	Exempt	PCPT	Police Captain	119	\$78,225	\$95,434	\$99,713	\$121,202	Police - Daniels	Exempt
					Police Captain - Patrol	Exempt	PCPT	Police Captain	119	\$78,225	\$95,434	\$99,713	\$121,202	Police - Ward	Exempt
PS	PS17	\$108,400	\$135,499	\$169,103	Deputy Fire Chief	Exempt	DFC	Deputy Fire Chief	119	\$78,225	\$95,434	\$99,713	\$121,202	Fire	Exempt
PS	PS20	\$134,276	\$167,845	\$209,471	Fire Chief	Exempt	FC	Fire Chief	124	\$99,837	\$121,801	\$127,262	\$154,688	Fire	Exempt
PS	PS21	\$142,902	\$178,627	\$222,927	Police Chief	Exempt	PCHF	Police Chief	125	\$104,829	\$127,891	\$133,625	\$162,422	Police	Exempt

Exhibit 8: Comparison of New Pay Grade Midpoints Points to Average Market Midpoints (for Benchmark Jobs)

Town of Carrboro
Classification and Compensation Study Update (2025)

Variance of Recommended Midpoint to Market Average Midpoint for Benchmark Roles

3/2/2025

Market Variance Analysis

Highlighted - outside of
competitive range

Average: 101%

Current Job Title	Current Department	Current Pay Grade	Recommended Classification Title	Recommended Pay Structure (G - General; PS - Public Safety)	Recommended Pay Grade	Benchmark Market Assessment Average Midpoint (Adjusted)	Recommended Range Minimum	Recommended Range Midpoint	Recommended Range Maximum	New Midpoint/Average Market Midpoint
Program Support Assistant I	Rec, Parks & Cultural Resources - Henson	101	Administrative Services Specialist I	G	2	\$55,410	\$39,169	\$48,961	\$61,104	88%
Program Support Assistant II	Fire - Germain	103	Administrative Services Specialist I	G	2	\$55,410	\$39,169	\$48,961	\$61,104	88%
Maintenance/Construction Worker I	Public Works	103	Maintenance/Construction Worker I	G	3	\$51,982	\$43,398	\$54,248	\$67,701	104%
Permit Technician	Planning	105	Permit Technician	G	3	\$57,035	\$43,398	\$54,248	\$67,701	95%
Solid Waste Equipment Operator I	Public Works	102	Solid Waste Equipment Operator I	G	3	\$54,284	\$43,398	\$54,248	\$67,701	100%
Administrative Assistant	Police - Allred	107	Administrative Services Specialist II	G	4	\$54,065	\$47,627	\$59,534	\$74,299	110%
Administrative Assistant	Housing & Comm Services - Summery	107	Program Coordinator	G	5	\$54,065	\$51,857	\$64,821	\$80,896	120%
Building Maintenance Specialist	Public Works - Janicki	107	Building Maintenance Specialist	G	5	\$61,283	\$51,857	\$64,821	\$80,896	106%
Code Enforcement Officer I	Planning	108	Code Enforcement Officer I	G	5	\$68,081	\$51,857	\$64,821	\$80,896	95%
Solid Waste Equipment Operator III	Public Works	106	Solid Waste Equipment Operator III	G	5	\$60,741	\$51,857	\$64,821	\$80,896	107%
GIS Technician	Planning	109	GIS Technician	G	6	\$71,400	\$56,086	\$70,107	\$87,494	98%
Human Resources Analyst	Human Resources	113	Human Resources Generalist I	G	7	\$85,667	\$60,315	\$75,394	\$94,091	88%
Payroll & Benefits Coordinator	Finance	111	Payroll and Benefits Coordinator	G	7	\$70,883	\$60,315	\$75,394	\$94,091	106%
Planner	Planning	113	Planner I - Land Use	G	7	\$79,150	\$60,315	\$75,394	\$94,091	95%
Communications & Engagement Specialist	Communications and Engagement	109	Communications and Engagement Specialist	G	8	\$74,947	\$64,544	\$80,680	\$100,689	108%
Planner II - Environmental	Planning	114	Planner II - Environmental	G	8	\$88,296	\$64,544	\$80,680	\$100,689	91%
Procurement Coordinator	Finance	114	Procurement Coordinator	G	8	\$84,170	\$64,544	\$80,680	\$100,689	90%
Recreation Supervisor	Parks, Rec and Cultural Resources - Blume, Eichel, Hoke, Ruffalo, Reed	110	Supervisor - Recreation	G	8	\$70,771	\$64,544	\$80,680	\$100,689	114%
Transportation Planner	Planning	114	Planner III - Transportation	G	9	\$85,399	\$68,773	\$85,967	\$107,286	101%
IT Systems Administrator	Information and Technology	115	IT Systems Administrator	G	10	\$98,942	\$73,003	\$91,253	\$113,884	92%
Proposed Series - Engineer II (Engineer Intern)	Public Works	113	Engineer II	G	10	\$86,543	\$73,003	\$91,253	\$113,884	105%
Solid Waste Supervisor	Public Works	113	Supervisor - Solid Waste	G	10	\$77,348	\$73,003	\$91,253	\$113,884	118%
Code Enforcement Supervisor	Planning	117	Supervisor - Code Enforcement	G	11	\$84,943	\$77,232	\$96,540	\$120,482	114%
GIS Administrator	Planning	115	Manager - GIS	G	11	\$102,786	\$77,232	\$96,540	\$120,482	94%
Streets & Grounds Supervisor	Public Works	113	Supervisor - Maintenance/Construction	G	11	\$78,207	\$77,232	\$96,540	\$120,482	123%

Variance of Recommended Midpoint to Market Average Midpoint for Benchmark Roles

3/2/2025

Market Variance Analysis

Highlighted - outside of
competitive range

Average: 101%

Current Job Title	Current Department	Current Pay Grade	Recommended Classification Title	Recommended Pay Structure (G - General; PS - Public Safety)	Recommended Pay Grade	Benchmark Market Assessment Average Midpoint (Adjusted)	Recommended Range Minimum	Recommended Range Midpoint	Recommended Range Maximum	New Midpoint/Average Market Midpoint
IT Operations Manager	Information and Technology	116	Manager - IT Operations	G	12	\$120,261	\$81,461	\$101,826	\$127,079	85%
Recreation Administrator	Parks, Rec and Cultural Resources	115	Manager - Programs Division	G	13	\$110,741	\$85,690	\$107,113	\$133,677	97%
Planning & Transportation Administrator	Planning	118	Manager - Planning and Transportation	G	14	\$114,125	\$89,919	\$112,399	\$140,274	98%
Chief Race & Equity Officer	Town Manager	126	Chief Race and Equity Officer	G	15	\$128,189	\$94,149	\$117,686	\$146,872	92%
Stormwater Manager	Planning	117	Manager - Stormwater	G	15	\$101,242	\$94,149	\$117,686	\$146,872	110%
Communications & Engagement Director	Communications and Engagement	122	Director - Communications and Engagement	G	17	\$138,663	\$104,722	\$130,902	\$163,366	94%
Economic Development Director	Economic Development	122	Director - Economic Development	G	17	\$149,330	\$104,722	\$130,902	\$163,366	88%
Human Resources Director	Human Resources	123	Director - Human Resources	G	19	\$151,445	\$121,638	\$152,048	\$189,756	100%
Finance Director	Finance	124	Director - Finance	G	20	\$160,226	\$130,097	\$162,621	\$202,951	101%
Planning Director	Planning	124	Director - Planning	G	20	\$149,883	\$130,097	\$162,621	\$202,951	108%
Public Works Director	Public Works	125	Director - Public Works	G	21	\$158,713	\$138,555	\$173,194	\$216,146	109%
Firefighter/Relief Driver	Fire	107	Firefighter - EMT/Relief Driver	PS	PS05	\$72,075	\$54,490	\$68,112	\$85,004	95%
Police Officer I	Police	111	Police Officer I	PS	PS06	\$74,287	\$58,802	\$73,503	\$91,732	96%
Fire Driver Operator	Fire	110	Fire Driver Operator	PS	PS07	\$78,985	\$63,115	\$78,894	\$98,480	100%
Police Sergeant	Police - Hobby	114	Police Sergeant - Community Services and Administration	PS	PS10	\$94,532	\$76,054	\$95,067	\$118,644	101%
Police Sergeant	Police - Lassiter, DeShaies	114	Police Sergeant - Patrol	PS	PS10	\$94,532	\$76,054	\$95,067	\$118,644	101%
Fire Captain	Fire	112	Fire Captain	PS	PS11	\$94,126	\$80,366	\$100,458	\$125,372	107%
Fire Marshal	Fire	116	Fire Marshal	PS	PS11	\$106,409	\$80,366	\$100,458	\$125,372	94%
Police Lieutenant	Police - Walker	116	Police Lieutenant - Community Services	PS	PS12	\$104,345	\$84,679	\$105,849	\$132,100	101%
Battalion Chief	Fire	114	Battalion Chief	PS	PS13	\$108,657	\$88,992	\$111,240	\$138,827	102%
Police Lieutenant	Police - Coyle, Thomas	116	Police Lieutenant - Patrol	PS	PS13	\$104,345	\$88,992	\$111,240	\$138,827	107%
Police Lieutenant	Police - Kennedy	116	Police Lieutenant - Investigations	PS	PS13	\$104,345	\$88,992	\$111,240	\$138,827	107%
Deputy Fire Chief	Fire	119	Deputy Fire Chief	PS	PS17	\$135,021	\$108,400	\$135,499	\$169,103	100%
Fire Chief	Fire	124	Fire Chief	PS	PS20	\$170,741	\$134,276	\$167,845	\$209,471	98%
Police Chief	Police	125	Police Chief	PS	PS21	\$170,716	\$142,902	\$178,627	\$222,927	105%



City of Beaver Dam, Wisconsin
Engineering Office

TO: Common Council
FROM: Larry Konopacki
SUBJECT: Ordinance Amending Chapter 58 of the City of Beaver Dam Municipal Code Regarding Land Division

The Issue:

Enclosed is an ordinance amending portions of Chapter 58 of the City code to address the provisions of 2025 Wisconsin Act 68.

Considerations:

2025 Wisconsin Act 68 reforms the state's subdivision plat approval process to streamline housing development and reduce costs. It requires local governments to offer non-binding pre-submission reviews, caps financial security for public improvements at 120 percent of estimated costs, and limits permit holds.

Does this item have a financial or budget impact?

No

Recommendation:

Staff recommend approval of the Ordinance Amendment as presented.

Attachments:

1. Ordinance No. 14-2026
2. Draft Ordinance
3. 2025 Wisconsin Act 68
4. 2025 Wisconsin Act 68 Memo

**ORDINANCE NO. 14-2026
CITY OF BEVAER DAM**

**AN ORDINANCE AMENDING CHAPTER 58 OF THE CITY OF BEAVER DAM
MUNICIPAL CODE REGARDING LAND DIVISION**

The City Council of the City of Beaver Dam, Dodge County, do ordain as follows:

ORDINANCE

SECTION I: Section 58-1 of the City of Beaver Dam Municipal Code is amended to read as follows:

Sec. 58-1. Purpose of chapter.

The purpose of this chapter is to promote the public health, safety and general welfare of the community. The regulations of this chapter are designed to further the ordinary layout and use of land; ensure that land is developed in a manner that supports healthy, livable communities; foster the development of a range of housing types; advance complete streets that prioritize safety, comfort, and accessibility for pedestrians, cyclists, transit riders, and motorists alike; encourage development patterns that provide safe and convenient transportation choices for a variety of users; facilitate adequate provision for water, sewerage, schools, parks, playgrounds and other public requirements; and facilitate the further resubdivision of larger tracts into smaller parcels of land. The regulations of this chapter are made with reasonable consideration of the character of the city with a view to conserve the value of the buildings placed upon the land, providing the best possible environment for human habitation, and for encouraging the most appropriate use of land throughout the city.

SECTION II: Section 58-5 of the City of Beaver Dam Municipal Code is amended to read as follows:

Sec. 58-5. Building permits.

No building permits shall be issued for erection of a structure on any lot in any subdivision governed by this chapter until all the requirements of this chapter have been complied with. The city shall not withhold the release of any home site building permits that meet the requirements of applicable building codes, zoning ordinances, and other city regulations solely because of the status of public improvements.

SECTION III: Section 58-6(a) of the City of Beaver Dam Municipal Code is amended to read as follows:

Sec. 58-6. Specific procedures.

(a) *Preliminary plat.*

- (1) Prior to filing a preliminary plat, development plan, or certified survey, the subdivider shall consult with the Plan Commission for advice and assistance for the purpose of determining land suitability and reviewing the procedures and requirements of this chapter and other ordinances and any plans or data which may affect the proposed development.
- (2) Before submitting a final plat for approval, the subdivider shall submit a preliminary plat and such copies thereof as shall be required for the council for preliminary approval. A preliminary plat may contain preliminary, rather than final, plans and reports regarding sewer, water, road cross-sections, grading, stormwater, soil testing, landscaping, and street lighting.
- (3) After review of the preliminary plat and negotiations with the subdivider on changes deemed advisable and the kind and extent of public improvements and other dedications which will be required, the council shall, within 40 days of its submission, approve, approve conditionally, or reject the plat. The subdivider shall be notified in writing of any conditions of approval or the reasons for objection. Any preliminary plat containing the preliminary plans and reports specified in subparagraph (2) may not be rejected on that basis alone but may be approved conditioned upon the submission of final plans and reports prior to final plat approval.
- (4) Approval of the preliminary plat shall entitle the subdivider to final approval of the layout shown by such plat if the final plat conforms substantially to such layout and the conditions of approval have been met.
- (5) The subdivider shall, at the time of filing the preliminary plat, submit a letter from each utility serving the area, stating that the utility has reviewed a true and correct copy of the proposed preliminary plat and that the utility has located the utility easements required on a true and correct copy which they have in their possession.
- (6) All lands within the limits of the preliminary plat shall be, by operation of this chapter, zoned R-1 residential, unless such lands have heretofore been zoned otherwise by the city. In that case, the existing zoning shall continue.
- (7) The preliminary plat shall be drawn with waterproof nonfading black ink or legibly drawn with pencil on tracing paper of good quality, or tracing cloth, on a scale of not more than 100 feet to an inch and shall be in sufficient detail, including contour lines of the terrain and contain such information as will determine whether the design of the final plat will conform to this chapter.
- (8) Supplementary information: The subdivider shall furnish the following information with his preliminary plat:

- a. A brief description of the improvements such as streets, pedestrian ways, lighting, tree planting and installation of utilities, etc.
- b. A brief description of the deed restrictions, if any, which will be put on the plat.

(9) The fee for submission of a preliminary plat is \$300.00 plus \$10.00 per lot.

SECTION IV: Section 58-9(b) of the City of Beaver Dam Municipal Code is amended to read as follows:

- (b) *Required installations.* Before the final plat of a subdivision will be approved by the council, the subdivider shall agree to install, provide and dedicate to the city the following facilities and improvements in accordance with standards approved by the council and administered by the operations committee within a reasonable time after a final plat is approved. The subdivider shall assume the costs of such facilities as noted herein. All public improvements required under this section shall be guaranteed to the city against any structural, mechanical or electrical failure or defect by the subdivider for a period of one year following acceptance by the council of the subdivided dedication of the same. There shall be a written contract between the subdivider and his contractor for construction of all required public improvements. The contract shall include a 100 percent contract bond with the city as a beneficiary, good for one year following acceptance by the council of the subdivided dedication of the same.

SECTION V: All other provisions of chapter 58 shall remain in full force and effect unless specifically modified herein.

SECTION III: Said ordinance is effective upon its passage and publication.

Presented by the members of the Plan Commission.

First Reading – July 20, 2026

Adopted: August 3, 2026

By a vote of: _____ in favor, _____ opposed, and _____ abstain.

Roberta Marck, Mayor

Tracey Ferron, City Clerk

ORDINANCE NO. [REDACTED]
CITY OF BEAVER DAM

AN ORDINANCE AMENDING CHAPTER 58 OF THE CITY OF BEAVER DAM
MUNICIPAL CODE REGARDING LAND DIVISION

The City Council of the City of Beaver Dam, Dodge County, do ordain as follows:

ORDINANCE

SECTION I: Section 58-1 of the City of Beaver Dam Municipal Code is amended to read as follows (deletions are shown as a ~~strikethrough~~ and additions are shown with an underline):

Sec. 58-1. Purpose of chapter.

The purpose of this chapter is to promote the public health, safety and general welfare of the community. The regulations of this chapter are designed to further the ordinary layout and use of land; ensure that land is developed in a manner that supports healthy, livable communities; foster the development of a range of housing types; advance complete streets that prioritize safety, comfort, and accessibility for pedestrians, cyclists, transit riders, and motorists alike; encourage development patterns that provide safe and convenient transportation choices for a variety of users; for transportation, facilitate adequate provision for water, sewerage, schools, parks, playgrounds and other public requirements; and facilitate the further resubdivision of larger tracts into smaller parcels of land. The regulations of this chapter are made with reasonable consideration of the character of the city with a view to conserve the value of the buildings placed upon the land, providing the best possible environment for human habitation, and for encouraging the most appropriate use of land throughout the city.

SECTION II: Section 58-5 of the City of Beaver Dam Municipal Code is amended to read as follows (deletions are shown as a ~~strikethrough~~ and additions are shown with an underline):

Sec. 58-5. Building permits.

No building permits shall be issued for erection of a structure on any lot in any subdivision governed by this chapter until all the requirements of this chapter have been complied with. The city shall not withhold the release of any home site building permits

that meet the requirements of applicable building codes, zoning ordinances, and other city regulations solely because of the status of public improvements.

SECTION III: Section 58-6(a) of the City of Beaver Dam Municipal Code is amended to read as follows (deletions are shown as a ~~strikethrough~~ and additions are shown with an underline):

Sec. 58-6. Specific procedures.

(a) *Preliminary plat.*

- (1) Prior to filing a preliminary plat, development plan, or certified survey, the subdivider shall consult with the Plan Commission for advice and assistance for the purpose of determining land suitability and reviewing the procedures and requirements of this chapter and other ordinances and any plans or data which may affect the proposed development.
- (2) Before submitting a final plat for approval, the subdivider shall submit a preliminary plat and such copies thereof as shall be required for the council for preliminary approval. A preliminary plat may contain preliminary, rather than final, plans and reports regarding sewer, water, road cross-sections, grading, stormwater, soil testing, landscaping, and street lighting.
- (3) After review of the preliminary plat and negotiations with the subdivider on changes deemed advisable and the kind and extent of public improvements and other dedications which will be required, the council shall, within 40 days of its submission, approve, approve conditionally, or reject the plat. The subdivider shall be notified in writing of any conditions of approval or the reasons for objection. Any preliminary plat containing the preliminary plans and reports specified in subparagraph (2) may not be rejected on that basis alone but may be approved conditioned upon the submission of final plans and reports prior to final plat approval.
- (4) Approval of the preliminary plat shall entitle the subdivider to final approval of the layout shown by such plat if the final plat conforms substantially to such layout and the conditions of approval have been met.
- (5) The subdivider shall, at the time of filing the preliminary plat, submit a letter from each utility serving the area, stating that the utility has reviewed a true and correct copy of the proposed preliminary plat and that the utility has

located the utility easements required on a true and correct copy which they have in their possession.

- (6) All lands within the limits of the preliminary plat shall be, by operation of this chapter, zoned R-1 residential, unless such lands have heretofore been zoned otherwise by the city. In that case, the existing zoning shall continue.
- (7) The preliminary plat shall be drawn with waterproof nonfading black ink or legibly drawn with pencil on tracing paper of good quality, or tracing cloth, on a scale of not more than 100 feet to an inch and shall be in sufficient detail, including contour lines of the terrain and contain such information as will determine whether the design of the final plat will conform to this chapter.
- (8) Supplementary information: The subdivider shall furnish the following information with his preliminary plat:
 - a. A brief description of the improvements such as streets, pedestrian ways, lighting, tree planting and installation of utilities, etc.
 - b. A brief description of the deed restrictions, if any, which will be put on the plat.
- (9) The fee for submission of a preliminary plat is \$300.00 plus \$10.00 per lot.

SECTION IV: Section 58-9(b) of the City of Beaver Dam Municipal Code is amended to read as follows (deletions are shown as a ~~strikethrough~~ and additions are shown with an underline):

- (b) *Required installations.* Before the final plat of a subdivision will be approved by the council, the subdivider shall agree to install, provide and dedicate to the city the following facilities and improvements in accordance with standards approved by the council and administered by the operations committee within a reasonable time after a final plat is approved. The subdivider shall assume the costs of such facilities as noted herein. All public improvements required under this section shall be guaranteed to the city against any structural, mechanical or electrical failure or defect by the subdivider for a period of one year following acceptance by the council of the subdivided dedication of the same. There shall be a written contract between the subdivider and his contractor for construction of all required public improvements. The contract shall include a 100 percent contract bond with the city as a beneficiary, good for one year following acceptance by the council of the subdivided dedication of the same.

SECTION V: All other provisions of chapter 58 shall remain in full force and effect unless specifically modified herein.

SECTION III: Said ordinance is effective upon its passage and publication.

The above ordinance was duly adopted by a majority vote of the elected members of the City Council of the City of Beaver Dam at a regular meeting held on

_____.

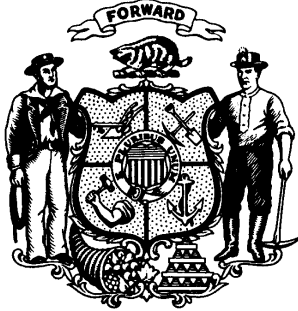
APPROVED:

By: _____
Bobbi Marck, Mayor

ATTEST:

By: _____
Tracey Ferron, City Clerk

State of Wisconsin



2025 Assembly Bill 452

Date of enactment: December 9, 2025
Date of publication*: December 10, 2025

2025 WISCONSIN ACT 68

AN ACT *to amend* 236.01, 236.11 (1) (a), 236.13 (2) (am) 1. a., 236.13 (2) (am) 3. b., 236.25 (1) and 236.45 (1); *to create* 236.105 and 236.11 (1) (d) of the statutes; **relating to:** subdivision plat approvals.

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

SECTION 1. 236.01 of the statutes is amended to read:

236.01 Purpose of chapter. The purpose of this chapter is to regulate the subdivision of land to promote public health, safety, and general welfare; to further the orderly layout and use of land; ~~to prevent the overcrowding of land; to lessen congestion in the streets and highways; to ensure that land is developed in a manner that supports healthy, livable communities; to foster the development of a range of housing types; to advance complete streets that prioritize safety, comfort, and accessibility for pedestrians, cyclists, transit riders, and motorists alike;~~ to provide for adequate light and air; to facilitate adequate provision for water, sewerage, and other public requirements; to encourage development patterns that provide safe and convenient transportation choices for a variety of users; to provide for proper ingress and egress; and to promote proper monumenting of land subdivided and conveyancing by accurate legal description. The approvals to be obtained by the subdivider as required in this chapter shall be based on requirements designed to accomplish the aforesaid purposes.

SECTION 2. 236.105 of the statutes is created to read:

236.105 Presubmission conceptual review. The municipality, town, or county that has the authority under s. 236.10 to approve a subdivision shall provide the subdivider the opportunity to meet informally with representatives of the municipality, town, or county before the subdivider submits a preliminary plat for approval, or a final plat if the subdivider does not intend to submit a preliminary plat for approval, to obtain the representatives' conceptual review of the subdivider's proposed subdivision and opinions regarding whether the subdivision complies with the municipality's, town's, or county's requirements and conditions for approving plats. Conceptual reviews and opinions provided under this section are not binding on the municipality, town, or county, or the subdivider.

SECTION 3. 236.11 (1) (a) of the statutes is amended to read:

236.11 (1) (a) Before submitting a final plat for approval, the subdivider may submit, or the approving authority may require that the subdivider submit, a preliminary plat. It shall be clearly marked "preliminary plat" and, except as provided in par. (d), shall be in sufficient detail to determine whether the final plat will meet layout requirements. ~~Within~~ Subject to par. (d), within 90 days, the approving authority, or its agent authorized to approve preliminary plats, shall take action to approve, approve conditionally, or reject the preliminary plat and

* Section 991.11, WISCONSIN STATUTES: Effective date of acts. "Every act and every portion of an act enacted by the legislature over the governor's partial veto which does not expressly prescribe the time when it takes effect shall take effect on the day after its date of publication."

shall state in writing any conditions of approval or reasons for rejection, unless the time is extended by agreement with the subdivider. Failure of the approving authority or its agent to act within the 90 days, or extension thereof, constitutes an approval of the preliminary plat.

SECTION 4. 236.11 (1) (d) of the statutes is created to read:

236.11 (1) (d) A subdivider that submits a preliminary plat for approval under par. (a) may submit preliminary, rather than final, plans and reports regarding sewer, water, road cross-sections, grading, stormwater, soil testing, landscaping, and street lighting. The approving authority, or its agent authorized to approve preliminary plats, may not reject the preliminary plat on the basis that the plans and reports are not final, but the approving authority or its agent may approve conditionally the preliminary plat on that basis and state in writing the conditions of approval as allowed under par. (a), including conditions that final plans and reports are submitted.

SECTION 5. 236.13 (2) (am) 1. a. of the statutes is amended to read:

236.13 (2) (am) 1. a. As a further condition of approval, the governing body of the town or municipality within which the subdivision lies may require that the subdivider ~~make and agree to~~ install any public improvements reasonably necessary ~~or that the subdivider and provide financial security to ensure that the subdivider will make those improvements within a reasonable time after approval. The governing body may not require that public improvements be installed or accepted as a condition of submitting, reviewing, approving, or recording of a preliminary or final plat.~~ The governing body may not require the subdivider to provide security at the commencement of a project in an amount that is more than 120 percent of the estimated total cost to complete the required public improvements, as determined under subd. 1d. Nothing in this subd. 1. a. prohibits a governing body from requiring as a condition of approval that public improvements be installed within a reasonable time after the plat is approved.

SECTION 6. 236.13 (2) (am) 3. b. of the statutes is amended to read:

236.13 (2) (am) 3. b. Upon such substantial completion, any outstanding local building permits for home sites on the plat that are related to, and dependent upon, substantial completion meet the requirements of applicable building codes, zoning ordinances, and other mu-

nicipal regulations shall be released and may not be withheld solely because of the status of public improvements.

SECTION 7. 236.25 (1) of the statutes is amended to read:

236.25 (1) The subdivider shall have the final plat recorded in the office of the register of deeds of the county in which the subdivision is located. Subject to sub. (2), a final plat that has the approvals required under s. 236.10, or that is deemed approved under s. 236.11, is entitled to be recorded. The approving authority for the plat shall make a certificate to that effect on the face of the plat no later than 10 days after the subdivider submits the plat with the certificates and affidavits required under sub. (2) (c) and (d).

SECTION 8. 236.45 (1) of the statutes is amended to read:

236.45 (1) DECLARATION OF LEGISLATIVE INTENT. The purpose of this section is to promote the public health, safety, and general welfare of the community and the regulations authorized to be made are designed ~~to lessen congestion in the streets and highways; to further the orderly layout and use of land; to secure safety from fire, panic, and other dangers; to provide adequate light and air, including access to sunlight for solar collectors and to wind for wind energy systems; to prevent the overcrowding of land; to avoid undue concentration of population;~~ to facilitate adequate provision for transportation, water, sewerage, schools, parks, playgrounds, and other public requirements; and to facilitate the further resubdivision of larger tracts into smaller parcels of land. The regulations provided for by this section shall be made with reasonable consideration, among other things, of the character of the municipality, town, or county with a view of conserving the value of the buildings placed upon land, providing the best possible environment for human habitation, and for encouraging the most appropriate use of land throughout the municipality, town, or county.

SECTION 9. Initial applicability.

(1) The treatment of ss. 236.11 (1) (a) and (d) and 236.13 (2) (am) 1. a. first applies to a plat submitted on the effective date of this subsection.

SECTION 10. Effective date.

(1) This act takes effect on the first day of the 7th month beginning after publication.

Wisconsin Legislative Council

ACT MEMO



Prepared by: Abby Gorzlaneyk, Staff Attorney

December 11, 2025

2025 Wisconsin Act 68 [2025 Assembly Bill 452]

Subdivision Plat Approval

2025 Wisconsin Act 68 makes various changes to the plat review process, including changes to the purpose and legislative intent sections of ch. 236, Stats.

Pre-Submission Review and Preliminary Plans

The act requires political subdivisions to provide a subdivider with the opportunity to meet for a nonbinding, pre-submission review. It also allows subdividers to submit preliminary plans and reports regarding water, sewer, road cross-sections, grading stormwater, soil testing, landscaping, and street lighting for review. A political subdivision cannot reject preliminary plans on the basis that the plans are preliminary, and may approve preliminary plans with written conditions.

Installation of Public Improvements

Under current law, the political subdivision may require the subdivider to make and install all public improvements reasonably necessary or provide security to ensure the subdivider will make the improvements within a reasonable time. The act instead allows political subdivisions to require the subdivider to agree to install public improvements reasonably necessary and provide financial security to ensure the improvements are made within a reasonable time after the plat is approved. It also specifies that the political subdivision may not require the installation or acceptance of public improvements as a condition to submitting, reviewing, approving, or recording a preliminary or final plat. Additionally, any outstanding local building permits for each home site on the plat that meet the requirements of applicable building codes, zoning ordinances, and other regulations must be released upon the substantial completion of the public improvements, and cannot be withheld solely due to the status of the public improvements.

Recording Plat With Register of Deeds

Lastly, the act states that a preliminary plat that has obtained the required approvals or is deemed approved is entitled to be recorded with the register of deeds. The approving authority of the body that has the authority to review the plat must make a certification of the approval on the face of the plat within 10 days of the subdivider submitting the plat with all the required certificates and affidavits.

Effective date: July 1, 2026

For a full history of the bill, visit the Legislature's [bill history page](#).

AG:jal



City of Beaver Dam, Wisconsin
City Administrator Office

TO: Common Council
FROM: Larry Bierke
SUBJECT:

The Issue:

The room tax ordinance currently in effect is outdated and inaccurate. The proposal attached updates the "use of funds" section to more accurately reflect how the City has been using said funding.

Considerations:

Many years ago, the City must have appropriated room tax dollars for economic development purposes, essentially helping to fund the Beaver Dam Development Corporation. At some point in the past, the City Council decided to fund the Development Corporation with Tax Increment dollars and reappropriate room tax money to tourism generating activities - which the state statutes do require.

Does this item have a financial or budget impact?

Yes

Without adopting this ordinance, the City would not be in compliance with state statutes. This ordinance change would redirect funding from one entity to another, if the City hadn't already taken that step many years ago. Today, this ordinance update just reaffirms what is done in practice.

Recommendation:

Staff recommends adopting the proposed ordinance change.

Attachments:

1. Ordinance 15-2026 - Room Tax
2. 06.30.26 Room Tax Ord Amendment
3. Room Tax Ordinance

ORDINANCE NO. 15-2026
CITY OF BEVAER DAM

**AN ORDINANCE AMENDING SECTION 2-124 OF THE CITY OF BEAVER DAM
MUNICIPAL CODE REGARDING ROOM TAX**

The City Council of the City of Beaver Dam, Dodge County, do ordain as follows:

SECTION I: Section 2-124(k) of the City of Beaver Dam Municipal Code is amended to read as follows:

(k) *Use of Tax Collected.* Thirty percent of all proceeds collected through the room tax shall be appropriated to the city's general fund for purposes of promoting economic development. Seventy percent of all proceeds collected shall be sequestered for the promotion of tourism and tourism development and transferred quarterly to the visitor and hospitality council of the city chamber of commerce. Such council shall annually account to the administrative committee of the city council as to the amount, appropriateness and success of its expenditures.

SECTION II: All other provisions of section 2-142 shall remain in full force and effect unless specifically modified herein.

SECTION III: Said ordinance is effective upon its passage and publication.

Presented by the members of the Administrative Committee.

First Reading August 3, 2026

Adopted: August 17, 2026

By a vote of: _____ in favor, _____ opposed, and _____ abstain.

Roberta Marck, Mayor

Tracey Ferron, City Clerk

ORDINANCE NO. [REDACTED]
CITY OF BEAVER DAM

AN ORDINANCE AMENDING SECTION 2-124 OF THE CITY OF BEAVER DAM
MUNICIPAL CODE REGARDING ROOM TAX

The City Council of the City of Beaver Dam, Dodge County, do ordain as follows:

ORDINANCE

SECTION I: Section 2-124(k) of the City of Beaver Dam Municipal Code is amended to read as follows (deletions are shown as a ~~strikethrough~~ and additions are shown with an underline):

(k) *Use of Tax Collected.* ~~Ninety percent~~ Thirty percent of all proceeds collected through the room tax shall be credited to a ~~nonlapsing economic development fund, and all undisbursed proceeds shall be carried over to each subsequent year appropriated to the city's general fund for purposes of promoting economic development.~~ Ten Seventy percent of all proceeds collected shall be sequestered for the promotion of tourism and tourism development and transferred quarterly to the visitor and hospitality council of the city chamber of commerce. Such council shall annually account to the administrative committee of the city council as to the amount, appropriateness and success of its expenditures.

SECTION II: All other provisions of section 2-142 shall remain in full force and effect unless specifically modified herein.

SECTION III: Said ordinance is effective upon its passage and publication.

The above ordinance was duly adopted by a majority vote of the elected members of the City Council of the City of Beaver Dam at a regular meeting held on

_____.

APPROVED:

By: _____
Bobbi Marck, Mayor

ATTEST:

By: _____
Tracey Ferron, City Clerk

Sec. 2-124. - Room tax.

- (a) *Definitions.* The following words, terms and phrases, when used in this section, shall have the meanings ascribed to them in this subsection, except where the context clearly indicates a different meaning:

Gross receipts means as set forth in Wis. Stats. § 77.51(4)(a), (b) and (c).

Hotel, motel and transient means as set forth in Wis. Stats. § 77.52(2)(a)1.

- (b) *Imposed.* Pursuant to Wis. Stats. § 66.0615, for the privilege of furnishing at retail rooms or lodging to transients by hotel keepers, motel operators and other persons furnishing accommodations that are available to the public, irrespective of whether membership is required for use of the accommodations, a tax is imposed upon the retailers at the rate of five percent of the gross receipts for the lease or rental of such accommodations, rooms or lodging within the city, effective January 1, 1989.
- (c) *Selective sales tax.* Any tax so imposed shall not be subject to the selective sales tax imposed by Wis. Stats. § 77.52(2)(a)1.
- (d) *Permit required.* No person subject to the tax imposed in subsection (b) of this section shall furnish rooms or lodging to transients at retail without a permit issued by the clerk.
- (e) *Application; fee.* The applicant for a permit shall file an application with the clerk on a form furnished by the clerk. A fee as listed in chapter 42 of this Code shall accompany the application.
- (f) *Payment of tax.*
- (1) The tax imposed by this section is due and payable to the city finance director on the last day of the month next succeeding the calendar quarter for which imposed. A quarterly return shall be filed with the finance director on or before the same date on which the tax is due and payable. Such return shall show the gross receipts of the preceding calendar quarter from such retail furnishing of rooms or lodging, the amount of taxes imposed for such period and such other information required by the finance director to properly collect such tax. For collecting and reporting the room tax imposed on the retailer, retailers may deduct one percent of the total room tax payable each quarterly reporting period as administrative expenses if the payment of the taxes is not delinquent. Every retailer required to file such quarterly return shall file an annual calendar year return within 90 days of the close of each calendar year.
 - (2) The annual return shall summarize the quarterly returns, reconcile and adjust for any errors in the quarterly returns and shall contain additional information if required by the finance director to determine the accuracy of the annual return. Such annual returns shall be made on forms furnished by the finance director and shall be signed by the permittee or his authorized agent.

- (g) *Interest.* All unpaid taxes shall bear interest at the rate of one percent per month or any portion thereof as in Wis. Stats. § 74.31, from the due date of the return. Failure to pay the tax or delinquent payment of such taxes shall be subject to a \$10.00 late filing penalty in addition to the interest imposed in this section.
- (h) *False or fraudulent return.* If a false or fraudulent return is filed with the intent in either case to defeat or evade the tax imposed by this section, a penalty of 50 percent of the tax due shall be paid in addition to the tax, interest and late filing penalty. Deliberate understatement of quarterly returns with correction on annual returns shall be a violation of this section.
- (i) *Enforcement.* As a means of enforcing the collection of any room tax imposed under subsection (b) of this section, the city may:
- (1) Whenever it has probable cause to believe that the correct amount of room tax has not been assessed or that the tax return is not correct, inspect and audit the financial records of any person subject to subsection (b) of this section, pertaining to the furnishing of accommodations to determine whether or not the correct amount of room tax is assessed and whether or not any room tax return is correct. Any person subject to subsection (b) of this section who fails to comply with a request to inspect and audit the person's financial records under this subsection (i)(1) shall be subject to a forfeiture of five percent of the tax determined under subsection (b) of this section or subsection (i)(2) of this section.
 - (2) Determine the tax under subsection (b) of this section according to its best judgment if any person required to make a return fails, neglects or refuses to do so for the amount in the manner and form and within the time prescribed by the city.
 - (3) Require each person who is subject to subsection (i)(2) of this section to pay an amount of taxes the city determines to be due under subsection (i)(2) of this section plus interest at the rate of one percent per month on the unpaid balance. No refund or modification of the payment determined may be granted until the person files a correct room tax return and permits the city to inspect and audit his financial records under subsection (i)(1) of this section.
 - (4) For failure to pay the tax under subsection (b) of this section, imposed a forfeiture of 25 percent of the room tax due for the previous year under subsection (b) of this section or subsection (i)(2) of this section or \$5,000, whichever is less.
- (j) *Confidentiality.* The information obtained under subsection (g) of this section shall be kept in confidence by those inspecting and auditing the financial records, unless such information is being used in the discharge of duties imposed by law, the duties of their office or by court order. Statistics classified so as not to disclose the identity of a particular return may be published. Any person convicted of violating this subsection shall pay a forfeiture of not less than \$100.00 nor more than \$500.00.
- (k)

Use of tax collected. Ninety percent of all proceeds collected through the room tax shall be credited to a nonlapsing economic development fund, and all undisbursed proceeds shall be carried over to each subsequent year. The council shall authorize all disbursements from the fund for the purposes of economic development. Ten percent of all proceeds collected shall be sequestered for the promotion of tourism and transferred quarterly to the visitor and hospitality council of the city chamber of commerce. Such council shall annually account to the administrative committee of the city council as to the amount, appropriateness and success of its expenditures. The committee may suspend payments in the event of an incomplete or unsatisfactory accounting.

- (1) No portion of the proceeds of this tax shall be used for the capital expenditures of utilities, curbs, gutters, street improvements or to buy down the cost of industrial land.
- (2) When appointments are made annually to the community development committee, an owner of a motel or hotel or a representative of that business group shall be appointed as a nonvoting member of such committee.

(Code 2001, § 3.08; Ord. No. 8-2023, § 1(Exh. A), 10-2-2023)



City of Beaver Dam, Wisconsin
Engineering Office

TO: Common Council
FROM: John Moosereiner
SUBJECT: Ordinance Amending Section 70-84, R-1 Single Family Residential District,
of the Beaver Dam Municipal Code

The Issue:

The Proposed zoning code change for new home setbacks in the single-family residential district is being introduced to better accommodate small lots in the city. Currently the city requires a front yard setback of 30 ft and a side yard setback of 8 ft for 1 ½ story homes, and a 10 ft side yard setback for 1 ½ to 2 ½ story homes. The proposed change to 25ft front yard and 7.5 ft side yard setbacks would help facilitate construction on smaller lots.

Considerations:

Does this item have a financial or budget impact?

No

Recommendation:

Staff recommends approving the Ordinance Amendment as presented.

Attachments:

1. Ordinance No. 16-2026
2. Ordinance Redline

ORDINANCE NO. 16-2026

**AN ORDINANCE AMENDING SECTION 70-84, R-1 SINGLE-FAMILY RESIDENTIAL DISTRICT,
OF THE BEAVER DAM MUNICIPAL CODE**

The City Council of the City of Beaver Dam, Dodge County, do ordain as follows:

SECTION I: **Section 70-84, R-1 Single Family Residential District**, is amended to repeal and replace paragraphs (c) and (d), to read as follows:

- (c) Side yards. There shall be a side yard of 7.5 feet on each side of a building in the R-1 district, and no single side yard shall be less than 7.5 feet.
 - (1) On a single lot having a width of less than 66 feet and of record on January 1, 1963, the sum of the widths of the side yards shall be not less than the equivalent of 3.7 inches per foot of lot width; provided, however, that the buildable width of any such lot in no case shall be reduced to less than 27 feet, nor shall the width of any single side yard be less than 50 percent of the total required side yard width.
- (d) Setback. Unless otherwise provided, there shall be a front yard setback line of not less than 25 feet in the R-1 district, provided that:
 - (1) Where 25 percent or more of the frontage is occupied with buildings having an average setback line of more or less than 30 feet, the setback line on any vacant interior lot in such frontage shall be established at the point of intersection of its centerline, drawn from the front street line, and a line connecting the nearest points on the setback lines of the next existing buildings on each side of such vacant lot.
 - (2) On corner lots less than 70 feet wide, the setback on the side street shall be not less than 80 percent of the setback required on the lot in the rear, and in no case less than 20 feet, and no accessory building shall project beyond the setback line of the lots in the rear; provided further that in no case shall the buildable width of such corner lot be reduced to less than 27 feet.

SECTION II: Said ordinance shall be effective upon its passage and publication.

Presented by the members of the Plan Commission.

First Reading – August 3, 2026

Adopted: August 17, 2026

By a vote of: _____ in favor, _____ opposed, and _____ abstain.

Roberta Marck, Mayor

Tracey Ferron, City Clerk

Sec. 70-84. R-1 single-family residential district.

- (c) *Side yards.* There shall be a side yard of 7.5 feet on each side of a building in the R-1 district and no single side yard shall be less than 7.5 feet.
- ~~(1) For buildings not over 1½ stories high, the sum of the widths of the required side yards shall not be less than 16 feet, and no single side yard shall be less than eight feet in width.~~
- ~~(2) For buildings from 1½ to 2½ stories high, the sum of the widths of the required side yards shall not be less than 20 feet, and no single side yard shall be less than ten feet in width.~~
- ~~(3)~~ (31) On a single lot having a width of less than 66 feet and of record on January 1, 1963, the sum of the widths of the side yards shall be not less than the equivalent of 3.7 inches per foot of lot width; provided, however, that the buildable width of any such lot in no case shall be reduced to less than 27 feet, nor shall the width of any single side yard be less than 50 percent of the total required side yard width.
- (d) *Setback.* Unless otherwise provided, there shall be a front yard setback line of not less than 30-25 feet in the R-1 district, provided that:
- (1) Where 25 percent or more of the frontage is occupied with buildings having an average setback line of more or less than 30 feet, the setback line on any vacant interior lot in such frontage shall be established at the point of intersection of its centerline, drawn from the front street line, and a line connecting the nearest points on the setback lines of the next existing buildings on each side of such vacant lot.
- (2) On corner lots less than 70 feet wide, the setback on the side street shall be not less than 80 percent of the setback required on the lot in the rear, and in no case less than 20 feet, and no accessory building shall project beyond the setback line of the lots in the rear; provided further that in no case shall the buildable width of such corner lot be reduced to less than 27 feet.



BEAVER DAM
Life is good
here

City of Beaver Dam, Wisconsin
Engineering Office

TO: Common Council
FROM: Todd Janssen, Jeremy Klug
SUBJECT: Complete and Final Report on Estimated Special Assessments for the 2026 Sewer Lateral & Water Service Replacement Program Project

The Issue:

Enclosed is the Complete and Final Report on Estimated Special Assessments for the 2026 Sewer Lateral & Water Service Replacement Program project. Per current City policy, property owners in the 200 and 300 blocks of East Maple Avenue and East Third Street are being assessed for the following items:

- Non-compliant sidewalks associated with private sewer/water service replacement
- Driveway aprons associated with private sewer/water service replacement
- Non-compliant private water service replacement
- Non-compliant private sanitary lateral replacement

Considerations:

As part of the City's ongoing requirement to remove and replace all lead water service lines within city limits by 2037, noncompliant sewer laterals and water services will be removed and replaced in the 200 and 300 blocks of East Maple Avenue and East Third Street in 2026.

The following schedule can be anticipated for the 2026 Sewer Lateral & Water Service Replacement Program special assessment process:

- May 4, 2026 – Operations Committee considers/approves preliminary estimated special assessments. **(completed)**
- May 18, 2026 – Common Council considers/approves preliminary estimated special assessments. **(completed)**
- June 15, 2026 – Operations Committee holds public hearing for approved preliminary estimated special assessments. **(completed)**
- July 20, 2026 – Operations Committee considers/approves final estimated special assessments. **(completed)**
- August 3, 2026 – Common Council considers/approves final estimated special assessments.
- December 2026 – Final special assessment invoices sent to property owners.

Does this item have a financial or budget impact?

No

Recommendation:

Staff recommends approval of the Resolution and Final Report on Estimated Special Assessments as presented.

Attachments:

1. Resolution No. 70-2026
2. Complete and Final Report on Estimated Special Assessments

RESOLUTION NO. 70-2026

**A RESOLUTION AUTHORIZING THE COMPLETE AND FINAL REPORT ON
ESTIMATED SPECIAL ASSESSMENTS FOR THE 2026 SEWER LATERAL &
WATER SERVICE REPLACEMENT PROGRAM PROJECT**

WHEREAS the affected property owners of the 200 and 300 blocks of East Maple Avenue and East Third Street have received notice of a hearing on the special assessments related thereto for improvements as described in Resolution 36-2026 all pursuant to Section 66.0703 Wisconsin Statutes and the findings of the Operations Committee at its May 4, 2026, and June 15, 2026 meetings.

NOW, THEREFORE, BE IT RESOLVED that the determination of the Operations Committee, as expressed in its Complete and Final Report, be and the same is hereby declared to be the final determination of the Common Council as to these matters.

RESOLVED FURTHER that the Complete and Final Report of the Operations Committee and all proceedings therein referred to and included be and the same are hereby confirmed and adopted including the Plans and Specifications for the work as on file in the Engineering Department Office.

RESOLVED FURTHER that the cost of said work shall be paid as follows: The owner of each parcel abutting on said street shall pay, as an estimate, the amount assessed in the Complete and Final Report of the Operations Committee under the title "Total Assessment".

After adoption, the Clerk shall proceed pursuant to Wisconsin Statutes Sec. 66.0703(8)(d).

Presented by the Operations Committee.

By a vote of: _____ in favor, _____ opposed, and _____ abstain.

Approved: August 3, 2026

Roberta Marck
Mayor

Attested: August 3, 2026

Tracey M Ferron
City Clerk

COMPLETE AND FINAL REPORT ON ESTIMATED SPECIAL ASSESSMENTS						PREPARED: April 29, 2026		
For: Sidewalk (Non-Compliant), Driveway Aprons, Private Water Service, and Private Sanitary Lateral						REVISED: N/A		
On: East Third Street and East Maple Avenue (200 & 300 Blocks)						Preliminary Report: Reviewed by Operations Committee, May 4, 2026		
						Final Report: Reviewed by Operations Committee, July 6, 2026		
PROPERTY OWNER AND ADDRESS	PARCEL NUMBER		NON-COMPLIANT CONCRETE SIDEWALK cost per S.F. \$9.00	NEW 6" CONCRETE DRIVEWAY APRON cost per S.Y. \$9.00		PRIVATE WATER SERVICE cost per L.F. \$3.00 \$1,115.00	PRIVATE SANITARY LATERAL cost per L.F. \$15.00 \$3,950.00 \$65.00	TOTAL ASSESSMENT ESTIMATED
East Maple Avenue: North Lincoln Avenue to North University Avenue								
KAYLA M KOHLS 204 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-039		0.00 \$0.00	45.00 \$405.00		41.00 \$1,238.00	41.00 \$4,565.00	\$6,208.00
Notes:								
MICHELLE L JOHNSON WILLIAM T JOHNSON 209 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-072		0.00 \$0.00	0.00 \$0.00		34.00 \$1,217.00	34.00 \$4,460.00	\$5,677.00
Notes:								
LOURDES LEMUS 211 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-073		0.00 \$0.00	0.00 \$0.00		56.00 \$1,283.00	56.00 \$4,790.00	\$6,073.00
Notes:								
TERRY E HEIMAN 212-1/2 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-041		25.00 \$225.00	0.00 \$0.00		52.00 \$1,271.00	52.00 \$4,730.00	\$6,226.00
Notes:								
KENNETH R VAN BEEK 216 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-042		0.00 \$0.00	0.00 \$0.00		50.00 \$1,265.00	50.00 \$4,700.00	\$5,965.00
Notes:								

COMPLETE AND FINAL REPORT ON ESTIMATED SPECIAL ASSESSMENTS								PREPARED:	April 29, 2026
For: Sidewalk (Non-Compliant), Driveway Aprons, Private Water Service, and Private Sanitary Lateral								REVISED:	N/A
On: East Third Street and East Maple Avenue (200 & 300 Blocks)								Preliminary Report: Reviewed by Operations Committee, May 4, 2026	
								Final Report: Reviewed by Operations Committee, July 6, 2026	
PROPERTY OWNER AND ADDRESS	PARCEL NUMBER		NON-COMPLIANT CONCRETE SIDEWALK cost per S.F. \$9.00	NEW 6" CONCRETE DRIVEWAY APRON cost per S.Y. \$9.00		PRIVATE WATER SERVICE cost per L.F. \$3.00 \$1,115.00	PRIVATE SANITARY LATERAL cost per L.F. \$15.00 \$3,950.00 \$65.00	TOTAL ASSESSMENT ESTIMATED	
BEAVER DAM HOMES LLC 1819 SAINT ALBERT THE GREAT DR SUN PRAIRIE, WI 53590 (Property Address: 217 E MAPLE AVE)	206-1114-0412-075		0.00 \$0.00	0.00 \$0.00		41.00 \$1,238.00	41.00 \$4,565.00	\$5,803.00	
Notes:									
PATRICK D SCHULTZ KIMBERLY A SCHULTZ 218 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-043		0.00 \$0.00	0.00 \$0.00		50.00 \$1,265.00	50.00 \$4,700.00	\$5,965.00	
Notes:									
JUSTMANN INVESTMENTS LLC 411 JEWEL ST JUNEAU, WI 53039 (Property Address: 220 E MAPLE AVE)	206-1114-0412-044		25.00 \$225.00	0.00 \$0.00		61.00 \$1,298.00	61.00 \$4,865.00	\$6,388.00	
Notes:									
TONYA M MALDONADO DIANA K UHERKA 221 E MAPLE ST BEAVER DAM, WI 53916	206-1114-0412-076		25.00 \$225.00	0.00 \$0.00		27.00 \$1,196.00	27.00 \$4,355.00	\$5,776.00	
Notes:									
LOUANN SCHMUCKI 226 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-046		0.00 \$0.00	0.00 \$0.00		32.00 \$1,211.00	32.00 \$4,430.00	\$5,641.00	
Notes:									

COMPLETE AND FINAL REPORT ON ESTIMATED SPECIAL ASSESSMENTS						PREPARED: April 29, 2026		
For: Sidewalk (Non-Compliant), Driveway Aprons, Private Water Service, and Private Sanitary Lateral						REVISED: N/A		
On: East Third Street and East Maple Avenue (200 & 300 Blocks)						Preliminary Report: Reviewed by Operations Committee, May 4, 2026		
						Final Report: Reviewed by Operations Committee, July 6, 2026		
PROPERTY OWNER AND ADDRESS	PARCEL NUMBER		NON-COMPLIANT CONCRETE SIDEWALK cost per S.F. \$9.00	NEW 6" CONCRETE DRIVEWAY APRON cost per S.Y. \$9.00		PRIVATE WATER SERVICE cost per L.F. \$3.00 \$1,115.00	PRIVATE SANITARY LATERAL cost per L.F. \$15.00 \$3,950.00 \$65.00	TOTAL ASSESSMENT ESTIMATED
CHRISTAL R DAVIDSON 230 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-047		0.00 \$0.00	0.00 \$0.00		44.00 \$1,247.00	44.00 \$4,610.00	\$5,857.00
Notes:								
GREGORY D ARMSTRONG KATHERINE M ARMSTRONG 304 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-068		0.00 \$0.00	0.00 \$0.00		56.00 \$1,283.00	56.00 \$4,790.00	\$6,073.00
Notes:								
CHRISTOPHER HENNING 306 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-067		0.00 \$0.00	0.00 \$0.00		60.00 \$1,295.00	60.00 \$4,850.00	\$6,145.00
Notes:								
BEAVER MANN LLC (C/O ZACHARY NINMANN) W2804 OAKLAWN RD NEOSHO, WI 53059 (Property Address: 314 E MAPLE AVE)	206-1114-0412-065		25.00 \$225.00	0.00 \$0.00		51.00 \$1,268.00	51.00 \$4,715.00	\$6,208.00
Notes:								
DONALD O NEUMANN JEANETTE J NEUMANN 315 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-095		0.00 \$0.00	0.00 \$0.00		32.00 \$1,211.00	32.00 \$4,430.00	\$5,641.00
Notes:								

COMPLETE AND FINAL REPORT ON ESTIMATED SPECIAL ASSESSMENTS								PREPARED:	April 29, 2026
For: Sidewalk (Non-Compliant), Driveway Aprons, Private Water Service, and Private Sanitary Lateral								REVISED:	N/A
On: East Third Street and East Maple Avenue (200 & 300 Blocks)								Preliminary Report: Reviewed by Operations Committee, May 4, 2026	
								Final Report: Reviewed by Operations Committee, July 6, 2026	
PROPERTY OWNER AND ADDRESS	PARCEL NUMBER		NON-COMPLIANT CONCRETE SIDEWALK cost per S.F. \$9.00	NEW 6" CONCRETE DRIVEWAY APRON cost per S.Y. \$9.00		PRIVATE WATER SERVICE cost per L.F. \$3.00 \$1,115.00	PRIVATE SANITARY LATERAL cost per L.F. \$15.00 \$3,950.00 \$65.00	TOTAL ASSESSMENT ESTIMATED	
FATON AHMEDI 258 SOUTH ST JUNEAU, WI 53039 (Property Address: 317 E MAPLE AVE)	206-1114-0412-096		0.00 \$0.00	0.00 \$0.00		41.00 \$1,238.00	41.00 \$4,565.00	\$5,803.00	
Notes:									
JOANN E HEINBUCH 322 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-063		0.00 \$0.00	0.00 \$0.00		39.00 \$1,232.00	39.00 \$4,535.00	\$5,767.00	
Notes:									
KRISTIN N FABISCH 327 E MAPLE AVE BEAVER DAM, WI 53916	206-1114-0412-099		25.00 \$225.00	0.00 \$0.00		44.00 \$1,247.00	44.00 \$4,610.00	\$6,082.00	
Notes:									
JOHN C LONT 109 WILLIAMS ST RANDOLPH, WI 53956 (Property Address: 114 N UNIVERSITY AVE)	206-1114-0412-099		0.00 \$0.00	0.00 \$0.00		39.00 \$1,232.00	39.00 \$4,535.00	\$5,767.00	
Notes:									
RICHARD J NEHMER 200 N UNIVERSITY AVE BEAVER DAM, WI 53916	206-1114-0412-062		0.00 \$0.00	0.00 \$0.00		53.00 \$1,274.00	53.00 \$4,745.00	\$6,019.00	
Notes:									

COMPLETE AND FINAL REPORT ON ESTIMATED SPECIAL ASSESSMENTS						PREPARED: April 29, 2026		
For: Sidewalk (Non-Compliant), Driveway Aprons, Private Water Service, and Private Sanitary Lateral						REVISED: N/A		
On: East Third Street and East Maple Avenue (200 & 300 Blocks)						Preliminary Report: Reviewed by Operations Committee, May 4, 2026		
						Final Report: Reviewed by Operations Committee, July 6, 2026		
PROPERTY OWNER AND ADDRESS	PARCEL NUMBER		NON-COMPLIANT CONCRETE SIDEWALK cost per S.F. \$9.00	NEW 6" CONCRETE DRIVEWAY APRON cost per S.Y. \$9.00		PRIVATE WATER SERVICE cost per L.F. \$3.00 \$1,115.00	PRIVATE SANITARY LATERAL cost per L.F. \$15.00 \$3,950.00 \$65.00	TOTAL ASSESSMENT ESTIMATED
East Third Street: North Lincoln Avenue to North University Avenue								
HANS A GOCHENAUR KRISTEN E GOCHENAUR 209 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-031		0.00 \$0.00	0.00 \$0.00		50.00 \$1,265.00	50.00 \$4,700.00	\$5,965.00
Notes:								
ELLEN M JAMES 942 STATE ROAD 19 MARSHALL, WI 53559 (Property Address: 215 E THIRD ST)	206-1114-0412-029		0.00 \$0.00	0.00 \$0.00		51.00 \$1,268.00	51.00 \$4,715.00	\$5,983.00
Notes:								
REED A OR SARAH C SPANG W10593 CASCADE MOUNTAIN RD PORTAGE, WI 53901 (Property Address: 216 E THIRD ST)	206-1114-0412-016		25.00 \$225.00	0.00 \$0.00		0.00 \$0.00	44.00 \$6,810.00	\$7,035.00
Notes:								
KIMBALL C MAHAL TERESSA R MAHAL 218 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-015		25.00 \$225.00	0.00 \$0.00		0.00 \$0.00	50.00 \$7,200.00	\$7,425.00
Notes:								
KATHERINE R MORITZ 220 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-014		25.00 \$225.00	0.00 \$0.00		49.00 \$1,262.00	49.00 \$4,685.00	\$6,172.00
Notes:								

COMPLETE AND FINAL REPORT ON ESTIMATED SPECIAL ASSESSMENTS								PREPARED:	April 29, 2026
For: Sidewalk (Non-Compliant), Driveway Aprons, Private Water Service, and Private Sanitary Lateral								REVISED:	N/A
On: East Third Street and East Maple Avenue (200 & 300 Blocks)								Preliminary Report: Reviewed by Operations Committee, May 4, 2026	
								Final Report: Reviewed by Operations Committee, July 6, 2026	
PROPERTY OWNER AND ADDRESS	PARCEL NUMBER		NON-COMPLIANT CONCRETE SIDEWALK cost per S.F. \$9.00	NEW 6" CONCRETE DRIVEWAY APRON cost per S.Y. \$9.00		PRIVATE WATER SERVICE cost per L.F. \$3.00 \$1,115.00	PRIVATE SANITARY LATERAL cost per L.F. \$15.00 \$3,950.00 \$65.00	TOTAL ASSESSMENT ESTIMATED	
TRAVIS A KLINE REBEKAH J KLINE 221 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-028		0.00 \$0.00	0.00 \$0.00		45.00 \$1,250.00	45.00 \$4,625.00	\$5,875.00	
Notes:									
BRIAN HARTL 223 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-027		0.00 \$0.00	0.00 \$0.00		41.00 \$1,238.00	41.00 \$4,565.00	\$5,803.00	
Notes:									
NICOLE A LANGE 212 N VITA AVE BEAVER DAM, WI 53916	206-1114-0412-025		0.00 \$0.00	0.00 \$0.00		55.00 \$1,280.00	55.00 \$4,775.00	\$6,055.00	
Notes:									
KORTNEY TABOR JEDIDIAH TABOR 303 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-050		0.00 \$0.00	0.00 \$0.00		55.00 \$1,280.00	55.00 \$4,775.00	\$6,055.00	
Notes:									
BETH MARIE GEORGE 304 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-007		0.00 \$0.00	0.00 \$0.00		42.00 \$1,241.00	42.00 \$4,580.00	\$5,821.00	
Notes:									

COMPLETE AND FINAL REPORT ON ESTIMATED SPECIAL ASSESSMENTS							PREPARED: April 29, 2026	
For: Sidewalk (Non-Compliant), Driveway Aprons, Private Water Service, and Private Sanitary Lateral							REVISED: N/A	
On: East Third Street and East Maple Avenue (200 & 300 Blocks)							Preliminary Report: Reviewed by Operations Committee, May 4, 2026	
Final Report: Reviewed by Operations Committee, July 6, 2026								
PROPERTY OWNER AND ADDRESS	PARCEL NUMBER		NON-COMPLIANT CONCRETE SIDEWALK cost per S.F. \$9.00	NEW 6" CONCRETE DRIVEWAY APRON cost per S.Y. \$9.00		PRIVATE WATER SERVICE cost per L.F. \$3.00 \$1,115.00	PRIVATE SANITARY LATERAL cost per L.F. \$15.00 \$3,950.00 \$65.00	TOTAL ASSESSMENT ESTIMATED
GEORGE C STONE ANTONIA S STONE 310 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-006		0.00 \$0.00	0.00 \$0.00		46.00 \$1,253.00	46.00 \$4,640.00	\$5,893.00
Notes:								
MARY GARRIS HAROLD GARRIS 311 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-053		0.00 \$0.00	0.00 \$0.00		56.00 \$1,283.00	56.00 \$4,790.00	\$6,073.00
Notes:								
JANEL C WISELL 312 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-005		0.00 \$0.00	0.00 \$0.00		34.00 \$1,217.00	34.00 \$4,460.00	\$5,677.00
Notes:								
JOHN L PALENO 318 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-003		0.00 \$0.00	0.00 \$0.00		43.00 \$1,244.00	43.00 \$4,595.00	\$5,839.00
Notes:								
SARAH V SOUTHWELL JOSEPH R HARRIS 319 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-055		0.00 \$0.00	0.00 \$0.00		45.00 \$1,250.00	45.00 \$4,625.00	\$5,875.00
Notes:								

COMPLETE AND FINAL REPORT ON ESTIMATED SPECIAL ASSESSMENTS						PREPARED: April 29, 2026			
For: Sidewalk (Non-Compliant), Driveway Aprons, Private Water Service, and Private Sanitary Lateral						REVISED: N/A			
On: East Third Street and East Maple Avenue (200 & 300 Blocks)						Preliminary Report: Reviewed by Operations Committee, May 4, 2026			
						Final Report: Reviewed by Operations Committee, July 6, 2026			
PROPERTY OWNER AND ADDRESS	PARCEL NUMBER		NON-COMPLIANT CONCRETE SIDEWALK cost per S.F. \$9.00	NEW 6" CONCRETE DRIVEWAY APRON cost per S.Y. \$9.00		PRIVATE WATER SERVICE cost per L.F. \$3.00 \$1,115.00	PRIVATE SANITARY LATERAL cost per L.F. \$15.00 \$3,950.00 \$65.00	TOTAL ASSESSMENT ESTIMATED	
DANIEL F RIES 321 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-056		0.00 \$0.00	0.00 \$0.00		45.00 \$1,250.00	45.00 \$4,625.00	\$5,875.00	
Notes:									
RAMON MEDINA MARIA I ESPINOZA 322 E THIRD ST BEAVER DAM, WI 53916	206-1114-0412-002		0.00 \$0.00	0.00 \$0.00		44.00 \$1,247.00	44.00 \$4,610.00	\$5,857.00	
Notes:									
PAUL FAY 214 N UNIVERSITY AVE BEAVER DAM, WI 53916	206-1114-0412-057		0.00 \$0.00	0.00 \$0.00		45.00 \$1,250.00	45.00 \$4,625.00	\$5,875.00	
Notes:									
		ESTIMATED TOTALS		\$1,800.00	\$405.00		\$45,087.00	\$180,945.00	\$228,237.00
Estimated Total Assessments		\$228,237.00	=	34.46%					
Estimated Total Project Cost		\$662,342.30							



City of Beaver Dam, Wisconsin
Engineering Office

TO: Common Council
FROM: Todd Janssen, Jeremy Klug
SUBJECT: Professional Services Agreement for Application and Administration of the 2026 Clean Water Fund Loan

The Issue:

Enclosed for approval is the Professional Services Agreement that authorizes MSA Professional Services to apply for and administer a 2026 Clean Water Fund Loan on behalf of the City of Beaver Dam.

Considerations:

The City of Beaver Dam will apply for a low interest loan through the Clean Water Fund (CWF) Loan Program to cover the cost of the East Side Sanitary Sewer Interceptor Lining project.

Does this item have a financial or budget impact?

Yes

Funds are available in the Wastewater Utility Capital Improvement Program Account.

Recommendation:

Staff recommend authorizing the Professional Services Agreement for Administration of the 2026 Clean Water Fund Loan for the lump sum fee of \$29,000.

Attachments:

1. Resolution No. 71-2026
2. Professional Services Agreement

RESOLUTION NO. 71-2026

A RESOLUTION AUTHORIZING A PROFESSIONAL SERVICES AGREEMENT FOR APPLICATION AND ADMINISTRATION OF THE 2026 CLEAN WATER FUND LOAN

WHEREAS, the City of Beaver Dam proposes to enter into a Professional Agreement with MSA Professional Services, Inc., Beaver Dam, Wisconsin, for application and administration of the 2026 Clean Water Fund Loan.

NOW, THEREFORE, BE IT RESOLVED that the City of Beaver Dam and MSA Professional Services, Inc. shall enter into a Professional Services Agreement which appropriate City officials are authorized to execute on behalf of the City of Beaver Dam for the lump sum fee of \$29,000. Funds are available in the Wastewater Utility Capital Improvement Project Account.

Presented by the Operations Committee

By a vote of: _____ in favor, _____ opposed, and _____ abstain.

Approved: August 3, 2026

Roberta Marck
Mayor

Attested: August 3, 2026

Tracey M Ferron
City Clerk

(Subject to Committee Approval)



Professional Services Agreement

MSA Project Number: 00218326

This AGREEMENT (Agreement) is made effective July 1, 2026 by and between

MSA PROFESSIONAL SERVICES, INC (MSA)

Address: 1230 South Boulevard, Baraboo, WI 53913

Phone: (608) 356-2771

Representative: Brittney Mitchell

Email: bmitchell@msa-ps.com

CITY OF BEAVER DAM (OWNER)

Address: 205 S Lincoln Ave, Beaver Dam, WI 53916

Phone: (920) 887-4600

Representative: Todd Janssen

Email: tjanssen@ci.beaverdam.wi.gov

Project Name: Beaver Dam CWF Application & Administration FY2027 East Side Interceptor

The scope of the work authorized is: See Attachment A: Scope of Services

The schedule to perform the work is: Approximate Start Date: 7/01/2026
Approximate Completion Date: 7/01/2027

The lump sum fee for the work is: \$29,000

All services shall be performed in accordance with the General Terms and Conditions of MSA, which is attached and made part of this Agreement. Any attachments or exhibits referenced in this Agreement are made part of this Agreement. Payment for these services will be on a lump sum basis.

Approval: Authorization to proceed is acknowledged by signatures of the parties to this Agreement.

CITY OF BEAVER DAM

Todd Janssen

City Engineer

Date: _____

MSA PROFESSIONAL SERVICES, INC.

Brittney Mitchell

Brittney Mitchell

Senior Team Leader Funding

Date: 07/09/2026

MSA PROFESSIONAL SERVICES, INC. (MSA)
GENERAL TERMS AND CONDITIONS OF SERVICES (PUBLIC) (rev 01/26)

1. **Scope and Fee.** The scope of Owner's Project (the "Project"), scope of MSA's services (the "Work"), for those services are defined in Attachment A. The scope and fee constitute a good faith estimate of the tasks and associated fees required to perform the services defined in Attachment A. This agreement upon execution by both parties hereto, can be amended only by written instrument signed by both parties. For those projects involving conceptual or process development service or involve renovation of an existing building or structure, activities often cannot be fully defined during initial planning. As the Project progresses, facts uncovered may reveal a change in direction which may alter the Work. MSA will promptly inform the OWNER in writing of such situations so that changes in this agreement can be made as required.

2. **Owner's Responsibilities.**

(a) Project Scope and Budget

The OWNER shall define the scope and budget of the Project and, when applicable, periodically update the Project budget, including that portion allocated for the cost of the Work. The Project budget shall include contingencies for design, development, and, when required by the scope of the Project, construction of the Project. The OWNER shall not significantly increase or decrease the overall Project scope or schedule, the portion of the budget allocated for the cost of the Work, or contingencies included in the overall budget or a portion of the budget, without the agreement of MSA to a corresponding change in the Project scope, quality, schedule, and compensation of MSA.

(b) Designated Owner Representative

The OWNER shall identify a Designated Representative who shall be authorized to act on behalf of the OWNER with respect to the Project. OWNER's Designated Representative shall render related decisions in a timely manner so as to avoid unreasonable delay in the orderly and sequential progress of MSA's services. MSA shall not be liable for any error or omission made by OWNER, OWNER's Designated Representative, or OWNER's consultant.

(c) Tests, Inspections, and Reports

When required by the scope of the Project, the OWNER shall furnish tests, inspections, and reports required by law or the Contract Documents, such as planning studies; preliminary designs; structural, mechanical, or chemical tests; tests for air, water, or soil pollution; and tests for hazardous materials.

(d) Additional Consultants

MSA's consultants shall be identified in Attachment A. The OWNER shall furnish the services of other consultants other than those designated in Attachment A, including such legal, financial, accounting, and insurance counseling services as may be required for the Project.

(e) OWNER Provided Services and Information

MSA shall be entitled to rely on the accuracy and completeness of services and information furnished by the OWNER, Designated OWNER Representative, or Consultant. MSA shall use reasonable efforts to provide prompt written notice to the OWNER if MSA becomes aware of any errors, omissions, or inconsistencies in such services or information.

3. **Billing.** MSA will bill the OWNER monthly with net payment due upon receipt. Balances due past thirty (30) days shall be subject to an interest charge at a rate of 18% per year from said thirtieth day. In addition, MSA may, after giving seven days written notice, suspend service under any agreement until the OWNER has paid in full all amounts due for services rendered and expenses incurred, including the interest charge on past due invoices.

4. **Costs and Schedules.** Costs (including MSA's fees and reimbursable expenses) and schedule commitments shall be subject to change for delays caused by the OWNER's failure to provide specified facilities or information or for delays caused by unpredictable occurrences including, without limitation, fires, floods, riots, strikes, unavailability of labor or materials, delays or defaults, by suppliers of materials or services, process shutdowns, pandemics, acts of God or the public enemy, or acts of regulations of any governmental agency. Temporary delays of services caused by any of the above which result in additional costs beyond those outlined may require renegotiation of this agreement.

5. **Access to Site.** Owner shall furnish right-of-entry on the Project site for MSA and, if the site is not owned by Owner, warrants that permission has been granted to make planned explorations pursuant to the scope of

services. MSA will take reasonable precautions to minimize damage to the site from use of equipment, but has not included costs for restoration of damage that may result and shall not be responsible for such costs.

6. **Location of Utilities.** Owner shall supply MSA with the location of all pre-existent utilities and MSA has the right to reasonably rely on all Owner supplied information. In those instances where the scope of services require MSA to locate any buried utilities, MSA shall use reasonable means to identify the location of buried utilities in the areas of subsurface exploration and shall take reasonable precautions to avoid any damage to the utilities noted. However, Owner agrees to indemnify and defend MSA in the event of damage or injury arising from damage to or interference with subsurface structures or utilities which result from inaccuracies in information of instructions which have been furnished to MSA by others.

7. **Professional Representative.** MSA intends to serve as the OWNER's professional representative for those services as defined in this agreement, and to provide advice and consultation to the OWNER as a professional. Any opinions of probable project costs, reviews and observations, and other recommendations made by MSA for the OWNER are rendered on the basis of experience and qualifications and represents the professional judgment of MSA. However, MSA cannot and does not warrant or represent that proposals, bid or actual project or construction costs will not vary from the opinion of probable cost prepared by it.

8. **Construction.** When applicable to the scope of the Project, the OWNER shall contract with a licensed and qualified Contractor for implementation of construction work utilizing a construction contract based on an EJCDC construction contract and general conditions appropriate for the scope of the Project and for the delivery method. In the construction contract, the OWNER shall use reasonable commercial efforts to require the Contractor to (1) obtain Commercial General Liability Insurance with contractual liability coverage insuring the obligation of the Contractor, and name the OWNER, MSA and its employees and consultants as additionally insureds of that policy; (2) indemnify and hold harmless the OWNER, MSA and its employees and consultants from and against any and all claims, damages, losses, and expenses ("Claims"), including but not limited to reasonable attorney's fees and economic or consequential damages arising in whole or in part out of the negligent act or omission of the contractor, and Subcontractor or anyone directly or indirectly employed by any of them. This agreement shall not be construed as giving MSA, the responsibility or authority to direct or supervise construction means, methods, techniques, sequence, or procedures of construction selected by the contractors or subcontractors or the safety precautions and programs incident to the work, the same being the sole and exclusive responsibility of the contractors or subcontractors.

9. **Standard of Care.** In conducting the services, MSA will apply present professional, engineering and/or scientific judgment, which is known as the "standard of care". The standard of care is defined as that level of skill and care ordinarily exercised by members of the same profession practicing at the same point in time and in the same or similar locality under similar circumstances in performing the Services. The OWNER acknowledges that "current professional standards" shall mean the standard for professional services, measured as of the time those services are rendered, and not according to later standards, if such later standards purport to impose a higher degree of care upon MSA.

MSA does not make any warranty or guarantee, expressed or implied, nor have any agreement or contract for services subject to the provisions of any uniform commercial code. Similarly, MSA will not accept those terms and conditions offered by the OWNER in its purchase order, requisition, or notice of authorization to proceed, except as set forth herein or expressly agreed to in writing. Written acknowledgement of receipt, or the actual performance of services subsequent to receipt of such purchase order, requisition, or notice of authorization to proceed is specifically deemed not to constitute acceptance of any terms or conditions contrary to those set forth herein.

10. **Municipal Advisor.** MSA Professional Services, Inc. is not acting as a 'Municipal Advisor' to the owner pursuant to Section 15B of the Exchange Act. For financial advice related to the corresponding project, the client is encouraged to discuss their finances with internal and/or external advisors and experts before making decisions incurring debt and/or supporting those obligations. MSA desires to serve each client well by providing the best information publicly available and is providing information as part of its engineering responsibilities to inform client options. The information is not intended to provide financial advice or recommendations and is not bound by the formal Municipal Advisor fiduciary duty.

11. **Conduct Expectations.** Owner and MSA understand their respective obligations to provide a safe, respectful work environment for their employees. Both parties agree that harassment on the job (unwelcome verbal, physical or other behavior that is related to sex, race, age, or protected class status) will not be tolerated and will be addressed timely and in compliance with anti-harassment laws.

12. Electronic Documents and Transmittals. Owner and MSA agree to transmit and accept project related correspondence, documents, text, data, drawings and the like in digital format in accordance with MSA's Electronic Data Transmittal policy. Each party is responsible for its own cybersecurity, and both parties waive the right to pursue liability against the other for any damages that occur as a direct result of electronic data sharing.

13. Building Information Modelling (BIM). For any projects, and not limited to building projects, utilizing BIM, OWNER and MSA shall agree on the appropriate level of modelling required by the project, as well as the degree to which the BIM files may be made available to any party using the Electronic Document Transmittal provisions of section 12 of this Agreement.

14. Construction Site Visits. If the scope of services includes services during the Construction Phase, MSA shall make visits to the site as specified in Attachment A– Scope of Services. MSA shall not, during such visits or as a result of such observations of Contractor's work in progress, supervise, direct or have control over Contractor's work nor shall MSA have authority over or responsibility for the means, methods, techniques, sequences or procedures of construction selected by Contractor, for safety precautions and programs incident to the work of Contractor or for any failure of Contractor to comply with laws, rules, regulations, ordinances, codes or orders applicable to Contractor's furnishing and performing the work. Accordingly, MSA neither guarantees the performance of any Contractor nor assumes responsibility for any Contractor's failure to furnish and perform its work in accordance with the Contract Documents.

15. Termination. This Agreement shall commence upon execution and shall remain in effect until terminated by either party, at such party's discretion, on not less than thirty (30) days' advance written notice. The effective date of the termination is the thirtieth day after the non-terminating party's receipt of the notice of termination. If MSA terminates the Agreement, the OWNER may, at its option, extend the terms of this Agreement to the extent necessary for MSA to complete any services that were ordered prior to the effective date of termination. If OWNER terminates this Agreement, OWNER shall pay MSA for all services performed prior to MSA's receipt of the notice of termination and for all work performed and/or expenses incurred by MSA in terminating Services begun after MSA's receipt of the termination notice. Termination hereunder shall operate to discharge only those obligations which are executory by either party on and after the effective date of termination. These General Terms and Conditions shall survive the completion of the services performed hereunder or the Termination of this Agreement for any cause.

This agreement cannot be changed or terminated orally. No waiver of compliance with any provision or condition hereof should be effective unless agreed in writing and duly executed by the parties hereto.

16. Betterment. If, due to MSA's error, any required or necessary item or component of the Project is omitted from the construction documents, MSA's liability shall be limited to the reasonable costs of correction of the construction, less what OWNER'S cost of including the omitted item or component in the original construction would have been had the item or component not been omitted. It is intended by this provision that MSA will not be responsible for any cost or expense that provides betterment, upgrade, or enhancement of the Project.

17. Hazardous Substances. OWNER acknowledges and agrees that MSA has had no role in identifying, generating, treating, storing, or disposing of hazardous substances or materials which may be present at the Project site, and MSA has not benefited from the processes that produced such hazardous substances or materials. Any hazardous substances or materials encountered by or associated with Services provided by MSA on the Project shall at no time be or become the property of MSA. MSA shall not be deemed to possess or control any hazardous substance or material at any time; arrangements for the treatment, storage, transport, or disposal of any hazardous substances or materials, which shall be made by MSA, are made solely and exclusively on OWNER's behalf for OWNER's benefit and at OWNER's direction. Nothing contained within this Agreement shall be construed or interpreted as requiring MSA to assume the status of a generator, storer, treater, or disposal facility as defined in any federal, state, or local statute, regulation, or rule governing treatment, storage, transport, and/or disposal of hazardous substances or materials.

All samples of hazardous substances, materials or contaminants are the property and responsibility of OWNER and shall be returned to OWNER at the end of a project for proper disposal. Alternate arrangements to ship such samples directly to a licensed disposal facility may be made at OWNER's request and expense and subject to this subparagraph.

18. Insurance. MSA will maintain insurance coverage for: Worker's Compensation, General Liability, and Professional Liability. MSA will provide information as to specific limits upon written request. If the OWNER requires coverages or limits in addition to those in effect as of the date of the agreement, premiums for additional

insurance shall be paid by the OWNER. The liability of MSA to the OWNER for any indemnity commitments, or for any damages arising in any way out of performance of this contract is limited to such insurance coverages and amount which MSA has in effect.

19. Reuse of Documents. Reuse of any documents and/or services pertaining to this Project by the OWNER or extensions of this Project or on any other project shall be at the OWNER's sole risk. The OWNER agrees to defend, indemnify, and hold harmless MSA for all claims, damages, and expenses including attorneys' fees and costs arising out of such reuse of the documents and/or services by the OWNER or by others acting through the OWNER.

20. Indemnification. To the fullest extent permitted by law, MSA shall indemnify and hold harmless, OWNER, and OWNER's officers, directors, members, partners, consultants, and employees (hereinafter "OWNER") from reasonable claims, costs, losses, and damages arising out of or relating to the PROJECT, provided that any such claim, cost, loss, or damage is attributable to bodily injury, sickness, disease, or death, or to injury to or destruction of tangible property (other than the Work itself) including the loss of use resulting therefrom but only to the extent caused by any negligent act or omission of MSA or MSA's officers, directors, members, partners, employees, or Consultants (hereinafter "MSA"). In no event shall this indemnity agreement apply to claims between the OWNER and MSA. This indemnity agreement applies solely to claims of third parties. Furthermore, in no event shall this indemnity agreement apply to claims that MSA is responsible for attorneys' fees. This agreement does not give rise to any duty on the part of MSA to defend the OWNER on any claim arising under this agreement.

To the fullest extent permitted by law, OWNER shall indemnify and hold harmless, MSA, and MSA's officers, directors, members, partners, consultants, and employees (hereinafter "MSA") from reasonable claims, costs, losses, and damages arising out of or relating to the PROJECT, provided that any such claim, cost, loss, or damage is attributable to bodily injury, sickness, disease, or death, or to injury to or destruction of tangible property (other than the Work itself) including the loss of use resulting therefrom but only to the extent caused by any negligent act or omission of the OWNER or the OWNER's officers, directors, members, partners, employees, or Consultants (hereinafter "OWNER"). In no event shall this indemnity agreement apply to claims between MSA and the OWNER. This indemnity agreement applies solely to claims of third parties. Furthermore, in no event shall this indemnity agreement apply to claims that the OWNER is responsible for attorneys' fees. This agreement does not give rise to any duty on the part of the OWNER to defend MSA on any claim arising under this agreement.

To the fullest extent permitted by law, MSA's total liability to OWNER and anyone claiming by, through, or under OWNER for any cost, loss or damages caused in part or by the negligence of MSA and in part by the negligence of OWNER or any other negligent entity or individual, shall not exceed the percentage share that MSA's negligence bears to the total negligence of OWNER, MSA, and all other negligent entities and individuals.

21. Accrual of Claims. To the fullest extent permitted by Laws and Regulations, all causes of action arising under this Agreement will be deemed to have accrued, and all statutory periods of limitation will commence, no later than the date of Substantial Completion; or, if MSA's services do not include Construction Phase services, or the Project is not completed, then no later than the date of Owner's last payment to MSA.

22. Dispute Resolution. OWNER and MSA desire to resolve any disputes or areas of disagreement involving the subject matter of this Agreement by a mechanism that facilitates resolution of disputes by negotiation rather than by litigation. OWNER and MSA also acknowledge that issues and problems may arise after execution of this Agreement which were not anticipated or are not resolved by specific provisions in this Agreement. Accordingly, both OWNER and MSA will endeavor to settle all controversies, claims, counterclaims, disputes, and other matters thru mediation with a mutually agreed upon mediator. Demand for mediation shall be filed in writing with the other party to this Agreement. A demand for mediation shall be made within a reasonable time after the claim, dispute or other matter in question has arisen. In no event shall the demand for mediation be made after the date when institution of legal or equitable proceedings based on such claim, dispute or other matter in question would be barred by the applicable statute of limitations. Neither demand for mediation nor any term of this Dispute Resolution clause shall prevent the filing of a legal action where failing to do so may bar the action because of the applicable statute of limitations. If despite the good faith efforts of OWNER and MSA any controversy, claim, counterclaim, dispute, or other matter is not resolved through negotiation or mediation, OWNER and MSA agree and consent that such matter may be resolved through legal action in the court having jurisdiction as specified in this Agreement.

23. **Exclusion of Special, Indirect, Consequential and Liquidated Damages.** MSA shall not be liable, in contract or tort or otherwise, for any special, indirect, consequential, or liquidated damages including specifically, but without limitation, loss of profit or revenue, loss of capital, delay damages, loss of goodwill, claim of third parties, or similar damages arising out of or connected in any way to the Project or this contract.

24. **Limitation of Liability.** Neither MSA, its Consultants (if any), nor their employees shall be jointly, severally, or individually liable to the OWNER in excess of the amount of the insurance proceeds available.

25. **Successors and Assigns.** The successors, executors, administrators, and legal representatives of Owner and MSA are hereby bound to the other party to this Agreement and to the successors, executors, administrators and legal representatives (and said assigns) of such other party, in respect of all covenants, agreements, and obligations of this Agreement. Neither party may assign, sublet, or transfer any rights under or interest (including, but without limitation, claims arising out of this Agreement or money that is due or may become due) in this Agreement without the written consent of the other party, which shall not be unreasonable withheld, except to the extent that any assignment, subletting, or transfer is mandated by law.

26. **Notices.** Any notice required under this Agreement will be in writing, and delivered: in person (by commercial courier or otherwise); by registered or certified mail; or by e-mail to the recipient, with the words "Formal Notice" or similar in the e-mail's subject line. All such notices are effective upon the date of receipt.

27. **Survival.** Subject to applicable Laws and Regulations, all express representations, waivers, indemnifications, and limitations of liability included in this Agreement will survive its completion or termination for any reason.

28. **Severability.** Any provision or part of the Agreement held to be void or unenforceable under any Laws or Regulations will be deemed stricken, and all remaining provisions will continue to be valid and binding upon Owner and MSA.

29. **No Waiver.** A party's non-enforcement of any provision will not constitute a waiver of that provision, nor will it affect the enforceability of that provision or of the remainder of this Agreement.

30. **State Law.** This agreement shall be construed and interpreted in accordance with the laws of the State in which the project is located.

31. **Jurisdiction.** OWNER hereby irrevocably submits to the jurisdiction of the state courts of the State in which the project is located for the purpose of any suit, action or other proceeding arising out of or based upon this Agreement. OWNER further consents that the venue for any legal proceedings related to this Agreement shall be in the County in which the project is located.

32. **Understanding.** This agreement contains the entire understanding between the parties on the subject matter hereof and no representations. Inducements, promises or agreements not embodied herein (unless agreed in writing duly executed) shall be of any force or effect, and this agreement supersedes any other prior understanding entered into between the parties on the subject matter hereto.

**ATTACHMENT A:
SCOPE OF SERVICES**

Scope of Services: CWFP Application, CWFP Administration, and Wage Rate Monitoring

SECTION 1: CWFP APPLICATION ASSISTANCE

1A: CWFP APPLICATION – MSA RESPONSIBILITIES

MSA agrees to assist the OWNER with loan application preparation services including the following:

1. Assess the fundability of the project using WDNR Priority Scoring as a guideline;
2. Meet with Owner to compile the necessary documentation required for a complete application (one site visit assumed);
3. Provide funding program coordination with other funds;
4. Complete Green Business Case submittals on behalf of Owner
5. Complete CWFP Application and submit on behalf of the Owner on or before the anticipated September 30th deadline (application submittal is not a guarantee of a loan award), including the following documentation:
 - Completed Clean Water Fund Application Form 8700-203 including:
 - Detailed Project Budget
 - Detailed Debt Information
 - Detailed General Municipal Info
 - Detailed User (and adjusted user) Information
 - Four Year Revenue & Expenditure Projection
 - Four Year Operation & Maintenance (O&M) Costs
 - Replacement Fund Analysis and Schedule Options
 - Detailed Info on Refinancing of Existing WW Debt
 - Facility Plan Approval Documentation (MSA or owner provided)
 - Parallel Cost Approval Documentation
 - Green Project Reserve
 - Resolution(s) as adopted by City Council
 - All MSA Contracts
 - Owner Provided Documentation including:
 - Proposed (or Actual) Intermunicipal Agreement*
 - User Charge System (current and any projected rate updates*)
 - Sewer Use Ordinance*
 - Contracts with System Users*
 - Past 2 years Municipal Budgets and Audited Financials
 - Past 2 years Sewer Utility Budgets (and Audited Financials, if separate)
 - All outstanding Sewer Revenue Bonds and Amortization Schedules
 - Latest Official Statement
 - Contracts for other Professional Services

- Information on Other Funding Sources*
 - Debt Instrument to Be Refinanced (Interim Financing Document/Note)
 - Bidding Documentation (if available at time of application)*
6. Work with the Owner and the WDNR to compile the necessary documentation required for CWFP post-application submittals

SECTION 2: CWFP Loan Administration

MSA agrees to assist the OWNER with loan administration services including the following:

1. Work with the Owner and the WDNR to compile the necessary documentation required for CWFP loan closing(s):
 - Updated budget(s) to include all costs for loans
 - DBE compliance and all bidding documentation for project(s)
 - All award documentation and executed construction contract(s) for project(s)
 - Updated construction schedule
 - Disbursement request, along with all corresponding invoices
 - Use of American Iron and Steel Certification (if applicable)
 - Build America Buy America Certification (if applicable)
 - WDNR Form 8700-201 Federal Equivalency Projects Assurances and Certification if needed
 - Ensure DNR has all corresponding Plan and Spec Approval letters for project
 - Final documentation of Green Project Reserve as needed
 - Proof of final user charge adoption for sewer rates (if necessary)
 - Intermunicipal Agreement (if applicable)
 - Title and Deed, and cashed check for any applicable land purchase
 - Statement of Payoff amount (if project has interim financing)
 - Legal Opinion from Village attorney regarding 20-year ownership of all land involved in project(s)
 - Facilitate any necessary coordination between other funding sources to allow CWFP to correctly understand all funding sources and amounts listed on project budgets.
2. Provide administrative services as required after loan closings. Establish and maintain CWFP Administration Files
 - Application files and required documentation
 - Financial Assistance Agreement contracts
 - Financial management/disbursements
 - Environmental review
 - Change Orders and Misc. Purchases (as approved by DNR)
 - Project closeout file
 - General correspondence files
 - Labor standards files (see above for detail regarding monitoring)
3. Work with the Owner and the WDNR through loan close-out at the end of the project.

SECTION 3: Provide Federal Labor Standards Monitoring for Construction Project(s)

1. Serve as Labor Standards Officer on behalf of Owner
2. Secure/utilize current federal wage rate schedules, per CWFP requirements
3. Include (or provide for inclusion if requested) all applicable federal labor standards information in all bidding specifications and contract documents
4. Conduct required pre-construction conference and review wage requirements, funding processes and procedures, and payment procedures per all funding agencies as it relates to construction
5. Assist Owner with on-the-job employee interviews (HUD Form 11) and compare interviews to payrolls received; follow up on discrepancies between interviews and payroll documents
6. Review contractor & all sub-contractor payroll records for Davis-Bacon wage rate compliance on a weekly basis during construction:
 - a. Verify signed Certificate of Compliance attached to Payroll report
 - b. Verify that payroll reports include the following:
 - i. Name and Address of employees
 - ii. Employee Identification number
 - iii. Federal classification
 - iv. Base wage hourly amount
 - v. Fringe benefit hourly amount
 - vi. Standard Deductions
 - vii. Other Deductions (with explanations)
 - viii. Identified Apprentice(s) and current level in certified program
 - c. Verify receipt of required attachments to the payrolls:
 - i. Union Wage Sheet, or Documentation of Approved Fringe Plan(s), i.e. name, address, phone number, and frequency of deposit on behalf of employees
 - ii. Authorization of "Other" deductions, i.e. Child Support orders, signed plan/insurance/savings enrollment sheets
 - iii. Apprentice Contracts and corresponding Union Contract including ratios of journeymen to apprentices

Assist Owner in resolving labor standards compliance issues



City of Beaver Dam, Wisconsin
Engineering Office

TO: Common Council
FROM: Todd Janssen, Jeremy Klug
SUBJECT: Official Intent to Reimburse Expenditures

The Issue:

The City of Beaver Dam is planning to submit a funding application for the Clean Water Fund Program (i.e., DNR EIF Funds) in 2026 for the East Side Sanitary Sewer Interceptor Lining Project. This Resolution confirms that the City will utilize interim financing sources for the referenced project until the DNR EIF Funds become available, at which time the DNR EIF Funds will reimburse expenditures made by such.

Considerations:

Note that the City of Beaver Dam is eligible for both low interest loan and principal forgiveness through the Clean Water Fund Program. The City is currently eligible to receive an interest rate of 2.365% which is 55% of the market rate and is a fixed rate for the life of the loan (20 years). The City of Beaver Dam is also currently eligible for 10% principal forgiveness on the entire project, including engineering invoices.

Does this item have a financial or budget impact?

Yes

Interim financing funds are available in the Wastewater Utility Capital Improvement Program Account.

Recommendation:

Staff recommend approving the Resolution Declaring Official Intent to Reimburse Expenditures as presented.

Attachments:

1. Resolution No. 72-2026

RESOLUTION NO. 72-2026

RESOLUTION DECLARING OFFICIAL INTENT TO REIMBURSE EXPENDITURES

WHEREAS, the City of Beaver Dam, Dodge County, Wisconsin (“the City”) plans to make improvements to the East Side Sanitary Sewer Interceptor, and other related facilities (“the Project”); and

WHEREAS, the City expects to borrow funds and incur debt from one or more possible sources on a long-term basis by issuing tax-exempt bonds, promissory notes, DNR EIF Funds, or other ‘debt’ to finance the Project (“the Loan”); and

WHEREAS, because proceeds of the debt which will provide project financing will not become available prior to commencement of the Project, the City may need to provide interim financing to cover costs of the Project incurred prior to receipt of the Loan; or other debt proceeds; and

WHEREAS, it is necessary, desirable, and in the best interests of the City to use moneys from its funds on an interim basis until the Loan becomes available.

NOW, THEREFORE, BE IT RESOLVED, by the Common Council of the City of Beaver Dam, Dodge County, Wisconsin, that:

Section 1. Expenditure of Funds. The City shall make expenditures as needed from its funds to pay the costs of the Project until loan proceeds become available.

Section 2. Declaration of Official Intent. The Council of the City of Beaver Dam hereby officially declares its intent under 26 CFR Section 1.150-2 to reimburse said expenditures with proceeds of the debt, the principal amount of which is not expected to exceed \$9,000,000.

Section 3. Effective Date. This Resolution shall become effective upon its adoption and approval.

Presented by the Operations Committee

By a vote of _____ in favor, _____ opposed, and _____ abstain.

Approved: August 3, 2026

Roberta Marck
Mayor

Attested: August 3, 2026

Tracey M Ferron
City Clerk

(Subject to Committee Approval)



City of Beaver Dam, Wisconsin
City Administrator Office

TO: Common Council
FROM: Larry Konopacki
SUBJECT:

The Issue:

The City of Beaver Dam issued forgivable loans to Heritage Mall in 2021 and 2024. The terms of those agreements have been met so far. However, the property is scheduled to be sold. The ownership group selling the mall is taking a significant loss on their investment in order to sell the property. Please read the resolution attached for more details.

Considerations:

Does this item have a financial or budget impact?

Yes

Undetermined.

By Adopting this resolution, the City is releasing the current property owners from their forgivable loan commitments. Since the loans were forgivable over time, if the projects are successful the City will not be repaid for these loans. The only ways that the City would receive payment on these loans would be if the property were sold at a price above the thresholds described in the Resolution, or if the tenants of the property ceased operations in the Mall.

The most recent total loan balance for both loans is \$642,000.00 of the original combined total loan amount of \$980,000.00. The anticipated reduction in the loan balances (10% of each loan forgiven each year) is as follows:

Today through Sept 30 - \$642,000.00

On Oct 1 of each of the following years:

2026 - \$544,000.00

2027 - \$446,000.00

2028 - \$348,000.00

2029 - \$250,000.00

2030 - \$152,000.00

2031 - \$54,000.00

2032 - \$36,000.00

2033 - \$18,000.00
2034 - \$0

Recommendation:

Staff are asking the City Council to consider the terms of the initial development agreements met and whether they are willing to forgive the remainder of the loan in order to facilitate the transfer of the property to a new owner.

Attachments:

1. Resolution No. 73-2026
2. 20.06.15 Developers Agreement - SIGNED
3. 24.04.15 Developers Agreement - SIGNED
4. 24.10.10 First Amendment Developers Agreement - SIGNED

RESOLUTION NO. 73-2026

A RESOLUTION AUTHORIZING TERMINATION OF DEVELOPMENT AGREEMENTS AND FORGIVEABLE MORTGAGES FOR HERITAGE VILLAGE MALL

WHEREAS, the City previously entered into development agreements with 1645 N. Spring St., LLC, a Wisconsin limited liability company (“Heritage Mall”), dated June 15, 2020, and April 15, 2024, as amended (collectively the “Development Agreements”);

WHEREAS, under each of the Development Agreements, Heritage Mall was provided with a forgivable loan from the City to complete certain improvements to the Heritage Mall property to attract and retain particular tenants;

WHEREAS, under the terms of each of the forgivable loans provided by the City, Heritage Mall is obligated to repay the remaining balance of the City’s forgivable loan if the Heritage Mall property is sold within five years of the City’s disbursement of loan funds and the sale proceeds exceed the stated threshold (\$10 million in the 2020 Development Agreement; \$13 million in the 2024 Development Agreement);

WHEREAS, the Development Agreements also provide for Minimum Tax Payments for a period of ten (10) years after occupancy and actual property tax payments have exceeded such minimum requirements at all times since execution of the Development Agreements;

WHEREAS, the Development Agreements require that the Heritage Mall property remain taxable until the termination of TID #8 (August 20, 2038) and the Heritage Mall property has remained taxable at all times since the execution of the Development Agreements;

WHEREAS, the City holds a mortgage on the property under both Development Agreements that remains until the forgivable loan is fully forgiven or released;

WHEREAS, if the terms of the forgivable loans and the Development Agreements are met, the City expects the entire balance of the forgivable loans to be forgiven and for the City to receive no reimbursement for such forgivable loans.

WHEREAS, the improvements contemplated in the Development Agreements have been completed and the targeted tenants for the Mall have located in the Mall.

WHEREAS, the forgivable mortgages and other protections for the City contained in the Development Agreements were intended to ensure that the owners of the Heritage Mall did not realize a windfall upon sale of the property after receiving public funding to support the Heritage Mall.

WHEREAS, three of the original partners owning the Heritage Mall have passed in recent years and the ownership group has reported that they can no longer continue to invest and operate the Heritage Mall at a loss.

WHEREAS, the owners of Heritage Mall now seek to sell the property for less than \$8,500,000.00, which they report is significantly below the amount of their current loan on the property and therefore will represent significant financial losses to themselves and to their lender, and is significantly lower than the sale price above which repayment of any forgivable loan balance would be required as described above;

WHEREAS, the City Council has determined that the sale of the Heritage Mall to a new owner at a price that better reflects the actual value of the property will best promote investment in and the future financial success of the Heritage Mall property;

WHEREAS, as a condition of purchase of the Heritage Mall property, the prospective buyer seeks to take title to the property free and clear of the above-described obligations;

NOW, THEREFORE, BE IT HEREBY RESOLVED that the City Council of the City of Beaver Dam authorizes the City Administrator to execute such documents and take further actions as necessary to terminate the Development Agreements and record a satisfaction of mortgage for each of the forgivable loans applicable to the Heritage Mall.

By a vote of: _____ in favor, _____ opposed, and _____ abstain.

Approved: August 3, 2026

Roberta Marck
Mayor

Attested: August 3, 2026

Tracey M Ferron
City Clerk

DEVELOPMENT AGREEMENT

This Development Agreement is entered into as of the 15 day of June, 2020 (the "**Development Agreement**"), by and between the City of Beaver Dam, Wisconsin, a municipal corporation (the "**City**"), and 1645 N. Spring St., LLC (the "**Developer**").

RECITALS

WHEREAS, the Developer is the owner of real property and improvements commonly known as the Heritage Village Mall, 1645 North Spring Street, in the City of Beaver Dam, Wisconsin, being City tax parcels 206-1214-2733-003 and 206-1214-2733-020 as shown on the attached Exhibit A (the "**Property**"); and

WHEREAS, the Developer desires to re-develop a portion of the Property identified as City Tax Parcel 206-1214-2733-020 on the attached Exhibit A and also known as the former Boston Store (the "**Development Property**"); and

WHEREAS, on August 20, 2018, the City established Tax Incremental Financing District #8 ("**TIF #8**"), the boundaries of which include the Development Property; and

WHEREAS, the Developer has negotiated ten (10) year lease agreements with commercial retailers Marshalls of MA, Inc. ("**Marshalls**") and Ross Dress For Less, Inc. ("**Ross**"); and

WHEREAS, the Developer is in the process of negotiating an additional five (5) year lease with commercial retailer Five Below, Inc. ("**Five Below**"); and

WHEREAS, said lease agreements will require Developer to renovate the Development Property in the form of a build-out and parking lot improvements to create usable commercial space for Marshalls and Ross and if necessary Five Below (the "**Project**"); and

WHEREAS, the City has determined that the Project is likely to enhance significantly the value of the Property and the other property within TIF #8 in accordance with Section 66.1105(4)(gm)(4)(a)-(b) of the Wisconsin Statutes; and

WHEREAS, in order to improve TIF #8, the City desires to encourage and facilitate the Project by offering an incentive to the Developer in the form of a Forgivable loan, all as more particularly set forth below. The Forgivable loan offer will expire if the Project is not substantially completed (evidenced by City issued occupancy permit) by July 1, 2021.

NOW THEREFORE, in consideration of the promises and mutual obligations of the parties hereto, it is agreed as follows:

I. CONDITIONS OF DEVELOPMENT

All parties' obligations to consummate the transactions that are contemplated by this Agreement shall be subject to satisfaction of the following conditions:

- a) Developer Obligations. The Developer shall:
 - i) Prepare and obtain City approval for plans and specifications for the Project (the “**Plans**”).
 - ii) Present to the Director of Administration a minimum of three (3) construction bids for the Project (the “**Bids**”).
 - iii) Complete the Project on or before July 1, 2021 as evidenced by an occupancy permit granted by the City.
 - iv) None of the provisions contained in this Agreement shall release the Developer from its obligations to secure all required project permits and approvals for the Project.
 - v) Secure such financing as is necessary to undertake the Project.
 - vi) The Developer’s obligations under this Agreement shall be binding upon all heirs, successors, and assigns of the Developer.
- b) City Obligations. The City shall:
 - i) Review and approve the Plans in the City’s reasonable discretion and in accordance with the City’s policies and procedures.

II. SPECIFIC DEVELOPER COVENANTS

The City’s willingness to provide the Forgivable Loan (defined below) is predicated in part upon the Developer agreeing to undertake, construct and maintain the Project on the Development Property. In this regard, the Developer covenants and agrees that:

- a) Developer shall commence construction of the Project after the satisfaction of conditions set forth in Section I above and shall incur build out and parking lot improvement costs in the total amount of approximately three million dollars (\$3,000,000) to accommodate commercial retailers Marshalls and Ross or four million dollars (\$4,000,000) in the event an additional lease agreement is finalized with commercial retailer Five Below (the “**Development Costs**”).
- b) Developer, at a minimum, shall pay property taxes to the City on an annual basis based on state statute. The afore mentioned minimum property tax payment shall be calculated using the base value of the Property at the time of the creation of TIF #8 multiplied by the Total 2019 Assessed Mill rate for the City of Beaver Dam (the “**Minimum Tax Payment**”) listed on Exhibit B.
- c) Beginning in the first taxable year after the issuance of an occupancy permit for the Project, and for ten (10) years thereafter (the “**Payment Period**”), to the extent the property taxes due and payable with respect to the Project in respect of any calendar year

are less than the Minimum Tax Payment a tax shortfall shall exist (“**Tax Shortfall**”). Developer shall then make an additional payment to the City equal to any such Tax Shortfall, which additional payment shall be due on the due date(s) for property taxes. City and Developer agree that Developer’s obligation to make such Tax Shortfall payments constitutes additional consideration for the City’s willingness to provide the Forgivable Loan described in Section III hereof. It is understood however, that Developer shall be responsible for paying either the Minimum Tax Payment or property taxes as calculated on an annual basis based on state statute, whichever is higher.

III. SPECIFIC CITY COVENANTS

The Developer’s willingness to construct the Project in accordance with the Plans is predicated in part upon the City agreeing to provide the Forgivable Loan. In this regard, the City covenants and agrees that:

- a) Forgivable Loan.
 - i) City acknowledges and agrees that the Development Costs to be paid for by Developer under Section II(a) above are costs necessary to make the Development Property suitable for lease by Marshalls and Ross and if necessary Five Below and in consideration for the Developer’s covenants and agreements set forth in Section II above, the City hereby agrees to provide a Forgivable Loan to the Developer (the “**Forgivable Loan**”) to provide the Developer with funding for a portion of the Development Costs incurred by Developer in connection with the Development. The Forgivable Loan shall be made as provided in Subsections ii - vii below.
 - ii) Following completion of the Project and upon the issuance of an occupancy permit for the Development Property, the City shall provide a Forgivable Loan to the Developer in an amount equal to twenty percent (20%) of documented Project costs to accommodate Marshalls and Ross or \$600,000 whichever is less. In the event an additional lease agreement is finalized with commercial retailer Five Below the City shall provide a Forgivable Loan to the Developer in an amount equal to twenty percent (20%) of documented Project costs or \$800,000 whichever is less. Developer shall present documentation of Project costs to the Director of Administration for review prior to calculation of Forgivable loan amount.
 - iii) Forgivable Loan terms shall be zero percent (0%) interest rate; no payments of principle or interest during the term of the loan and a single balloon payment due ten (10) years after loan closing. Said balloon payment amount shall be determined in accordance with Subsection iv below. Other terms and conditions as detailed in the Mortgage Note shall also apply.
 - iv) The principal balance due on the loan referenced in Subsection ii above shall be reduced by ten percent (10%) each year commercial tenants Marshalls and Ross remain in business in the Development Property (five percent (5%) each for Marshalls and Ross). In the event a lease agreement is finalized with commercial retailer Five Below the principal balance due on the loan referenced in Subsection ii

above shall be reduced by ten percent (10%) each year commercial tenants Marshalls, Ross and Five Below remain in business in the Development Property (three and one third percent (3.33%) each for Marshalls, Ross and Five Below)

- v) In the event Development Property or any portion thereof is sold within five (5) years of the City funding the Forgivable Loan and the proceeds from said sale exceed ten million dollars (\$10,000,000) Developer shall immediately repay the principle balance then due in accordance with Subsection iv above.
- vi) The Forgivable Loan will be made to the Developer pursuant to the Mortgage Note attached as Exhibit C (the "Mortgage Note")
- vii) In order to provide a form of security to the City for Developer's Mortgage Note Developer shall execute and deliver to the City the Mortgage in substantially the form in Exhibit D (the "Mortgage"). The City agrees that any interest it has in the Development Property created by the Mortgage shall be subordinate to any mortgage now existing or hereafter created securing any first mortgage lender, whether to a construction financing lender or permanent financing lender and to any and all replacement mortgages securing a replacement mortgage loan. The City agrees that it will upon reasonable request of Developer confirm the foregoing subordination in writing.

IV. INDEMNIFICATION AND HOLD HARMLESS AGREEMENT

Developer shall indemnify and hold the City harmless against any and all liability, loss, charges, costs or expenses sustained, incurred or required to be paid as a result of the Developer's willful misconduct or negligent acts or the willful misconduct or negligent acts of its architects, engineers, employees or agents while acting under and pursuant to this Agreement. City shall indemnify and hold the Developer harmless against any and all liability, loss, charges, costs or expenses sustained, incurred or required to be paid as a result of the City's willful misconduct or negligent acts or the willful misconduct or negligent acts of its architects, engineers, employees or agents while acting under and pursuant to this Agreement.

V. DEFAULT

A. In the event of any default in or breach of this Agreement or any of its terms or conditions by either party hereto or any successor in interest to such party, such party or successor shall have the right to cure or remedy such default or breach within thirty (30) days of written notice thereof, unless a longer term is specified or unless such default or breach requires more than the payment of money to cure and cannot reasonably be cured or remedied within such thirty (30)-day period, in which case no default or breach shall be deemed to exist if the party alleged to be in default commences to cure within such thirty (30) days of written notice thereof and takes, and continues to take, such reasonable action to cure such alleged default thereafter. In case such action is not taken or is not pursued as described in the previous sentence, the aggrieved party may institute such proceedings as may be necessary or desirable in its opinion to cure the default of breach including, but not limited to, proceedings to compel specific

performance by the party in default or breach of its obligation. Any delay by either party in instituting or prosecuting any such actions or proceedings or otherwise asserting its rights under this section, shall not operate as a waiver of such rights, or deprive it of, or to limit such rights in any way.

B. The Developer shall not be considered in breach or default of its obligations with respect to the beginning and completion of construction of the Development or progress in respect thereto in the event of delay in the performance of such obligations due to unforeseeable causes beyond its control and without its fault or negligence, including but not restricted to acts of God, acts of the public enemy, acts of the federal government, fires, floods, epidemics, unforeseen site conditions, strikes, embargos and unusually severe weather or delays of subcontractors due to such causes, it being the purpose and intent of this provision in the event of such an occurrence, the times and performance of any of the obligations of Developer with respect to construction of the Development shall be extended for the period of the forced delay.

VI. NOTICES

All notices, demands certificates or other communications under this Agreement shall be sufficiently given or delivered if it is dispatched by registered or certified mail, postage pre-paid or delivered personally to the parties at their addresses as follows:

City: City of Beaver Dam, Wisconsin
Attn: Director of Administration
205 South Lincoln Avenue
Beaver Dam, WI 53916

CC: City Attorney

Developer: 1645 N. Spring Street, LLC
Attn: Todd Hedberg
718 Park Avenue
Beaver Dam, WI 53916

VII. TERMINATION

This Agreement and all obligations of the parties hereunder shall terminate upon the earlier of the agreement of the parties, or the expiration of the Payment Period or the mandatory TIF District #8 termination date of August 20, 2038.

VIII. MISCELLANEOUS

The Recitals are hereby incorporated into the Agreement by reference. This Agreement is binding upon and for the benefit of the parties hereto and their respective successors and assigns. The Developer shall not assign its rights under this Agreement prior to the completion of the Development without the prior written consent of the City, which consent shall not be unreasonably withheld. The Agreement shall be governed by the laws of the state of Wisconsin.

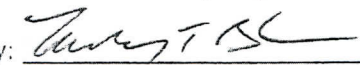
IX. SEVERABILITY

If any term or provision of this Agreement is held to be illegal, invalid, or unenforceable, the legality, validity, or enforceability of the remaining terms or provisions of this Agreement shall not be affected thereby; and in lieu of such illegal, invalid, or unenforceable term or provision, there shall be added automatically to this Agreement, a legal, valid, or enforceable term or provision, as similar as possible to the term or provision declared illegal, invalid, or unenforceable.

IN WITNESS WHEREOF, The parties have caused this Agreement to be executed as of the date first above written, dated this 15 day of June, 2020.

CITY OF BEAVER DAM, WISCONSIN

By: 
Rebecca E. Glewen, Mayor

By: 
Zachary T. Bloom, Director of Administration/
Clerk

1645 N. SPRING STREET, LLC

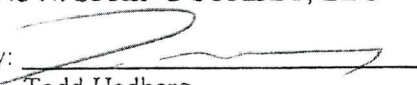
By: 
Todd Hedberg

EXHIBIT A - MAP OF PROPERTY

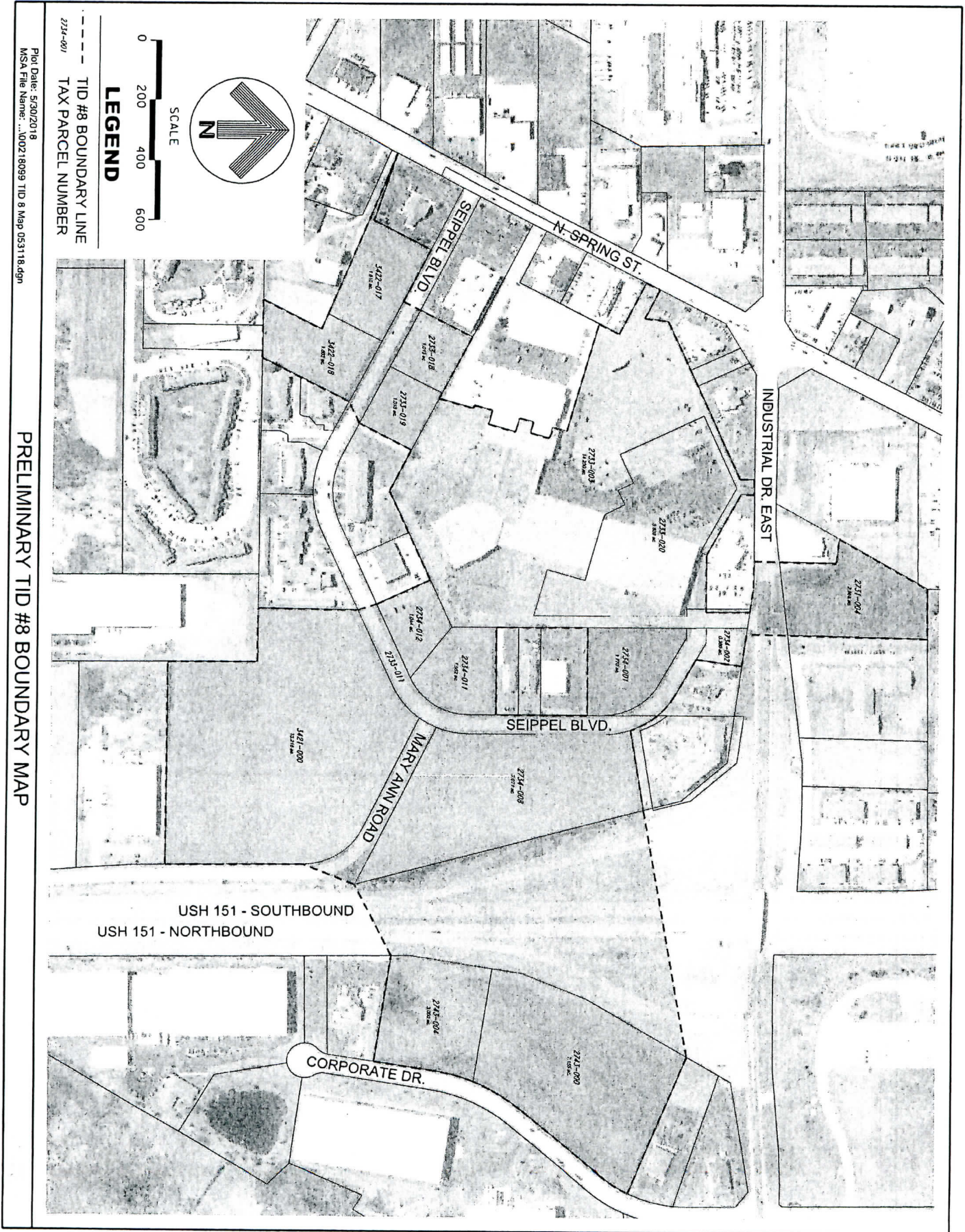


EXHIBIT B - MINIMUM TAX PAYMENT CALCULATION

Heritage Mall - Former Boston Store Minimum Tax Payment Calculation

Parcel 206-1214-2733-020

(Former Boston Store)

Land Value	\$	706,100
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Improvement Value	\$	1,675,900
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Parcel 206-1214-2733-003

(Staples/Dunhams/Shoe
Sensation/JoAnn Fabrics)

Land Value	\$	1,309,400
------------	----	-----------

Improvement Value	\$	1,849,000
-------------------	----	-----------

Total Taxable Base Value	\$	<u>5,540,400</u>
--------------------------	----	------------------

2019 Assessed Tax Rate		<u>0.021376</u>
------------------------	--	-----------------

Minimum Tax Payment	\$	<u>118,432</u>
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EXHIBIT C - MORTGAGE NOTE

MORTGAGE NOTE

\$ _____, 2021

FOR VALUE RECEIVED, the undersigned, 1645 N. Spring St., LLC, a Wisconsin Limited Liability Company, with an address of 1645 N. Spring Street, Beaver Dam, Wisconsin, 53916 (the "Maker"), promises to pay to the order of the City of Beaver Dam, a political subdivision of the State of Wisconsin (the "City"), at its principal office at Beaver Dam City Hall, 205 South Lincoln Avenue, Beaver Dam, Wisconsin 53916 or such other place as the holder hereof may designate in writing in immediately available funds, the principal sum as calculated in accordance with the attached development agreement in one installment on _____, 2031 plus interest on the outstanding principal amount at the rate of 0% per annum through maturity.

Full or partial payment of this Note is permitted at any time without penalty. This Note is secured by a Mortgage on Maker's property executed as of the date hereof. If any installment is not paid when due, Holder may provide written notice thereof to Maker. Maker shall have ninety (90) days after receipt of such notice to cure such default and if Maker fails to cure the unpaid balance shall, at the option of Holder, and without further notice mature and become immediately payable. The unpaid balance shall automatically mature and become immediately payable in the event Maker becomes a subject of bankruptcy or other insolvency proceedings. Receipt by Holder of any payment on this Note after the occurrence of any event of default shall not constitute a waiver of the default of Holder's right and remedies upon such default. In the event of such default, interest shall accrue on the unpaid balance at the rate of 8.0% per annum and such interest shall continue to accrue until the unpaid balance, including accrued interest is paid in full. Maker agrees to pay all reasonable costs of collection before and after judgment including reasonable attorney's fees and hereby expressly waives presentment, protest, demand, and Notice of Dishonor.

This Note and the related Mortgage may not be assigned to, or assumed by, a third party without the prior written consent of the Holder of this Note.

IN WITNESS WHEREOF, Maker has signed, sealed, and delivered this Note as of the day and year first above written.

1645 N. SPRING STREET, LLC

By: _____

Attest: _____

(CORPORATE SEAL)

State Bar of Wisconsin Form 21-2003
MORTGAGE

Document Name

See attached map and legal description.

This is not a purchase money mortgage.
~~X is~~ (is not)

otherwise agree in writing, insurance proceeds shall be applied to restoration or repair of the Property damaged, provided Mortgagee deems the restoration or repair to be economically feasible.

e. **OTHER COVENANTS.** Mortgagor covenants not to commit waste nor suffer waste to be committed on the Property, to keep the Property in good condition and repair, to keep the Property free from future liens superior to the lien of this Mortgage and to comply with all laws, ordinances and regulations affecting the Property. Mortgagor shall pay when due all indebtedness which may be or become secured at any time by a mortgage or other lien on the Property superior to this Mortgage and any failure to do so shall constitute a default under this Mortgage.

2. **DEFAULT AND REMEDIES.** Mortgagor agrees that time is of the essence with respect to payment of principal and interest when due, and in the performance of the terms, conditions and covenants contained herein or in the Obligation secured hereby. In the event of default, Mortgagee may, at its option, declare the whole amount of the unpaid principal and accrued interest due and payable, and collect it in a suit at law or by foreclosure of this Mortgage or by the exercise of any other remedy available at law or equity. If this Mortgage is subordinate to a superior mortgage lien, a default under the superior mortgage lien constitutes a default under this Mortgage.

3. **NOTICE.** Unless otherwise provided in the Obligation secured by this Mortgage, prior to any acceleration (other than under paragraph 9, below) Mortgagee shall mail notice to Mortgagor specifying: (a) the default; (b) the action required to cure the default; (c) a date, not less than 15 days from the date the notice is mailed to Mortgagor by which date the default must be cured; and (d) that failure to cure the default on or before the date specified in the notice may result in acceleration.

4. **EXPENSES AND ATTORNEY FEES.** In case of default, whether abated or not, all costs and expenses, including, but not limited to, reasonable attorney fees, to the extent not prohibited by law shall be added to the principal, become due as incurred, and in the event of foreclosure be included in the judgment.

5. **FORECLOSURE WITHOUT DEFICIENCY.** Mortgagor agrees to the provisions of Sections 846.101 and 846.103, Wis. Stats., as may apply to the Property and as may be amended, permitting Mortgagee in the event of foreclosure to waive the right to judgment for deficiency and hold the foreclosure sale within the time provided in such applicable Section.

6. **RECEIVER.** Upon default or during the pendency of any action to foreclose this Mortgage, Mortgagor consents to the appointment of a receiver of the Property, including homestead interest, to collect the rents, issues and profits of the Property during the pendency of such an action, and such rents, issues and profits when so collected shall be held and applied as the court shall direct.

7. **WAIVER.** Mortgagee may waive any default without waiving any other subsequent or prior default by Mortgagor.

8. **MORTGAGEE MAY CURE DEFAULTS.** In the event of any default by Mortgagor of any kind under this Mortgage or any Obligation secured by this Mortgage, Mortgagee may cure the default and all sums paid by Mortgagee for such purpose shall immediately be repaid by Mortgagor with interest at the rate then in effect under the Obligation secured by this Mortgage and shall constitute a lien upon the Property.

9. **CONSENT REQUIRED FOR TRANSFER.** Mortgagor shall not transfer, sell or convey any legal or equitable interest in the Property (by deed, land contract, option, long-term lease or in any other way) without the prior written consent of Mortgagee, unless either the indebtedness secured by this Mortgage is first paid in full or the interest conveyed is a mortgage or other security interest in the Property, ~~subordinate to the lien of this Mortgage.~~ ~~XXXXXXXXXXXXXXXXXXXXXXXXXXXX~~ The entire indebtedness under the Obligation secured by this Mortgage shall become due and payable in full at the option of Mortgagee without notice, which notice is hereby waived, upon any transfer, sale or conveyance made in violation of this paragraph. A violation of the provisions of this paragraph will be considered a default under the terms of this Mortgage and the Obligation it secures.

10. **ASSIGNMENT OF RENTS.** Mortgagor hereby transfers and assigns absolutely to Mortgagee, as additional security, all rents, issues and profits which become or remain due (under any form of agreement for use or occupancy of the Property or any portion thereof), or which were previously collected and remain subject to Mortgagor's control following any default under this Mortgage or the Obligation secured hereby and delivery of notice of exercise of this assignment by Mortgagee to the tenant or other user(s) of the Property in accordance with the provisions of Section 708.11, Wis. Stats., as may be amended. This assignment shall be enforceable with or without appointment of a receiver and regardless of Mortgagee's lack of possession of the Property.

11. **ENVIRONMENTAL PROVISION.** Mortgagor represents, warrants and covenants to Mortgagee that (a) during the period of Mortgagor's ownership or use of the Property no substance has been, is or will be present, used, stored, deposited, treated, recycled or disposed of on, under, in or about the Property in a form, quantity or manner which if known to be present on, under, in or about the Property would require clean-up, removal or other remedial action ("Hazardous Substance") under any federal, state or local laws, regulations, ordinances, codes or rules ("Environmental Laws"); (b) Mortgagor has no knowledge, after due inquiry, of any prior use or existence of any Hazardous Substance on the Property by any prior owner of or person using the Property; (c) without limiting the generality of the foregoing, Mortgagor has no knowledge, after due inquiry, that the Property contains asbestos, polychlorinated biphenyl components ("PCBs") or underground storage tanks; (d) there are no conditions existing currently or likely to exist during the term of this Mortgage which would subject Mortgagor to any damages, penalties, injunctive relief or clean-up costs in any governmental or regulatory action or third-party claims relating to any Hazardous Substance; (e) Mortgagor is not subject to any court or administrative proceeding, judgment, decree, order or citation relating to any Hazardous Substance; and (f) Mortgagor in the past has been, at the present is and in the future will remain in compliance with all Environmental Laws. Mortgagor shall indemnify and hold harmless Mortgagee from all loss, cost (including reasonable attorney fees and legal expenses), liability and damage whatsoever directly or indirectly resulting from, arising out of or based upon (i) the presence, use, storage, deposit, treatment, recycling or disposal, at any time, of any Hazardous Substance on, under, in or about the Property, or the transportation of any Hazardous Substance to or from the Property, (ii) the violation or alleged violation of any Environmental Law, permit, judgment or license relating to the presence, use, storage, deposit, treatment, recycling or disposal of any Hazardous Substance on, under, in or about the Property, or the transportation of any Hazardous Substance to or from the Property, or (iii) the imposition of any governmental lien for the recovery of environmental clean-up costs expended under any Environmental Law. Mortgagor shall immediately notify Mortgagee in writing of any governmental or regulatory action or third-party claim instituted or threatened in connection with any Hazardous Substance on, in, under or about the Property.

~~12. **SECURITY INTEREST ON FIXTURES.** To further secure the payment and performance of the Obligation, Mortgagor hereby grants to Mortgagee a security interest in:~~

- ~~**CHOOSE ONE OF THE FOLLOWING OPTIONS; IF NEITHER IS CHOSEN, OPTION A SHALL APPLY:**~~
- ~~☐ A. All fixtures and personal property located on or related to the operations of the Property whether now owned or hereafter acquired.~~
 - ~~☐ B. All property listed on the attached schedule.~~

~~This Mortgage shall constitute a security agreement within the meaning of the Uniform Commercial Code with respect to those parts of the Property indicated above. This Mortgage constitutes a fixture filing and financing statement as those terms are used in the Uniform Commercial Code. This Mortgage is to be filed and recorded in the real estate records of the county in which the Property is located, and the following information is included: (1) Mortgagor shall be deemed the "debtor"; (2) Mortgagee shall be deemed to be the "secured party" and shall have all of the rights of a secured party under the Uniform Commercial Code; (3) this Mortgage covers goods which are or are to become fixtures; (4) the name of the record owner of the land is the debtor; (5) the legal name and address of the debtor are _____ ;~~

~~(6) the state of organization and the organizational identification number of the debtor (if applicable) are _____ ; and~~

~~(7) the address of the secured party is _____ .~~

13. **SINGULAR; PLURAL.** As used herein, the singular shall include the plural and any gender shall include all genders.

LEGAL DESCRIPTION:

Lot 2 of Certified Survey Map No. 6351 as recorded in Volume 43 of Certified Surveys on Page 54 in the Dodge County Register of Deeds Office; said lands being part of the South ½ of the Southwest ¼, Section 27, Town 12 North, Range 14 East, City of Beaver Dam, Dodge County, Wisconsin.

PIN #206-1214-2733-020
5.839 Acres

1645 N. Spring Street
Beaver Dam, WI 53916

173

Chris Plansch

CHRIS PLANSCH - Registrar
Fee Amount: \$15.00
Total Pages 3



MSA

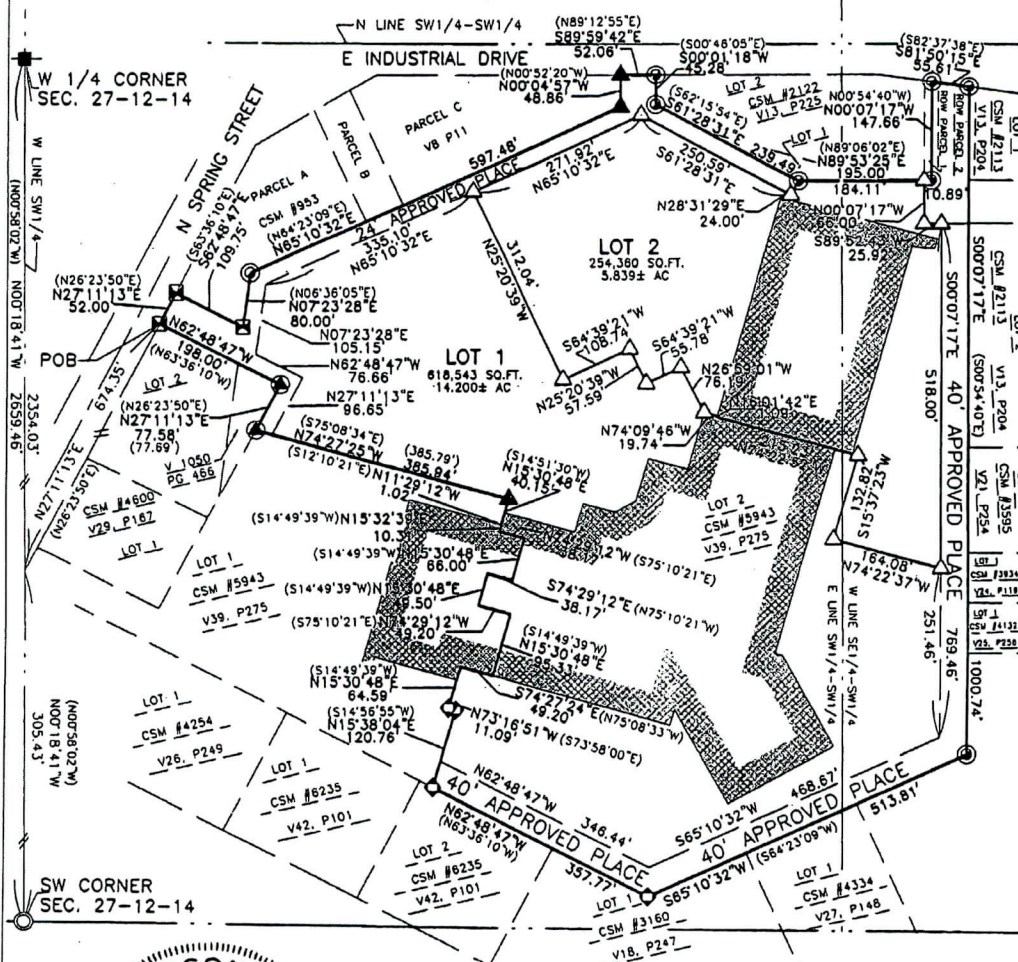
PROFESSIONAL SERVICES

TRANSPORTATION • MUNICIPAL
DEVELOPMENT • ENVIRONMENTAL
201 Corporate Drive, Beaver Dam, WI 53916
920-887-4242 1-800-552-6330 Fax: 920-887-4250
Web Address: www.msa-ps.com
© MSA PROFESSIONAL SERVICES

PROJECT # 11012000	OWNER:
DRAWN BY: A Cook	1645 N Spring Street, LLC
SURVEYOR: D Steinkraus	(Heritage Mall)
FILE # csm 1.dwg	Beaver Dam, WI 53916
SHEET # 1 of 3	

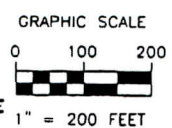
DODGE COUNTY CERTIFIED SURVEY MAP # 6351

A RESURVEY OF LOT 2 OF CERTIFIED SURVEY MAP NO. 5943 AS RECORDED IN VOLUME 39 OF CERTIFIED SURVEYS ON PAGES 275 AND 276 IN THE DODGE COUNTY REGISTER OF DEEDS; SAID LANDS BEING PART OF THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 AND PART OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4, SECTION 27, TOWN 12 NORTH, RANGE 14 EAST, CITY OF BEAVER DAM, DODGE COUNTY, WISCONSIN.



WISCONSIN
DENNIS G. STEINKRAUS
S-1609
BEAVER DAM
WISCONSIN
LAND SURVEYOR
12-14-08

- LEGEND
- FD. GOVERNMENT MONUMENT
 - FOUND CUT CROSS IN CONC.
 - FOUND LIMESTONE MON.
 - FOUND 1" IRON PIPE
 - FOUND IRON REBAR
 - FOUND RAILROAD SPIKE
 - FOUND "PK" NAIL
 - SET "PK" NAIL
 - RECORD INFORMATION



BEARINGS REFERENCED TO THE DODGE COUNTY COORDINATE SYSTEM

v43r054



PROFESSIONAL SERVICES

TRANSPORTATION • MUNICIPAL
DEVELOPMENT • ENVIRONMENTAL
201 Corporate Drive, Beaver Dam, WI 53916
920-887-4242 1-800-552-6330 Fax: 920-887-4250
Web Address: www.msa-ps.com
© MSA PROFESSIONAL SERVICES

PROJECT # 11012000

DRAWN BY: A Cook

CHECKED BY: D Steinkraus

FILE # csm 1.dwg

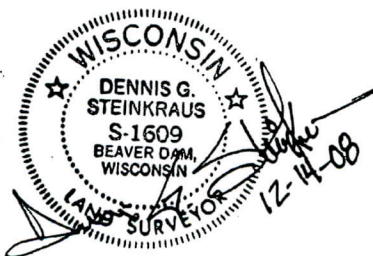
SHEET # 2 of 3

DODGE COUNTY CERTIFIED SURVEY MAP # 6351

I, Dennis G. Steinkraus, Registered Land Surveyor of the State of Wisconsin, do hereby certify that by order of Mr. Todd Hedberg, agent for 1645 North Spring Street, LLC, owner, I have made a resurvey of Lot 2 of Certified Survey Map No. 5943 (CSM 5943) as recorded in Volume 39 of Certified Surveys on Pages 275 and 276 in the Dodge County Register of Deeds Office; said lands being part of the Southwest 1/4 of the Southwest 1/4 and part of the Southeast 1/4 of the Southwest 1/4, Section 27, Town 12 North, Range 14 East, City of Beaver Dam, Dodge County, Wisconsin; being more particularly described as follows:

COMMENCING at the Southwest corner of said Section 27; thence, along the West line of said Southwest 1/4, N00°18'41"W, 305.43 feet to the Easterly right-of-way line of N. Spring Street; thence, along said Easterly right-of-way line, N27°11'13"E, 674.35 feet to the Northerly most corner of Lot 2 of Certified Survey Map No. 4600 (CSM 4600) as recorded in Volume 29 of Certified Surveys on Page 167 in said Register of Deeds, said point being also a Westerly corner of said Lot 2 of CSM 5943 and the POINT OF BEGINNING of lands to be described; thence, along the boundary of said Lot 2 of CSM 5943 the following courses:

1. along said Easterly right-of-way line of N. Spring Street, N27°11'13"E, 52.00 feet to the Westerly most corner of Parcel A of Certified Survey Map No. 953 (CSM 953) as recorded in Volume 8 of Certified Surveys on Page 11 in said Register of Deeds;
2. thence, along the Southwesterly line of said Parcel A, S62°48'47"E, 109.75 feet to the Southerly most corner of said Parcel A;
3. thence, along the Easterly line of said Parcel A, N07°23'28"E, 80.00 feet to an Easterly corner of said Parcel A;
4. thence, along the Southeasterly line of said Parcel A and Parcels B and C of said CSM 953, N65°10'32"E, 597.48 feet to the Southeast corner of said Parcel C;
5. thence, along the East line of said Parcel C, N00°04'57"W, 48.86 feet to the Northeast corner of said Parcel C and the Southerly right-of-way line of E. Industrial Drive;
6. thence, along said Southerly right-of-way line, S89°59'42"E, 52.06 feet to the Northwest corner of Lot 2 of Certified Survey Map No. 2122 (CSM 2122) as recorded in said Volume 13 of Certified Surveys on Page 225 in said Register of Deeds;
7. thence, along the West line of said Lot 2 of CSM 2122, S00°01'18"W, 45.28 feet to a Southerly corner of said Lot 2 of CSM 2122;
8. thence, along the Southerly line of said Lot 2 and the Southerly line of Lot 1 of said CSM 2122, S61°28'31"E, 239.49 feet to a Southerly corner of said Lot 1;
9. thence, continuing along said Southerly line of Lots 1 and 2 of CSM 2122 and the South line of lands dedicated as ROW Parcel No. 1 on Certified Survey Map No. 2113 (CSM 2113) as recorded in Volume 13 of Certified Surveys on Page 204, N89°53'25"E, 195.00 feet to the Southeast corner of said ROW Parcel No. 1 of said CSM 2113;
10. thence, along the East line of said ROW Parcel No. 1 of CSM 2113, N00°07'17"W, 147.66 feet to the Southerly right-of-way line of East Industrial Drive;
11. thence, along said Southerly right-of-way line, S81°50'15"E, 55.61 feet to the East line of ROW Parcel No. 2 of said CSM 2113;
12. thence, along the East line of said ROW Parcel No. 2 of CSM 2113 and the West line of Lots 1 and 2 of said CSM 2113, also along the West line of Lot 1 of Certified Survey Map No. 3595 as recorded in Volume 21 of Certified Surveys on Page 254, the West line of Lot 1 of Certified Survey Map No. 3934 as recorded in volume 24 of Certified Surveys on Page 119 and the West line of Lot 1 of Certified Survey Map No. 4132 as recorded in Volume 25 of Certified Surveys on Page 256 in said Register of Deeds and its extension, S00°07'17"E, 1000.74 feet;
13. thence, along the Northerly line of Lot 1 of Certified Survey Map No. 4334 as recorded in Volume 27 of Certified Surveys on Page 148 in said Register of Deeds and the Northerly line of Lot 1 of Certified Survey Map No. 3160 (CSM 3160) as recorded in Volume 18 of Certified Surveys on Page 247 in said Register of Deeds and their extension, S65°10'32"W, 513.81 feet to a Northerly corner of said CSM 3160 being also the Southerly most corner of said Lot 2 of CSM 5943;
14. thence, continuing along a Northerly line of said Lot 1 of CSM 3160 and the Northerly line of Lot 2 of Certified Survey Map No. 6235 as recorded in Volume 42 of Certified Surveys on Page 101 in said Register of Deeds, N62°48'47"W, 357.77 feet to the Southerly most corner of Lot 1 of said CSM 5943;
15. thence, along the East line of said Lot 1 of CSM 5943 being also the West line of said Lot 2 of CSM 5943, N15°38'04"W, 120.76 feet; thence, N73°16'51"W, 11.09 feet; thence, N15°30'48"E, 64.59 feet; thence, S74°27'24"E, 49.20 feet; thence, N15°30'48"E, 95.33 feet; thence, N74°29'12"W, 49.20 feet; thence, N15°30'48"E, 49.50 feet; thence, S74°29'12"E, 38.17 feet; thence, N15°30'48"E, 66.00 feet; thence, N74°29'12"W, 38.17 feet; thence, N15°32'39"E, 10.31 feet; thence, N11°29'12"W, 1.02 feet; thence, N15°30'48"E, 40.15 feet; to the Northeast corner of said Lot 1 of CSM 5943;
16. thence, along the North line of said Lot 1 of CSM 5943, N74°27'25"W, 385.94 feet to the Northwest corner of said Lot 1 of CSM 5943 and the East line of lands described in Volume 1050 of Records on Page 466 in said Register of Deeds;
17. thence, along the Easterly line of said Volume 1050, Page 466, N27°11'13"E, 77.58 feet to the Northeast corner of said Volume 1050, Page 466;
18. thence, along the Northerly line of said Volume 1050, Page 466 and the Northerly line of Lot 2 of said CSM 4600), N62°48'47"W, 198.00 feet to the Westerly most corner of said Lot 2 of CSM 5943, the Northerly most corner of said Lot 2 of CSM 4600, the Easterly right-of-way line of North Spring Street and the POINT OF BEGINNING.



Said parcel contains 872,903 square feet or 20.039 total acres, more or less. Lot 1

Bearings referenced to the Dodge County Coordinate System and shown to bear N00°18'41"W along the West line of the Southwest 1/4 of Section 27-12-14.

I further certify that this map is a correct representation of all of the exterior boundaries of the land surveyed and the division of that land; that I have complied with the provisions of Chapter 236.34 of the Wisconsin State Statutes and the City of Beaver Dam Subdivision Control Ordinance in surveying and mapping the same.

v43p055

MSA

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201 Corporate Drive, Beaver Dam, WI 53916
920-887-4242 1-800-552-6330 Fax: 920-887-4250
Web Address: www.msa-ps.com
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PROJECT # 11012000

DRAWN BY: A Cook

CHECKED BY: D Steinkraus

FILE # csm 1.dwg

SHEET # 3 of 3

DODGE COUNTY CERTIFIED SURVEY MAP # 6351

A RESURVEY OF LOT 2 OF CERTIFIED SURVEY MAP NO. 5943 AS RECORDED IN VOLUME 39 OF CERTIFIED SURVEYS ON PAGES 275 AND 276 IN THE DODGE COUNTY REGISTER OF DEEDS; SAID LANDS BEING PART OF THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 AND PART OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4, SECTION 27, TOWN 12 NORTH, RANGE 14 EAST. CITY OF BEAVER DAM, DODGE COUNTY, WISCONSIN.

OWNER'S CERTIFICATE

I, the undersigned, agent for owner, of the above named property, our heirs and assigns, forever adopt the Restrictive Covenants Applicable to Zero (0) Lot Line Conditional Use, of the City of Beaver Dam, Wisconsin as recorded in Volume 605 of Records on Page 111 to 114 in the Dodge County Register of Deeds Office. Dated this 30th day of DECEMBER, 2008.

Each party acknowledges that although the easements which each enjoys over privately owned lots one of the effects of same is to provide public access to each of the respective lots and as such each lot would be considered served by public frontage onto an approved place pursuant to Section 70-2 of the Beaver Dam Municipal Code.

Todd Hedberg
Todd Hedberg, agent
1645 N SPRING STREET, LLC

STATE OF WISCONSIN)
DODGE COUNTY)ss

Personally came before me this 30th day of December, 2008, the above named Todd Hedberg, agent for 1645 N SPRING STREET, LLC., to be known to be the person who executed the foregoing instrument and acknowledge the same.

Trisha R. Pieper
Notary Public, State of Wisconsin
My Commission March 22, 2009



CITY APPROVAL

APPROVED by the City of Beaver Dam this
15 day of DECEMBER, 2008.

Thomas A. Kennedy, Mayor

SURVEYOR'S SEAL



v43P056

DEVELOPMENT AGREEMENT

This Development Agreement is entered into as of the 15 day of April, 2024 (the “**Development Agreement**”), by and between the City of Beaver Dam, Wisconsin, a municipal corporation (the “**City**”), and 1645 N. Spring St., LLC (the “**Developer**”).

RECITALS

WHEREAS, the Developer is the owner of real property and improvements commonly known as the Heritage Village Mall, 1645 North Spring Street, in the City of Beaver Dam, Wisconsin, being City tax parcels 206-1214-2733-003 and 206-1214-2733-020 as shown on the attached Exhibit A (the “**Property**”); and

WHEREAS, the Developer desires to re-develop a portion of the Property identified as City Tax Parcel 206-1214-2733-003 on the attached Exhibit A (the “**Development Property**”); and

WHEREAS, on August 20, 2018, the City established Tax Incremental Financing District #8 (“**TID #8**”) and approved a Project Plan for the District, the boundaries of which include the Development Property; and

WHEREAS, the Developer has negotiated ten (10) year lease agreements with commercial retailer Harbor Freight Tools USA, Inc. (“**Harbor Freight**”); and

WHEREAS, said lease agreement will require Developer to renovate the Development Property in the form of a build-out and parking lot improvements to create usable commercial space for Harbor Freight (the “**Project**”); and

WHEREAS, the City has determined that the Project is likely to enhance significantly the value of the Property and the other property within TID #8 in accordance with Section 66.1105(4)(gm)4.(a)-(b) of the Wisconsin Statutes; and

WHEREAS, the City finds and determines that unless the City provides the incentives described in this Agreement, Developer will not develop the Property, and the City will not accomplish the objectives of the Project Plan for the District; and

WHEREAS, the City finds that the renovation of the Property and the fulfillment of the terms and conditions of this Agreement are in the vital and best interests of the City and its residents including because the Project will eliminate blight and preserve and expand City tax base and create new jobs in the City, thereby serving public purposes in accordance with state and local law; and

WHEREAS, the City requires a development agreement to facilitate development of the Project; and

WHEREAS, as an inducement to Developer to renovate the Property and otherwise facilitate the renovation of the Property, to make the renovation financially feasible, and to implement the Project Plan for the District, the City finds it appropriate to offer an incentive to the Developer in the form of a Forgivable loan, all as more particularly set forth below. The Forgivable loan offer will expire if the Project is not substantially completed (evidenced by City issued occupancy permit) by January 1, 2025.

NOW THEREFORE, in consideration of the promises and mutual promises, obligations, and benefits of the parties hereto, the receipt and adequacy of which are hereby acknowledged, Developer and the City agree as follows:

I. CONDITIONS OF DEVELOPMENT

All parties' obligations to consummate the transactions that are contemplated by this Agreement shall be subject to satisfaction of the following conditions:

- a) Developer Obligations. The Developer shall:
 - i) Prepare and obtain City approval for plans and specifications for the Project (the "**Plans**").
 - ii) Present to the City a minimum of three (3) construction bids for each of the portions of the work to be completed by a separate subcontractor for the Project (the "**Bids**").
 - iii) Subject to Section V.(b), complete the Project on or before July 1, 2024 as evidenced by the issuance of an occupancy permit granted by the City.
 - iv) Secure all required project permits and approvals for the Project.
 - v) Secure such financing as is necessary to undertake the Project.
- b) City Obligations. The City shall:
 - i) Review and approve the Plans in the City's reasonable discretion and in accordance with the City's policies and procedures.

II. SPECIFIC DEVELOPER COVENANTS

The City's willingness to provide the Forgivable Loan (defined below) is predicated in part upon the Developer agreeing to undertake, construct and maintain the Project on the Development Property. In this regard, the Developer covenants and agrees that:

- a) Developer shall commence construction of the Project after the satisfaction of conditions set forth in Section I above and shall incur build out and parking lot

improvement costs in the total amount of approximately nine hundred thousand dollars (\$900,000) to accommodate commercial retailers Harbor Freight (the “**Development Costs**”).

- b) Developer, at a minimum, shall pay property taxes to the City on an annual basis based on state statute. The afore mentioned minimum property tax payment shall be calculated using the base value of the Property as listed on Exhibit B multiplied by the Total 2019 Assessed Mill rate for the City of Beaver Dam (the “**Minimum Tax Payment**”) listed on Exhibit B.
- c) Beginning in the first taxable year after the issuance of an occupancy permit for the Project, and for ten (10) years thereafter (the “**Payment Period**”), to the extent the property taxes due and payable with respect to the Project in respect of any calendar year are less than the Minimum Tax Payment, a tax shortfall shall exist (“**Tax Shortfall**”). Developer shall then make an additional payment to the City equal to any such Tax Shortfall, which additional payment shall be due on the due date(s) for property taxes. City and Developer agree that Developer’s obligation to make such Tax Shortfall payments constitutes additional consideration for the City’s willingness to provide the Forgivable Loan described in Section III hereof. It is understood however, that Developer shall be responsible for paying either the Minimum Tax Payment or property taxes as calculated on an annual basis based on state statute, whichever is higher.
- d) The Developer’s obligations under this Agreement shall be binding upon all heirs, successors, and assigns of the Developer.
- e) Prior to this Agreement having force or effect, Developer shall execute and deliver to the City for recording with the Dodge County Register of Deeds the Tax Agreement incorporated herein as Exhibit C.

III. SPECIFIC CITY COVENANTS

The Developer’s willingness to construct the Project in accordance with the Plans is predicated in part upon the City agreeing to provide the Forgivable Loan. In this regard, the City covenants and agrees that:

- a) Forgivable Loan.
 - i) City acknowledges and agrees that the Development Costs to be paid for by Developer under Section II(a) above are costs necessary to make the Development Property suitable for lease by Harbor Freight and in consideration for the Developer’s covenants and agreements set forth in Section II above, the City hereby agrees to provide a Forgivable Loan to the Developer (the “**Forgivable Loan**”) to provide the Developer with funding for

a portion of the Development Costs incurred by Developer in connection with the Development. The Forgivable Loan shall be made as provided in Subsections ii - vii below.

- ii) Following completion of the Project and upon the issuance of an occupancy permit for the Development Property, the City shall provide a Forgivable Loan to the Developer in an amount equal to twenty percent (20%) of documented Project costs to accommodate Harbor Freight or one hundred and eighty thousand dollars (\$180,000.00) whichever is less. Developer shall present documentation of Project costs to the City for review prior to calculation of Forgivable Loan amount.
- iii) Forgivable Loan terms shall be zero percent (0%) interest rate; no payments of principle or interest during the term of the loan and a single balloon payment due ten (10) years after loan closing. Said balloon payment amount shall be determined in accordance with Subsection iv below. Other terms and conditions as detailed in the Mortgage Note shall also apply.
- iv) Unless the principle balance is forgiven earlier by the City, the principal balance due on the loan referenced in Subsection ii above shall be reduced by ten percent (10%) each year commercial tenant Harbor Freight remains in business in the Development Property and the Developer is not in breach of this Agreement.
- v) In the event Development Property or any portion thereof is sold within five (5) years of the City funding the Forgivable Loan and the proceeds from said sale exceed thirteen million dollars (\$13,000,000.00) Developer shall immediately repay the principle balance then due in accordance with Subsection iv above.
- vi) The Forgivable Loan will be made to the Developer pursuant to the Mortgage Note attached as Exhibit D (the "Mortgage Note")
- vii) In order to provide a form of security to the City for Developer's Mortgage Note, Developer shall execute and deliver to the City the Mortgage in substantially the form in Exhibit E (the "Mortgage"). The City agrees that any interest it has in the Development Property created by the Mortgage shall be subordinate to any mortgage now existing or hereafter created securing any first mortgage lender, whether to a construction financing lender or permanent financing lender and to any and all replacement mortgages securing a replacement mortgage loan. The City agrees that it will upon reasonable request of Developer confirm the foregoing subordination in writing.

IV. INDEMNIFICATION AND HOLD HARMLESS AGREEMENT

Developer shall indemnify and hold the City harmless against any and all liability, loss, charges, costs or expenses sustained, incurred or required to be paid as a result of the Developer's willful misconduct or negligent acts or the willful misconduct or negligent acts of its architects, engineers, employees or agents while acting under and pursuant to this Agreement.

V. DEFAULT

- a) In the event of any default in or breach of this Agreement or any of its terms or conditions by either party hereto or any successor in interest to such party, such party or successor shall have the right to cure or remedy such default or breach within thirty (30) days of written notice thereof, unless a longer term is specified or unless such default or breach requires more than the payment of money to cure and cannot reasonably be cured or remedied within such thirty (30)-day period, in which case no default or breach shall be deemed to exist if the party alleged to be in default commences to cure within such thirty (30) days of written notice thereof and takes, and continues to take, such reasonable action to cure such alleged default thereafter. In case such action is not taken or is not pursued as described in the previous sentence, the aggrieved party may institute such proceedings as may be necessary or desirable in its opinion to cure the default of breach including, but not limited to, proceedings to compel specific performance by the party in default or breach of its obligation. Any delay by either party in instituting or prosecuting any such actions or proceedings or otherwise asserting its rights under this section, shall not operate as a waiver of such rights, or deprive it of, or to limit such rights in any way. For avoidance of doubt, each party's applicable Conditions of Development under Section I. are conditions precedent for the obligations of the parties under this Agreement to vest; therefore, failure of a Party to perform its Conditions of Development does not constitute a breach of this Agreement and such failure is not subject to this paragraph.
- b) If the Developer is delayed with respect to the beginning and completion of construction of the Development or progress in respect thereto due to unforeseeable causes beyond its control and without its fault or negligence, including but not restricted to acts of God, acts of the public enemy, acts of the federal government, fires, floods, epidemics, unforeseen site conditions, strikes, embargos and unusually severe weather or delays of subcontractors due to such causes, Developer's obligation to complete the Development under Section I.(a)(iii.) shall be extended only for the period of the forced delay, but under no circumstances may the Development be completed no later than December 31, 2024.

VI. NOTICES

All notices, demands certificates or other communications under this Agreement shall be sufficiently given or delivered if it is dispatched by registered or certified mail, postage pre-paid or delivered personally to the parties at their addresses as follows:

City: City of Beaver Dam, Wisconsin
Attn: City Administrator
205 South Lincoln Avenue
Beaver Dam, WI 53916

CC: City Attorney

Developer: 1645 N. Spring Street, LLC
Attn: Todd Hedberg
718 Park Avenue
Beaver Dam, WI 53916

VII. TERMINATION

This Agreement and all obligations of the parties hereunder shall terminate upon the earlier of the agreement of the parties, or the expiration of the Payment Period.

VIII. MISCELLANEOUS

The Recitals are hereby incorporated into the Agreement by reference. This Agreement is binding upon and for the benefit of the parties hereto and their respective successors and assigns. The Developer shall not assign its rights under this Agreement prior to the completion of the Development without the prior written consent of the City, which consent shall not be unreasonably withheld. The Agreement shall be governed by the laws of the state of Wisconsin.

The City may record a copy of this Agreement, or a memorandum thereof, in the office of the Dodge County Register of Deeds. Developer shall pay the costs of any such recording.

IX. SEVERABILITY

If any term or provision of this Agreement is held to be illegal, invalid, or unenforceable, the legality, validity, or enforceability of the remaining terms or provisions of this Agreement shall not be affected thereby; and in lieu of such illegal, invalid, or unenforceable term or provision, there shall be added automatically to this Agreement, a legal, valid, or enforceable term or provision, as similar as possible to the term or provision declared illegal, invalid, or unenforceable.

IN WITNESS WHEREOF, The parties have caused this Agreement to be executed as of the date first above written, dated this 15 day of April, 2024.

CITY OF BEAVER DAM, WISCONSIN

By: Michael Wissell
(Title) Michael Wissell, Mayor

By: Tracey Ferron
Tracey Ferron, City Clerk

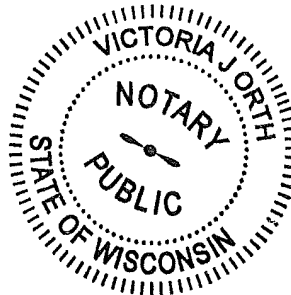
STATE OF WISCONSIN

COUNTY OF DODGE

Personally came before me this 15th day of April, 2024, the above-named Michael Wissell, Tracey Ferron, and _____, _____, of the City of Beaver Dam, to me known to be the persons and officers who executed the foregoing instrument and acknowledged that they executed the same as such officers by the City's authority.

Subscribed and sworn to before me
This 15th day of April, 2024.

Victoria Orth
Notary Public, State of Wisconsin
Print Name: Victoria Orth
My Commission: Nov. 26, 2027



1645 N. SPRING STREET, LLC

By: [Signature]
Todd Hedberg

STATE OF WISCONSIN

COUNTY OF Dodge

Personally came before me this 15th day of April, 2024 the above
named Todd Hedberg to me known to be the person who executed the
foregoing instrument and acknowledged the same.

Subscribed and sworn to before me
This 15th day of April, 2024.

[Signature]
Notary Public, State of Wisconsin
Print Name: Victoria J Orth
My Commission: 11/26/2027

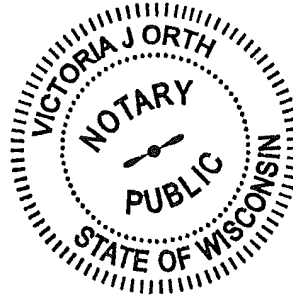


EXHIBIT A
Property

LEGAL DESCRIPTION

Lot 1 of Certified Survey Map No. 6351 as recorded in Volume 43 of Certified Surveys on Page 54 in the Dodge County Register of Deeds Office; said lands being part of the South $\frac{1}{2}$ of the Southwest $\frac{1}{4}$, Section 27, Town 12 North, Range 14 East, City of Beaver Dam, Dodge County, Wisconsin.

PIN #206-1214-2733-003
14.2 Acres

Chris Planasch

CHRIS PLANASCH - Registrar
Fee Amount: \$15.00
Total Pages 3



MSA

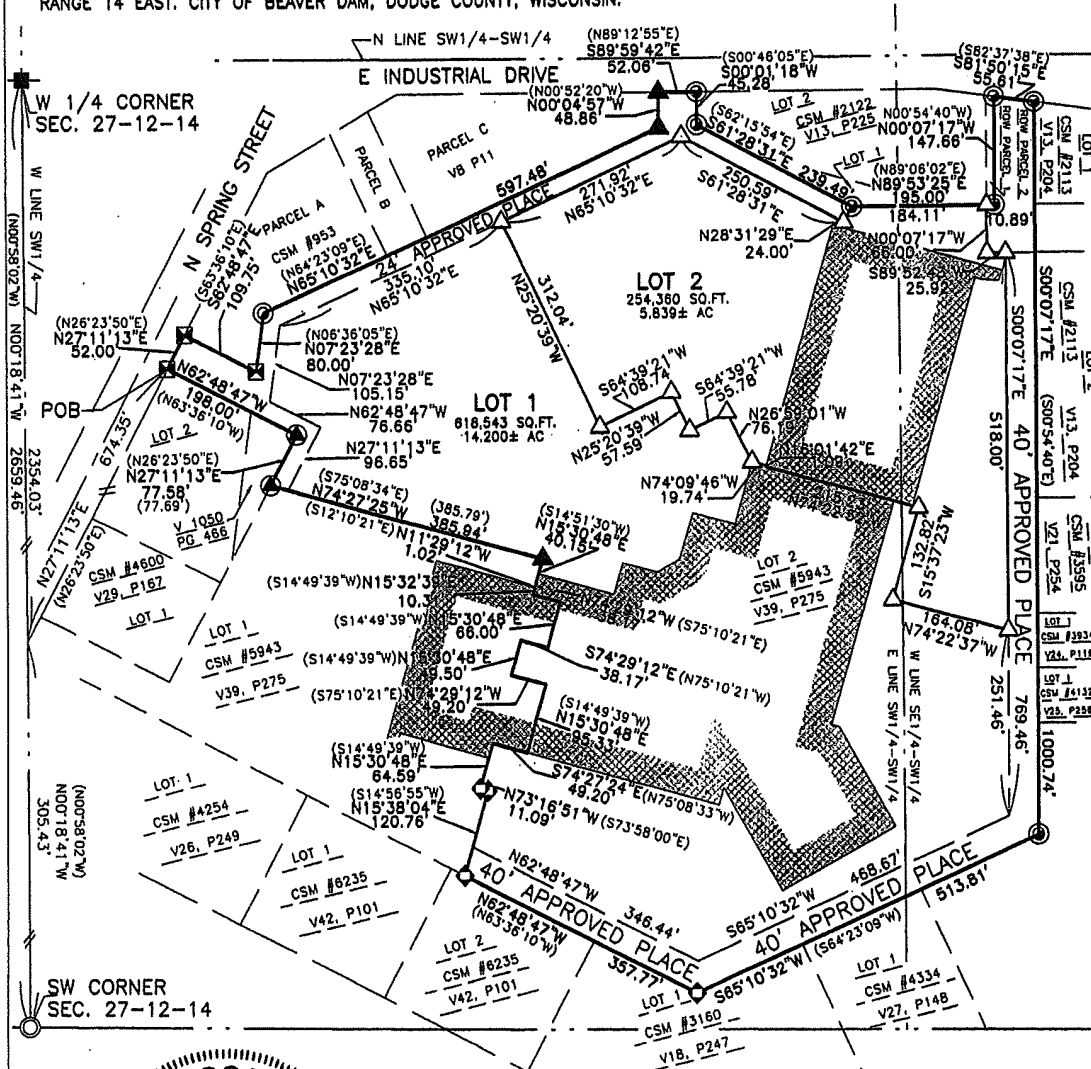
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PROJECT # 11012000	OWNER:
DRAWN BY: A Cook	1645 N Spring Street, LLC
SURVEYOR: D Steinkraus	(Heritage Mall)
FILE # csm 1.dwg	Beaver Dam, WI 53916
SHEET # 1 of 3	

DODGE COUNTY CERTIFIED SURVEY MAP # **6351**

A RESURVEY OF LOT 2 OF CERTIFIED SURVEY MAP NO. 5943 AS RECORDED IN VOLUME 39 OF CERTIFIED SURVEYS ON PAGES 275 AND 276 IN THE DODGE COUNTY REGISTER OF DEEDS; SAID LANDS BEING PART OF THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 AND PART OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4, SECTION 27, TOWN 12 NORTH, RANGE 14 EAST, CITY OF BEAVER DAM, DODGE COUNTY, WISCONSIN.



WISCONSIN
DENNIS G. STEINKRAUS
S-1609
BEAVER DAM
WISCONSIN
LAND SURVEYOR
12-14-08

LEGEND

- FD. GOVERNMENT MONUMENT
- ⊠ FOUND CUT CROSS IN CONC.
- FOUND LIMESTONE MON.
- ⊙ FOUND 1" IRON PIPE
- ⬢ FOUND IRON REBAR
- ⊕ FOUND RAILROAD SPIKE
- ▲ FOUND "PK" NAIL
- △ SET "PK" NAIL
- () RECORD INFORMATION



GRAPHIC SCALE
0 100 200
1" = 200 FEET
BEARINGS REFERENCED TO THE DODGE COUNTY COORDINATE SYSTEM



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PROJECT # 11012000

DRAWN BY: A Cook

CHECKED BY: D Steinkraus

FILE # csm 1.dwg

SHEET # 2 of 3

DODGE COUNTY CERTIFIED SURVEY MAP # 6351

I, Dennis G. Steinkraus, Registered Land Surveyor of the State of Wisconsin, do hereby certify that by order of Mr. Todd Hedberg, agent for 1645 North Spring Street, LLC, owner, I have made a resurvey of Lot 2 of Certified Survey Map No. 5943 (CSM 5943) as recorded in Volume 39 of Certified Surveys on Pages 275 and 276 in the Dodge County Register of Deeds Office; said lands being part of the Southwest 1/4 of the Southwest 1/4 and part of the Southeast 1/4 of the Southwest 1/4, Section 27, Town 12 North, Range 14 East, City of Beaver Dam, Dodge County, Wisconsin; being more particularly described as follows:

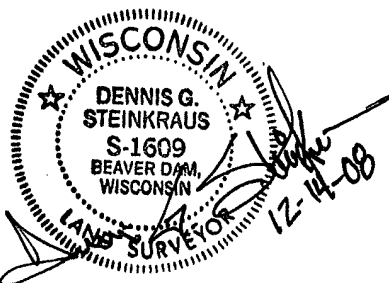
COMMENCING at the Southwest corner of said Section 27; thence, along the West line of said Southwest 1/4, N00°18'41"W, 305.43 feet to the Easterly right-of-way line of N. Spring Street; thence, along said Easterly right-of-way line, N27°11'13"E, 674.35 feet to the Northerly most corner of Lot 2 of Certified Survey Map No. 4600 (CSM 4600) as recorded in Volume 29 of Certified Surveys on Page 167 in said Register of Deeds, said point being also a Westerly corner of said Lot 2 of CSM 5943 and the POINT OF BEGINNING of lands to be described; thence, along the boundary of said Lot 2 of CSM 5943 the following courses:

1. along said Easterly right-of-way line of N. Spring Street, N27°11'13"E, 52.00 feet to the Westerly most corner of Parcel A of Certified Survey Map No. 953 (CSM 953) as recorded in Volume 8 of Certified Surveys on Page 11 in said Register of Deeds;
2. thence, along the Southwesterly line of said Parcel A, S62°48'47"E, 109.75 feet to the Southerly most corner of said Parcel A;
3. thence, along the Easterly line of said Parcel A, N07°23'28"E, 80.00 feet to an Easterly corner of said Parcel A;
4. thence, along the Southeasterly line of said Parcel A and Parcels B and C of said CSM 953, N65°10'32"E, 597.48 feet to the Southeast corner of said Parcel C;
5. thence, along the East line of said Parcel C, N00°04'57"W, 48.86 feet to the Northeast corner of said Parcel C and the Southerly right-of-way line of E. Industrial Drive;
6. thence, along said Southerly right-of-way line, S89°59'42"E, 52.06 feet to the Northwest corner of Lot 2 of Certified Survey Map No. 2122 (CSM 2122) as recorded in said Volume 13 of Certified Surveys on Page 225 in said Register of Deeds;
7. thence, along the West line of said Lot 2 of CSM 2122, S00°01'18"W, 45.28 feet to a Southerly corner of said Lot 2 of CSM 2122;
8. thence, along the Southerly line of said Lot 2 and the Southerly line of Lot 1 of said CSM 2122, S61°28'31"E, 239.49 feet to a Southerly corner of said Lot 1;
9. thence, continuing along said Southerly line of Lots 1 and 2 of CSM 2122 and the South line of lands dedicated as ROW Parcel No. 1 on Certified Survey Map No. 2113 (CSM 2113) as recorded in Volume 13 of Certified Surveys on Page 204, N89°53'25"E, 195.00 feet to the Southeast corner of said ROW Parcel No. 1 of said CSM 2113;
10. thence, along the East line of said ROW Parcel No. 1 of CSM 2113, N00°07'17"W, 147.66 feet to the Southerly right-of-way line of East Industrial Drive;
11. thence, along said Southerly right-of-way line, S81°50'15"E, 55.61 feet to the East line of ROW Parcel No. 2 of said CSM 2113;
12. thence, along the East line of said ROW Parcel No. 2 of CSM 2113 and the West line of Lots 1 and 2 of said CSM 2113, also along the West line of Lot 1 of Certified Survey Map No. 3595 as recorded in Volume 21 of Certified Surveys on Page 254, the West line of Lot 1 of Certified Survey Map No. 3934 as recorded in Volume 24 of Certified Surveys on Page 119 and the West line of Lot 1 of Certified Survey Map No. 4132 as recorded in Volume 25 of Certified Surveys on Page 256 in said Register of Deeds and its extension, S00°07'17"E, 1000.74 feet;
13. thence, along the Northerly line of Lot 1 of Certified Survey Map No. 4334 as recorded in Volume 27 of Certified Surveys on Page 148 in said Register of Deeds and the Northerly line of Lot 1 of Certified Survey Map No. 3160 (CSM 3160) as recorded in Volume 18 of Certified Surveys on Page 247 in said Register of Deeds and their extension, S65°10'32"W, 513.81 feet to a Northerly corner of said CSM 3160 being also the Southerly most corner of said Lot 2 of CSM 5943;
14. thence, continuing along a Northerly line of said Lot 1 of CSM 3160 and the Northerly line of Lot 2 of Certified Survey Map No. 6235 as recorded in Volume 42 of Certified Surveys on Page 101 in said Register of Deeds, N62°48'47"W, 357.77 feet to the Southerly most corner of Lot 1 of said CSM 5943;
15. thence, along the East line of said Lot 1 of CSM 5943 being also the West line of said Lot 2 of CSM 5943, N15°38'04"W, 120.76 feet; thence, N73°16'51"W, 11.09 feet; thence, N15°30'48"E, 64.59 feet; thence, S74°27'24"E, 49.20 feet; thence, N15°30'48"E, 95.33 feet; thence, N74°29'12"W, 49.20 feet; thence, N15°30'48"E, 49.50 feet; thence, S74°29'12"E, 38.17 feet; thence, N15°30'48"E, 66.00 feet; thence, N74°29'12"W, 38.17 feet; thence, N15°32'39"E, 10.31 feet; thence, N11°29'12"W, 1.02 feet; thence, N15°30'48"E, 40.15 feet; to the Northeast corner of said Lot 1 of CSM 5943;
16. thence, along the North line of said Lot 1 of CSM 5943, N74°27'25"W, 385.94 feet to the Northwest corner of said Lot 1 of CSM 5943 and the East line of lands described in Volume 1050 of Records on Page 466 in said Register of Deeds;
17. thence, along the Easterly line of said Volume 1050, Page 466, N27°11'13"E, 77.58 feet to the Northeast corner of said Volume 1050, Page 466;
18. thence, along the Northerly line of said Volume 1050, Page 466 and the Northerly line of Lot 2 of said CSM 4600, N62°48'47"W, 198.00 feet to Westerly most corner of said Lot 2 of CSM 5943, the Northerly most corner of said Lot 2 of CSM 4600, the Easterly right-of-way line of North Spring Street and the POINT OF BEGINNING.

Said parcel contains 872,903 square feet or 20.039 total acres, more or less. Lot 1

Bearings referenced to the Dodge County Coordinate System and shown to bear N00°18'41"W along the West line of the Southwest 1/4 of Section 27-12-14.

I further certified that this map is a correct representation of all of the exterior boundaries of the land surveyed and the division of that land; that I have complied with the provisions of Chapter 236.34 of the Wisconsin State Statutes and the City of Beaver Dam Subdivision Control Ordinance in surveying and mapping the same.



V43P055



TRANSPORTATION • MUNICIPAL
DEVELOPMENT • ENVIRONMENTAL
201 Corporate Drive, Beaver Dam, WI 53916
920-887-4242 1-800-552-6330 Fax: 920-887-4250
Web Address: www.msa-ps.com
© MSA PROFESSIONAL SERVICES

PROJECT # 11012000

DRAWN BY: A Cook

CHECKED BY: D Steinkraus

FILE # csm 1.dwg

SHEET # 3 of 3

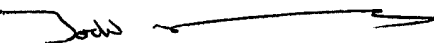
DODGE COUNTY CERTIFIED SURVEY MAP # **6351**

A RESURVEY OF LOT 2 OF CERTIFIED SURVEY MAP NO. 5943 AS RECORDED IN VOLUME 39 OF CERTIFIED SURVEYS ON PAGES 275 AND 276 IN THE DODGE COUNTY REGISTER OF DEEDS; SAID LANDS BEING PART OF THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 AND PART OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4, SECTION 27, TOWN 12 NORTH, RANGE 14 EAST. CITY OF BEAVER DAM, DODGE COUNTY, WISCONSIN.

OWNER'S CERTIFICATE

I, the undersigned, agent for owner, of the above named property, our heirs and assigns, forever adopt the Restrictive Covenants Applicable to Zero (0) Lot Line Conditional Use, of the City of Beaver Dam, Wisconsin as recorded in Volume 605 of Records on Page 111 to 114 in the Dodge County Register of Deeds Office. Dated this 30th day of DECEMBER, 2008.

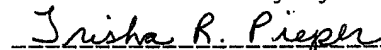
Each party acknowledges that although the easements which each enjoys over privately owned lots one of the effects of same is to provide public access to each of the respective lots and as such each lot would be considered served by public frontage onto an approved place pursuant to Section 70-2 of the Beaver Dam Municipal Code.

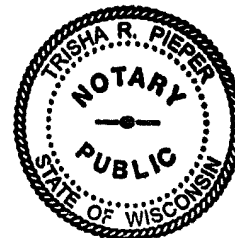


Todd Hedberg, agent
1645 N SPRING STREET, LLC

STATE OF WISCONSIN)
DODGE COUNTY)ss

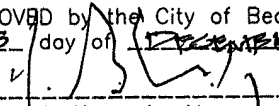
Personally came before me this 30th day of December, 2008, the above named Todd Hedberg, agent for 1645 N SPRING STREET, LLC,, to be known to be the person who executed the foregoing instrument and acknowledge the same.


Notary Public, State of Wisconsin
My Commission March 22, 2009



CITY APPROVAL

APPROVED by the City of Beaver Dam this
13 day of December, 2008.


Thomas A. Kennedy, Mayor

SURVEYOR'S SEAL



EXHIBIT B
Minimum Tax Payment

EXHIBIT B - MINIMUM TAX PAYMENT CALCULATION

Heritage Mall
Minimum Tax Payment Calculation
2019 Valuations Per Development Agreement

Parcel 206-1214-2733-020

Land Value	\$ 706,100
------------	------------

Improvement Value	\$ 1,675,900
-------------------	--------------

Parcel 206-1214-2733-003

Land Value	\$ 1,309,400
------------	--------------

Improvement Value	\$ 1,849,000
-------------------	--------------

2019 Total Taxable Base Value	<u>\$ 5,540,400</u>
-------------------------------	---------------------

2019 Assessed Tax Rate	<u>0.021376</u>
------------------------	-----------------

Minimum Tax Payment	<u>\$ 118,432</u>
----------------------------	--------------------------

EXHIBIT C
Tax Agreement

TAX AGREEMENT

Document Number

Regarding the real estate located in the City of Beaver Dam, Dodge County, Wisconsin with parcel numbers 206-1214-2733-020 and 206-1214-2733-003 (the "Property").

This Tax Agreement is entered into by and between the City of Beaver Dam and 1645 N. Spring St., LLC, a Wisconsin Limited Liability Company, included with and attached to the Development Agreement entered into by and between the same parties, with an effective date of

April 15, 2024.

Recording Area

Name and Return Address

Larry A. Konopacki
Stafford Rosenbaum LLP
P.O. Box 1784
Madison, WI 53701-1784

Parcel Identification Numbers (PIN)

206-1214-2733-020
206-1214-2733-003

This document drafted by:

Larry A. Konopacki
Stafford Rosenbaum LLP
P.O. Box 1784
Madison, WI 53701-1784
lkonopacki@staffordlaw.com
608-259-2607

TAX AGREEMENT

THIS AGREEMENT is entered into as of the 15 day of April, 2024 (the Agreement), by and between the City of Beaver Dam, a Wisconsin municipal corporation (the "City"), and 1645 N. Spring St., LLC, a Wisconsin Limited Liability Company (the "Developer").

RECITALS

A. The City, and Developer have entered into a Development Agreement dated April 15, 2024, 2024, relating to the renovation of the Property.

B. Developer is the sole owner of real estate located in the City of Beaver Dam, Dodge County, Wisconsin with parcel numbers 206-1214-2733-020 and 206-1214-2733-003 (the "Property").

C. The Development Agreement provides that it shall not take effect unless an agreement relating to the preservation of the taxable status of the Property has been signed by the City and the Developer.

D. Developer and the City wish to enter into this Agreement concerning preservation of the taxable status of the Property.

E. The City and other taxing jurisdictions have provided and shall continue to provide public health, safety, fire and police protection, streets and street maintenance, snow removal, and other governmental services ("Municipal Services") that are funded by property taxes.

NOW, THEREFORE, in consideration of the Recitals, and the mutual promises, obligations and benefits provided under this Agreement and the Development Agreement, the receipt and adequacy of which are hereby acknowledged, Developer and the City agree as follows:

1. **Recitals Incorporated.** The recitals stated above are incorporated in this Agreement by reference.

2. **Definitions in Development Agreement.** Terms that are capitalized in this Agreement that are not defined in this Agreement and that are defined in the Development Agreement shall have the meanings assigned to such terms by the Development Agreement.

3. **Representations and Warranties by Developer.** Developer represents and warrants that Developer: (1) is a limited liability company organized and existing under the laws of the State of Wisconsin; (2) has taken all actions necessary to enter into this Agreement; (3) has duly authorized the individual signers of this Agreement to do so; (4) is, the sole owner of the Property, in fee simple; and (5) Developer has obtained the consent of the holder of any lien placed upon or taken against the Property (in the form appended to this Agreement), and Developer will not allow any other lien to be placed upon or taken against the Property prior to the recording of this Agreement with the Register of Deeds for Dodge County.

4. **Tax Status of the Property.** The Property shall be subject to property taxation until the closure of TID #8 and shall not be exempt from property taxation, in full or in part, except as required by law. Upon taking ownership of the Property, Developer shall take all reasonable actions to assure that the Property shall not be exempt from property taxation, in full or in part, except as required by law. Developer shall not submit any request or application for property tax exemption of the Property, in full or in part, challenge the status of the Property as fully subject to property taxation, or seek any ruling by a court or any statutory change that would entitle the Property to exemption, in full or part. Nothing herein shall be construed as preventing Developer from challenging the Property's assessed value or the amount of property tax claimed due, except that if Developer challenges the assessed value of the Property the Developer shall provide to the City income and rental information for the Property at the time the challenge is filed. Nothing herein shall be construed as preventing Developer from conveying all or part of the Property, subject to the terms and conditions of this Agreement and the Development Agreement.

5. **Payment for Municipal Services If Property Becomes Tax Exempt.** If in any year during the Term of this Agreement (defined below) (the "Valuation Year") the Property is exempt from property taxation, in full or in part, Developer shall pay the City, as a payment for municipal services provided by the City with respect to the Property ("Payment for Municipal Services"), the difference between (1) the amount of property taxes on the Property that the City would have received for the Valuation Year if the Property were fully subject to property taxation, and (2) the amount of property taxes, if any, on the Property actually received by the City from Developer for the Valuation Year. The City shall send Developer an invoice for the Payment for Municipal Services due. One-half of the Payment for Municipal Services shall be due on January 31 of the year after the Valuation Year. The balance of the Payment for Municipal Services shall be due on July 31 of the year after the Valuation Year. Each payment shall be deemed made when actually received by the City. Any amount due that is not paid on time shall bear interest in the same manner and at the same rate as provided by law for unpaid property taxes. The Payment for Municipal Services shall constitute payment for municipal services provided with respect to the Property during the Valuation Year. The

City and Developer acknowledge and agree that this Payment for Municipal Services would constitute a reasonable and appropriate means of carrying out the intent of the parties and would fairly and reasonably compensate the City for the municipal services provided during the Valuation Year.

6. **Calculation of Property Taxes as If Property Were Not Exempt.** If, for purposes of this Agreement, it becomes necessary to calculate the amount of property taxes on the Property that the City would have received if the Property were fully subject to property taxation, this amount shall be calculated as follows: (1) The fair market value of the Property as of January 1 of the Valuation Year shall be determined, in the same manner as provided by law for property that is fully taxable, by the City Assessor or, if the City Assessor is unable or unwilling to do so, by a competent and impartial appraiser selected by the City in its sole discretion. (2) The fair market value, as so determined, shall be divided by the average assessment ratio for the Valuation Year for property in the City, as determined by the Wisconsin Department of Revenue. (3) The resulting amount shall be multiplied by the mil rate at which taxable property in the City is taxed to levy taxes for all taxing jurisdictions to which the Property is subject for the Valuation Year. That amount shall be deemed the amount of property taxes on the Property that the City would have received for the Valuation Year if the Property were fully taxable.

7. **Special Assessment If Any Required Payment For Municipal Services Is Not Timely Made.** Any Payment for Municipal Services required under Section 5 of this Agreement that is not made when due shall entitle the City to levy a special assessment against the Property for the amount due, plus interest. Developer hereby consents to the levy of any such special assessment, and pursuant to Wis. Stat. § 66.0703(7)(b), waives any right to notice of or any hearing on any such special assessment.

8. **Indemnification.** Developer shall indemnify the City for all amounts of reasonable attorneys' fees and expenses and expert fees and expenses incurred in enforcing this Agreement. This paragraph shall not be applicable to cases where Developer has, in good faith, disputed the City's valuation of the Property.

9. **Remedies.** The City shall have all remedies provided by this Agreement, and provided at law or in equity, necessary to cure any default or remedy any damages under this agreement. Remedies shall include, but are not limited to, special assessments and indemnification under this Agreement and all other remedies available at law or in equity.

10. **Term of Agreement.** The term of this Agreement shall begin on the date the Agreement is signed by both parties and shall continue until the closure of TID #8 (the "Term") unless terminated by mutual written agreement of the parties to this Agreement.

11. **Successors and Assigns.** This Agreement shall run with the land and is binding on the successors and assigns of the parties, including, but not limited to, any subsequent owner of the Property, any part of the Property, or any real property interest in the Property or any part of the Property. If at any time the Property has more than one owner, any Payment for Municipal Services due under this Agreement for any Valuation Year shall be allocated among the owners jointly and severally. Notwithstanding the foregoing or anything else set forth herein, if Developer shall sell or otherwise convey its interest in the Property, and the City consents in writing to assignment of the Developer's obligations under this Agreement, Developer shall be deemed released from all obligations hereunder and the City shall look solely to successors in interest for the performance of all of the obligations imposed on Developer by this Agreement.

12. **Recording.** This Agreement shall be recorded with the Register of Deeds for Dodge County as soon as practicable following execution by Developer and the City.

13. **Entire Agreement; Amendments.** This Agreement encompasses the entire agreement of the parties regarding its subject matter. Any amendment hereto shall be effective only when it is made in writing and signed by all parties.

14. **Severability.** If any part of this Agreement is determined to be invalid or unenforceable, the rest of the Agreement shall remain in effect.

15. **Waiver.** No waiver of any breach of this Agreement shall be deemed a continuing waiver of that breach or a waiver of any other breach of this Agreement.

16. **Interpretation of Agreement.** The parties acknowledge that this Agreement is the product of joint negotiations. If any dispute arises concerning the interpretation of this Agreement, neither party shall be deemed the drafter of this Agreement for purposes of its interpretation.

17. **Notices.** Any notice required to be given under this Agreement shall be deemed given when deposited in the United States mail, postage prepaid, return receipt requested, to the party at the address stated below or when actually received by the party, whichever is first. The addresses are:

If to City:

City Clerk
City of Beaver Dam
205 S Lincoln Avenue
Beaver Dam, WI 53916

If to Developer: 1645 N. Spring St., LLC
Attn: Todd Hedberg
718 Park Avenue
Beaver Dam, WI 53916

Addresses may be changed by notice given in the manner provided in this section.

18. **Governing Law.** This Agreement has been negotiated and signed in the State of Wisconsin and shall be governed, interpreted, and enforced in accordance with the laws of the United States and the State of Wisconsin.

[SIGNATURES ON FOLLOWING PAGES]

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date first set forth above.

CITY:

City of Beaver Dam

By Michael Wissell
Mayor, City of Beaver Dam

By Tracey Ferron
City Clerk, City of Beaver Dam

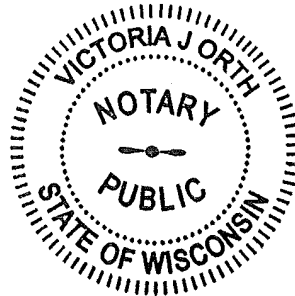
ACKNOWLEDGMENT

STATE OF WISCONSIN

COUNTY OF DODGE

Personally came before me this 15th day of April, 2024, the above-named Michael Wissell and Tracey Ferron, to me known to be the persons and officers who executed the foregoing instrument and acknowledged the same.

Victoria J Orth
Notary Public, State of Wisconsin
My Commission: Nov 26, 2027



DEVELOPER:

1645 N. SPRING ST., LLC

By [Signature], Managing Partner
(ADD Name and Title)

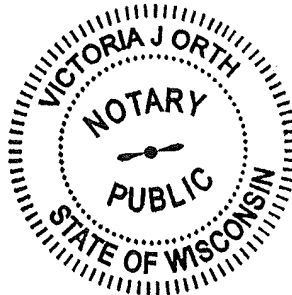
ACKNOWLEDGMENT

STATE OF WISCONSIN

COUNTY OF Dodge

Personally came before me this 15th day of April, 2024, the above-named Todd Hedberg to me known to be the person who executed the foregoing instrument and acknowledged the same.

Victoria J Orth
Notary Public, State of Wisconsin
My Commission: 11/26/2027



CONSENT OF LIENHOLDERS AND MORTGAGE SUBORDINATION

For value received and to induce the City to enter the Tax Agreement with Owner, _____, as holder of a mortgage dated _____ and recorded _____ as document _____, made by _____, to _____, to secure an indebtedness in the amount of \$ _____ ("Mortgage"), hereby consents to the execution and delivery of the foregoing Tax Agreement by Owner, and hereby subordinates its Mortgage (and any other liens that it may obtain with respect to the Property) to any and all claims of the City, its successors and assigns under the Tax Agreement. Lienholder acknowledges that the City is relying on the consent of Lienholder and Lienholder's agreement to subordinate its Mortgage to the claims of the City under the Tax Agreement when agreeing to enter the Tax Agreement with Owner. Lienholder acknowledges that the execution and delivery of the Tax Agreement by Owner and the City is in Lienholder's best interest. Lienholder's agreement to consent to the Tax Agreement and subordinate the Mortgage to the City's claims under the Tax Agreement are binding on the assigns and successors of Lienholder.

Dated: _____

By: _____

Name: _____

Title: _____

Attest:

Name: _____

Title: _____

EXHIBIT D
Mortgage Note

EXHIBIT D - MORTGAGE NOTE

MORTGAGE NOTE

\$ _____, 2024

FOR VALUE RECEIVED, the undersigned, 1645 N. Spring St., LLC, a Wisconsin Limited Liability Company, with an address of 1645 N. Spring Street, Beaver Dam, Wisconsin, 53916 (the "Maker"), promises to pay to the order of the City of Beaver Dam, a political subdivision of the State of Wisconsin (the "City"), at its principal office at Beaver Dam City Hall, 205 South Lincoln Avenue, Beaver Dam, Wisconsin 53916 or such other place as the holder hereof may designate in writing in immediately available funds, the principal sum as calculated in accordance with the attached Development Agreement in one installment on ___, 2034 plus interest on the outstanding principal amount at the rate of 0% per annum through maturity.

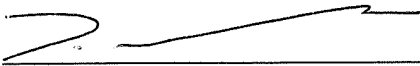
The principal balance due on this Note shall be reduced by ten percent (10%) each year commercial tenant Harbor Freight remains in business in the Development Property, as defined in the Development Agreement, and the Maker is not in breach of this Note or the Development Agreement. In the event Development Property or any portion thereof is sold within five (5) years of the date of this Note and the proceeds from said sale exceed thirteen million dollars (\$13,000,000.00) Maker shall immediately repay the principle balance then due on this Note.

Full or partial payment of this Note is permitted at any time without penalty. This Note is secured by a Mortgage on Maker's property executed as of the date hereof. If any installment is not paid when due, Holder may provide written notice thereof to Maker. Maker shall have ninety (90) days after receipt of such notice to cure such default and if Maker fails to cure the unpaid balance shall, at the option of Holder, and without further notice mature and become immediately payable. The unpaid balance shall automatically mature and become immediately payable in the event Maker becomes a subject of bankruptcy or other insolvency proceedings. Receipt by Holder of any payment on this Note after the occurrence of any event of default shall not constitute a waiver of the default of Holder's right and remedies upon such default. In the event of such default, interest shall accrue on the unpaid balance at the rate of 8.0% per annum and such interest shall continue to accrue until the unpaid balance, including accrued interest is paid in full. Maker agrees to pay all reasonable costs of collection before and after judgment including reasonable attorney's fees and hereby expressly waives presentment, protest, demand, and Notice of Dishonor.

This Note and the related Mortgage may not be assigned to, or assumed by, a third party without the prior written consent of the Holder of this Note.

IN WITNESS WHEREOF, Maker has signed, sealed, and delivered this Note as of the day and year first above written.

1645 N. SPRING STREET, LLC

By:  _____

TODD HERBERG, MANAGING PARTNER

Attest: _____

(CORPORATE SEAL)

EXHIBIT E
Mortgage

MORTGAGE

Document Number

Document Name

1645 N. Spring Street, LLC

("Mortgagor," whether one or more) mortgages to City of Beaver Dam, a Municipal Corporation of Dodge County, WI, its successors or assigns ("Mortgagee," whether one or more), to secure payment of \$ _____ evidenced by a note or notes, or other obligation ("Obligation") dated _____, executed by 1645 N. Spring Street, LLC

to Mortgagee, and any extensions, renewals and modifications of the Obligation and refinancings of any such indebtedness on any terms whatsoever (including increases in interest) and the payment of all other sums, with interest, advanced to protect the Property and the security of this Mortgage, and all other amounts paid by Mortgagee hereunder, the following property, together with all rights and interests appurtenant thereto in law or equity, all rents, issue and profits arising therefrom, including insurance proceeds and condemnation awards, all structures, improvements and fixtures located thereon, in Dodge County, State of Wisconsin ("Property"): See attached map and legal description.

Recording Area

Name and Return Address

STAFFORD ROSENBAUM LLP
Larry Konopacki, Esq.
222 W. Washington Ave. #900
Madison, WI 53701

206-1214-2733-003

Parcel Identification Number (PIN)

This is not homestead property.~~(is)~~ (is not)This is not a purchase money mortgage.~~(is)~~ (is not)**1. MORTGAGOR'S COVENANTS.**

a. **COVENANT OF TITLE.** Mortgagor warrants title to the Property, except restrictions and easements of record, if any, and further excepting:

b. ~~**FIXTURES.** Any property which has been affixed to the Property and is used in connection with it is intended to become a fixture. Mortgagor waives any right to remove such fixture from the Property which is subject to this Mortgage.~~

c. **TAXES.** Mortgagor promises to pay when due all taxes and assessments levied on the Property or upon Mortgagee's interest in it and to deliver to Mortgagee on demand receipts showing such payment.

d. **INSURANCE.** Mortgagor shall keep the improvements on the Property insured against loss or damage occasioned by fire, extended coverage perils and such other hazards as Mortgagee may require, without co-insurance, through insurers approved by Mortgagee, in the amount of the full replacement value of the improvements on the Property. Mortgagor shall pay the insurance premiums when due. The policies shall contain the standard mortgage clause in favor of Mortgagee, and evidence of all policies covering the Property shall be provided to Mortgagee. Mortgagor shall promptly give notice of loss to insurance companies and Mortgagee. Unless Mortgagor and

Mortgagee otherwise agree in writing, insurance proceeds shall be applied to restoration or repair of the Property damaged, provided Mortgagee deems the restoration or repair to be economically feasible.

e. **OTHER COVENANTS.** Mortgagor covenants not to commit waste nor suffer waste to be committed on the Property, to keep the Property in good condition and repair, to keep the Property free from future liens superior to the lien of this Mortgage and to comply with all laws, ordinances and regulations affecting the Property. Mortgagor shall pay when due all indebtedness which may be or become secured at any time by a mortgage or other lien on the Property superior to this Mortgage and any failure to do so shall constitute a default under this Mortgage.

2. **DEFAULT AND REMEDIES.** Mortgagor agrees that time is of the essence with respect to payment of principal and interest when due, and in the performance of the terms, conditions and covenants contained herein or in the Obligation secured hereby. In the event of default, Mortgagee may, at its option, declare the whole amount of the unpaid principal and accrued interest due and payable, and collect it in a suit at law or by foreclosure of this Mortgage or by the exercise of any other remedy available at law or equity. If this Mortgage is subordinate to a superior mortgage lien, a default under the superior mortgage lien constitutes a default under this Mortgage.

3. **NOTICE.** Unless otherwise provided in the Obligation secured by this Mortgage, prior to any acceleration (other than under paragraph 9, below) Mortgagee shall mail notice to Mortgagor specifying: (a) the default; (b) the action required to cure the default; (c) a date, not less than 15 days from the date the notice is mailed to Mortgagor by which date the default must be cured; and (d) that failure to cure the default on or before the date specified in the notice may result in acceleration.

4. **EXPENSES AND ATTORNEY FEES.** In case of default, whether abated or not, all costs and expenses, including, but not limited to, reasonable attorney fees, to the extent not prohibited by law shall be added to the principal, become due as incurred, and in the event of foreclosure be included in the judgment.

5. **FORECLOSURE WITHOUT DEFICIENCY.** Mortgagor agrees to the provisions of Sections 846.101 and 846.103, Wis. Stats., as may apply to the Property and as may be amended, permitting Mortgagee in the event of foreclosure to waive the right to judgment for deficiency and hold the foreclosure sale within the time provided in such applicable Section.

6. **RECEIVER.** Upon default or during the pendency of any action to foreclose this Mortgage, Mortgagor consents to the appointment of a receiver of the Property, including homestead interest, to collect the rents, issues and profits of the Property during the pendency of such an action, and such rents, issues and profits when so collected shall be held and applied as the court shall direct.

7. **WAIVER.** Mortgagee may waive any default without waiving any other subsequent or prior default by Mortgagor.

8. **MORTGAGEE MAY CURE DEFAULTS.** In the event of any default by Mortgagor of any kind under this Mortgage or any Obligation secured by this Mortgage, Mortgagee may cure the default and all sums paid by Mortgagee for such purpose shall immediately be repaid by Mortgagor with interest at the rate then in effect under the Obligation secured by this Mortgage and shall constitute a lien upon the Property.

9. **CONSENT REQUIRED FOR TRANSFER.** Mortgagor shall not transfer, sell or convey any legal or equitable interest in the Property (by deed, land contract, option, long-term lease or in any other way) without the prior written consent of Mortgagee, unless either the indebtedness secured by this Mortgage is first paid in full or the interest conveyed is a mortgage or other security interest in the Property, ~~subordinate to the lien of this Mortgage~~. The entire indebtedness under the Obligation secured by this Mortgage shall become due and payable in full at the option of Mortgagee without notice, which notice is hereby waived, upon any transfer, sale or conveyance made in violation of this paragraph. A violation of the provisions of this paragraph will be considered a default under the terms of this Mortgage and the Obligation it secures.

10. **ASSIGNMENT OF RENTS.** Mortgagor hereby transfers and assigns absolutely to Mortgagee, as additional security, all rents, issues and profits which become or remain due (under any form of agreement for use or occupancy of the Property or any portion thereof), or which were previously collected and remain subject to Mortgagor's control following any default under this Mortgage or the Obligation secured hereby and delivery of notice of exercise of this assignment by Mortgagee to the tenant or other user(s) of the Property in accordance with the provisions of Section 708.11, Wis. Stats., as may be amended. This assignment shall be enforceable with or without appointment of a receiver and regardless of Mortgagee's lack of possession of the Property.

11. **ENVIRONMENTAL PROVISION.** Mortgagor represents, warrants and covenants to Mortgagee that (a) during the period of Mortgagor's ownership or use of the Property no substance has been, is or will be present, used, stored, deposited, treated, recycled or disposed of on, under, in or about the Property in a form, quantity or manner which if known to be present on, under, in or about the Property would require clean-up, removal or other remedial action ("Hazardous Substance") under any federal, state or local laws, regulations, ordinances, codes or rules ("Environmental Laws"); (b) Mortgagor has no knowledge, after due inquiry, of any prior use or existence of any Hazardous Substance on the Property by any prior owner of or person using the Property; (c) without limiting the generality of the foregoing, Mortgagor has no knowledge, after due inquiry, that the Property contains asbestos, polychlorinated biphenyl components ("PCBs") or underground storage tanks; (d) there are no conditions existing currently or likely to exist during the term of this Mortgage which would subject Mortgagor to any damages, penalties, injunctive relief or clean-up costs in any governmental or regulatory action or third-party claims relating to any Hazardous Substance; (e) Mortgagor is not subject to any court or administrative proceeding, judgment, decree, order or citation relating to any Hazardous Substance; and (f) Mortgagor in the past has been, at the present is and in the future will remain in compliance with all Environmental Laws. Mortgagor shall indemnify and hold harmless Mortgagee from all loss, cost (including reasonable attorney fees and legal expenses), liability and damage whatsoever directly or indirectly resulting from, arising out of or based upon (i) the presence, use, storage, deposit, treatment, recycling or disposal, at any time, of any Hazardous Substance on, under, in or about the Property, or the transportation of any Hazardous Substance to or from the Property, (ii) the violation or alleged violation of any Environmental Law, permit, judgment or license relating to the presence, use, storage, deposit, treatment, recycling or disposal of any Hazardous Substance on, under, in or about the Property, or the transportation of any Hazardous Substance to or from the Property, or (iii) the imposition of any governmental lien for the recovery of environmental clean-up costs expended under any Environmental Law. Mortgagor shall immediately notify Mortgagee in writing of any governmental or regulatory action or third-party claim instituted or threatened in connection with any Hazardous Substance on, in, under or about the Property.

~~12. **SECURITY INTEREST ON FIXTURES.** To further secure the payment and performance of the Obligation, Mortgagor hereby grants to Mortgagee a security interest in:~~

~~**CHOOSE ONE OF THE FOLLOWING OPTIONS, IF NEITHER IS CHOSEN, OPTION A SHALL APPLY:**~~

- ☐ ~~A: All fixtures and personal property located on or related to the operations of the Property whether now owned or hereafter acquired.~~
- ☐ ~~B: All property listed on the attached schedule.~~

~~This Mortgage shall constitute a security agreement within the meaning of the Uniform Commercial Code with respect to those parts of the Property indicated above. This Mortgage constitutes a fixture filing and financing statement as those terms are used in the Uniform Commercial Code. This Mortgage is to be filed and recorded in the real estate records of the county in which the Property is located, and the following information is included: (1) Mortgagor shall be deemed the "debtor"; (2) Mortgagee shall be deemed to be the "secured party" and shall have all of the rights of a secured party under the Uniform Commercial Code; (3) this Mortgage covers goods which are or are to become fixtures; (4) the name of the record owner of the land is the debtor; (5) the legal name and address of the debtor are~~

~~(6) the state of organization and the organizational identification number of the debtor (if applicable) are~~

~~(7) the address of the secured party is~~

13. **SINGULAR; PLURAL.** As used herein, the singular shall include the plural and any gender shall include all genders.

14. **JOINT AND SEVERAL/LIMITATION ON PERSONAL LIABILITY.** The covenants of this Mortgage set forth herein shall be deemed joint and several among Mortgagors, if more than one. Unless a Mortgagor is obligated on the Obligation secured by this Mortgage, Mortgagor shall not be liable for any breach of covenants contained in this Mortgage.

15. **INVALIDITY.** In the event any provision or portion of this instrument is held to be invalid or unenforceable, this shall not impair or preclude the enforcement of the remainder of the instrument.

16. ~~**MARITAL PROPERTY STATEMENT.** Any individual Mortgagor who is married represents that the obligation evidenced by this instrument was incurred in the interest of Mortgagor's marriage or family.~~

Dated _____ .

_____(SEAL) _____(SEAL)

* _____ *

_____(SEAL) _____(SEAL)

* _____ *

AUTHENTICATION

Signature(s) _____

authenticated on _____ .

* _____

TITLE: MEMBER STATE BAR OF WISCONSIN

(If not, _____

authorized by Wis. Stat. § 706.06)

THIS INSTRUMENT DRAFTED BY:

Larry Konopacki, Esq.

ACKNOWLEDGMENT

STATE OF WISCONSIN)
) ss.
 _____ COUNTY)

Personally came before me on _____ ,
the above-named _____

to me known to be the person(s) who executed the
foregoing instrument and acknowledged the same.

* _____

Notary Public, State of Wisconsin
My Commission (is permanent) (expires: _____)

(Signatures may be authenticated or acknowledged. Both are not necessary.)

MORTGAGE NOTE: THIS IS A STANDARD FORM. ANY MODIFICATIONS TO THIS FORM SHOULD BE CLEARLY IDENTIFIED
STATE BAR OF WISCONSIN FORM NO. 21-2003

*Type name below signatures.

LEGAL DESCRIPTION

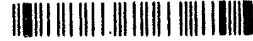
Lot 1 of Certified Survey Map No. 6351 as recorded in Volume 43 of Certified Surveys on Page 54 in the Dodge County Register of Deeds Office; said lands being part of the South $\frac{1}{2}$ of the Southwest $\frac{1}{4}$, Section 27, Town 12 North, Range 14 East, City of Beaver Dam, Dodge County, Wisconsin.

PIN #206-1214-2733-003
14.2 Acres

16/3

Chris Planasch

CHRIS PLANASCH - Registrar
Fee Amount: \$15.00
Total Pages 3



MSA

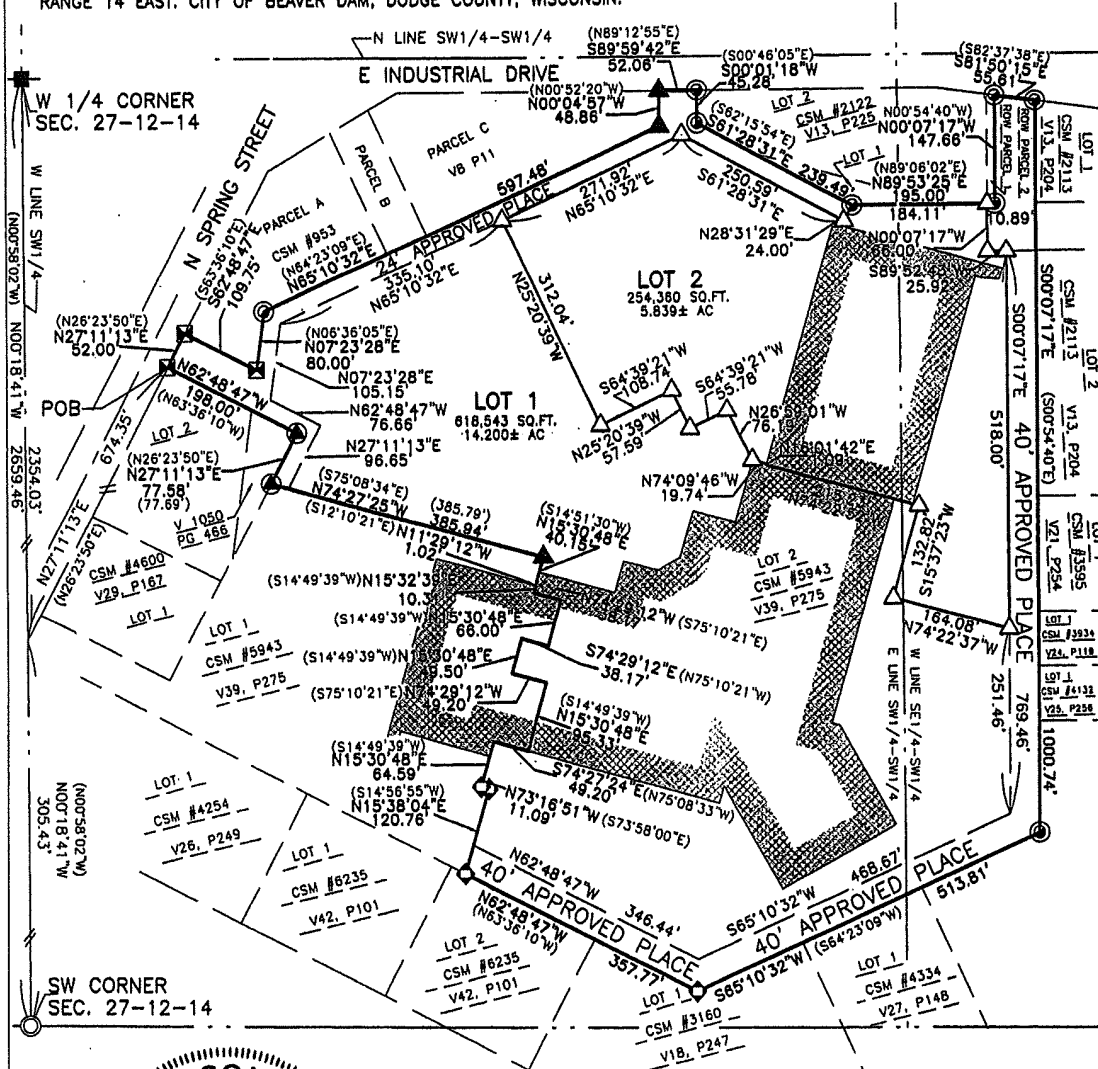
PROFESSIONAL SERVICES

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Web Address: www.msa-ps.com
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PROJECT # 11012000	OWNER:
DRAWN BY: A Cook	1645 N Spring Street, LLC
SURVEYOR: D Steinkraus	(Heritage Mall)
FILE # csm 1.dwg	Beaver Dam, WI 53916
SHEET # 1 of 3	

DODGE COUNTY CERTIFIED SURVEY MAP # **6351**

A RESURVEY OF LOT 2 OF CERTIFIED SURVEY MAP NO. 5943 AS RECORDED IN VOLUME 39 OF CERTIFIED SURVEYS ON PAGES 275 AND 276 IN THE DODGE COUNTY REGISTER OF DEEDS; SAID LANDS BEING PART OF THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 AND PART OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4, SECTION 27, TOWN 12 NORTH, RANGE 14 EAST, CITY OF BEAVER DAM, DODGE COUNTY, WISCONSIN.



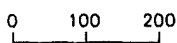
WISCONSIN
DENNIS G. STEINKRAUS
S-1609
BEAVER DAM, WISCONSIN
LAND SURVEYOR
12-4-08

LEGEND

- FD. GOVERNMENT MONUMENT
- ⊠ FOUND CUT CROSS IN CONC.
- FOUND LIMESTONE MON.
- ⊙ FOUND 1" IRON PIPE
- ⊕ FOUND IRON REBAR
- ⚡ FOUND RAILROAD SPIKE
- ▲ FOUND "PK" NAIL
- △ SET "PK" NAIL
- () RECORD INFORMATION



GRAPHIC SCALE



1" = 200 FEET

BEARINGS REFERENCED TO THE DODGE COUNTY COORDINATE SYSTEM

v43r054



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PROJECT # 11012000

DRAWN BY: A Cook

CHECKED BY: D Steinkraus

FILE # csm 1.dwg

SHEET # 2 of 3

DODGE COUNTY CERTIFIED SURVEY MAP # 6351

I, Dennis G. Steinkraus, Registered Land Surveyor of the State of Wisconsin, do hereby certify that by order of Mr. Todd Hedberg, agent for 1645 North Spring Street, LLC, owner, I have made a resurvey of Lot 2 of Certified Survey Map No. 5943 (CSM 5943) as recorded in Volume 39 of Certified Surveys on Pages 275 and 276 in the Dodge County Register of Deeds Office; said lands being part of the Southwest 1/4 of the Southwest 1/4 and part of the Southeast 1/4 of the Southwest 1/4, Section 27, Town 12 North, Range 14 East, City of Beaver Dam, Dodge County, Wisconsin; being more particularly described as follows:

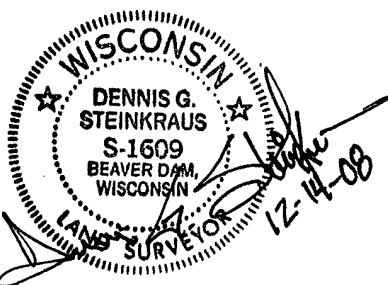
COMMENCING at the Southwest corner of said Section 27; thence, along the West line of said Southwest 1/4, N00°18'41"W, 305.43 feet to the Easterly right-of-way line of N. Spring Street; thence, along said Easterly right-of-way line, N27°11'13"E, 674.35 feet to the Northerly most corner of Lot 2 of Certified Survey Map No. 4600 (CSM 4600) as recorded in Volume 29 of Certified Surveys on Page 167 in said Register of Deeds, said point being also a Westerly corner of said Lot 2 of CSM 5943 and the POINT OF BEGINNING of lands to be described; thence, along the boundary of said Lot 2 of CSM 5943 the following courses:

1. along said Easterly right-of-way line of N. Spring Street, N27°11'13"E, 52.00 feet to the Westerly most corner of Parcel A of Certified Survey Map No. 953 (CSM 953) as recorded in Volume 8 of Certified Surveys on Page 11 in said Register of Deeds;
2. thence, along the Southwesterly line of said Parcel A, S62°48'47"E, 109.75 feet to the Southerly most corner of said Parcel A;
3. thence, along the Easterly line of said Parcel A, N07°23'28"E, 80.00 feet to an Easterly corner of said Parcel A;
4. thence, along the Southeasterly line of said Parcel A and Parcels B and C of said CSM 953, N65°10'32"E, 597.48 feet to the Southeast corner of said Parcel C;
5. thence, along the East line of said Parcel C, N00°04'57"W, 48.86 feet to the Northeast corner of said Parcel C and the Southerly right-of-way line of E. Industrial Drive;
6. thence, along said Southerly right-of-way line, S89°59'42"E, 52.06 feet to the Northwest corner of Lot 2 of Certified Survey Map No. 2122 (CSM 2122) as recorded in said Volume 13 of Certified Surveys on Page 225 in said Register of Deeds;
7. thence, along the West line of said Lot 2 of CSM 2122, S00°01'18"W, 45.28 feet to a Southerly corner of said Lot 2 of CSM 2122;
8. thence, along the Southerly line of said Lot 2 and the Southerly line of Lot 1 of said CSM 2122, S61°28'31"E, 239.49 feet to a Southerly corner of said Lot 1;
9. thence, continuing along said Southerly line of Lots 1 and 2 of CSM 2122 and the South line of lands dedicated as ROW Parcel No. 1 on Certified Survey Map No. 2113 (CSM 2113) as recorded in Volume 13 of Certified Surveys on Page 204, N89°53'25"E, 195.00 feet to the Southeast corner of said ROW Parcel No. 1 of said CSM 2113;
10. thence, along the East line of said ROW Parcel No. 1 of CSM 2113, N00°07'17"W, 147.66 feet to the Southerly right-of-way line of East Industrial Drive;
11. thence, along said Southerly right-of-way line, S81°50'15"E, 55.61 feet to the East line of ROW Parcel No. 2 of said CSM 2113;
12. thence, along the East line of said ROW Parcel No. 2 of CSM 2113 and the West line of Lots 1 and 2 of said CSM 2113, also along the West line of Lot 1 of Certified Survey Map No. 3595 as recorded in Volume 21 of Certified Surveys on Page 254, the West line of Lot 1 of Certified Survey Map No. 3934 as recorded in volume 24 of Certified Surveys on Page 119 and the West line of Lot 1 of Certified Survey Map No. 4132 as recorded in Volume 25 of Certified Surveys on Page 256 in said Register of Deeds and its extension, S00°07'17"E, 1000.74 feet;
13. thence, along the Northerly line of Lot 1 of Certified Survey Map No. 4334 as recorded in Volume 27 of Certified Surveys on Page 148 in said Register of Deeds and the Northerly line of Lot 1 of Certified Survey Map No. 3160 (CSM 3160) as recorded in Volume 18 of Certified Surveys on Page 247 in said Register of Deeds and their extension, S65°10'32"W, 513.81 feet to a Northerly corner of said CSM 3160 being also the Southerly most corner of said Lot 2 of CSM 5943;
14. thence, continuing along a Northerly line of said Lot 1 of CSM 3160 and the Northerly line of Lot 2 of Certified Survey Map No. 6235 as recorded in Volume 42 of Certified Surveys on Page 101 in said Register of Deeds, N62°48'47"W, 357.77 feet to the Southerly most corner of Lot 1 of said CSM 5943;
15. thence, along the East line of said Lot 1 of CSM 5943 being also the West line of said Lot 2 of CSM 5943, N15°38'04"W, 120.76 feet; thence, N73°16'51"W, 11.09 feet; thence, N15°30'48"E, 64.59 feet; thence, S74°27'24"E, 49.20 feet; thence, N15°30'48"E, 95.33 feet; thence, N74°29'12"W, 49.20 feet; thence, N15°30'48"E, 49.50 feet; thence, S74°29'12"E, 38.17 feet; thence, N15°30'48"E, 66.00 feet; thence, N74°29'12"W, 38.17 feet; thence, N15°32'39"E, 10.31 feet; thence, N11°29'12"W, 1.02 feet; thence, N15°30'48"E, 40.15 feet; to the Northeast corner of said Lot 1 of CSM 5943;
16. thence, along the North line of said Lot 1 of CSM 5943, N74°27'25"W, 385.94 feet to the Northwest corner of said Lot 1 of CSM 5943 and the East line of lands described in Volume 1050 of Records on Page 466 in said Register of Deeds;
17. thence, along the Easterly line of said Volume 1050, Page 466, N27°11'13"E, 77.58 feet to the Northeast corner of said Volume 1050, Page 466;
18. thence, along the Northerly line of said Volume 1050, Page 466 and the Northerly line of Lot 2 of said CSM 4600), N62°48'47"W, 198.00 feet to Westerly most corner of said Lot 2 of CSM 5943, the Northerly most corner of said Lot 2 of CSM 4600, the Easterly right-of-way line of North Spring Street and the POINT OF BEGINNING.

Said parcel contains 872,903 square feet or 20.039 total acres, more or less. Lot 1

Bearings referenced to the Dodge County Coordinate System and shown to bear N00°18'41"W along the West line of the Southwest 1/4 of Section 27-12-14.

I further certified that this map is a correct representation of all of the exterior boundaries of the land surveyed and the division of that land; that I have complied with the provisions of Chapter 236.34 of the Wisconsin State Statutes and the City of Beaver Dam Subdivision Control Ordinance in surveying and mapping the same.





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PROJECT # 11012000

DRAWN BY: A Cook

CHECKED BY: D Steinkraus

FILE # csm 1.dwg

SHEET # 3 of 3

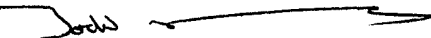
DODGE COUNTY CERTIFIED SURVEY MAP # **6351**

A RESURVEY OF LOT 2 OF CERTIFIED SURVEY MAP NO. 5943 AS RECORDED IN VOLUME 39 OF CERTIFIED SURVEYS ON PAGES 275 AND 276 IN THE DODGE COUNTY REGISTER OF DEEDS; SAID LANDS BEING PART OF THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 AND PART OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4, SECTION 27, TOWN 12 NORTH, RANGE 14 EAST. CITY OF BEAVER DAM, DODGE COUNTY, WISCONSIN.

OWNER'S CERTIFICATE

I, the undersigned, agent for owner, of the above named property, our heirs and assigns, forever adopt the Restrictive Covenants Applicable to Zero (0) Lot Line Conditional Use, of the City of Beaver Dam, Wisconsin as recorded in Volume 605 of Records on Page 111 to 114 in the Dodge County Register of Deeds Office. Dated this 30th day of DECEMBER, 2008.

Each party acknowledges that although the easements which each enjoys over privately owned lots one of the effects of same is to provide public access to each of the respective lots and as such each lot would be considered served by public frontage onto an approved place pursuant to Section 70-2 of the Beaver Dam Municipal Code.

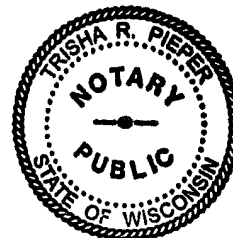


Todd Hedberg, agent
1645 N SPRING STREET, LLC

STATE OF WISCONSIN)
DODGE COUNTY)ss

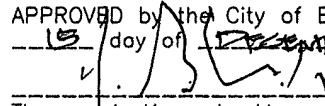
Personally came before me this 30th day of December, 2008, the above named Todd Hedberg, agent for 1645 N SPRING STREET, LLC,, to be known to be the person who executed the foregoing instrument and acknowledge the same.

Trisha R. Pieper
Notary Public, State of Wisconsin
My Commission March 22, 2009

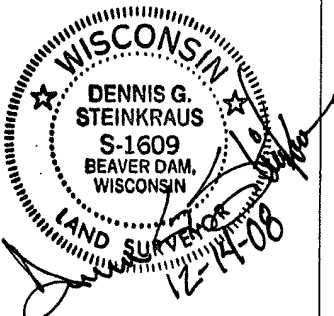


CITY APPROVAL

APPROVED by the City of Beaver Dam this
15 day of DECEMBER 2008.


Thomas A. Kennedy, Mayor

SURVEYOR'S SEAL



FIRST AMENDMENT TO DEVELOPMENT AGREEMENT

THIS FIRST AMENDMENT TO DEVELOPMENT AGREEMENT (this "First Amendment") is made and entered into this 9th day of October, 2024, by and between the City of Beaver Dam, a Wisconsin municipal corporation (the "City"), and 1645 N. Spring St., LLC, a Wisconsin limited liability company (the "Developer"). All capitalized terms not otherwise expressly defined herein shall have the same meanings as provided in the Development Agreement (as defined in the recitals below).

WITNESSETH:

WHEREAS, the City and Developer are parties to that certain Development Agreement dated effective April 15, 2024 ("Development Agreement"); and

WHEREAS, the parties desire to amend the Development Agreement on the terms and conditions set forth herein.

NOW, THEREFORE, in consideration of the foregoing promises, the mutual promises set forth herein and other good and valuable consideration, the City and Developer agree to the following:

1. Section I.(a) of the Development Agreement is hereby deleted in its entirety and replaced with the following:

a) Developer Obligations. The Developer shall:

- i) Prepare and obtain City approval for plans and specifications for the Project (the "**Plans**").
- ii) Subject to Section V.(b), complete the Project on or before July 1, 2024 as evidenced by the issuance of an occupancy permit granted by the City.
- iii) Secure all required project permits and approvals for the Project.
- iv) Secure such financing as is necessary to undertake the Project.

2. This First Amendment shall be binding upon and inure to the benefit of the parties hereto and their respective successors and assigns.

3. Except as expressly stated herein, the Development Agreement shall remain in full force and effect. If there is any conflict between the Development Agreement and the terms of this First Amendment, the terms of this First Amendment shall control.

4. This First Amendment may be executed in one or more counterparts, each of which shall be deemed an original and all of which shall constitute one and the same document with the same effect as if all parties had signed the same original. Furthermore, the undersigned

agree that transmission of this First Amendment by telecopy or via e-mail in a “PDF” format shall be deemed transmission of the original First Amendment for all purposes.

SIGNATURE PAGES IMMEDIATELY FOLLOW

IN WITNESS WHEREOF, this First Amendment has been executed by the City and Developer as of the date set forth above.

IN WITNESS WHEREOF, the Parties executed this Agreement as of the Effective Date.

CITY OF BEAVER DAM, WISCONSIN

By: Michael J. Wissell
Michael Wissell, Mayor

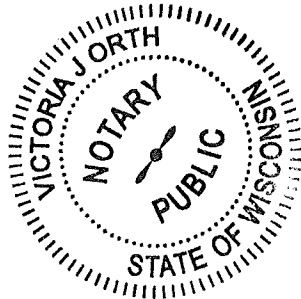
ATTEST:

Tracey Ferron
Tracey Ferron, City Clerk

Acknowledgement – City of Beaver Dam

STATE OF WISCONSIN)
)ss.
DODGE COUNTY)

Personally came before me this 10th day of October 2024, the above-named, Michael Wissell, Mayor, and Tracey Ferron, City Clerk of the City of Beaver Dam, Wisconsin, to me known to be the persons who executed the foregoing instrument and acknowledged the same.



Victoria J. Orth
Notary Public, Wisconsin
Print Name: Victoria J. Orth
My Commission: 11/26/2027

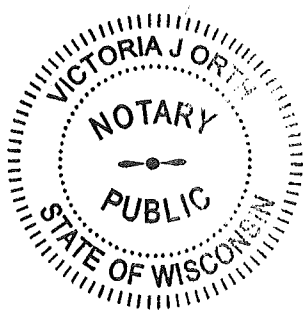
1645 N. SPRING STREET, LLC

By: [Signature]
Todd Hedberg

Acknowledgement – 1645 N. SPRING, LLC

STATE OF WISCONSIN)
) ss.
Dodge COUNTY)

Personally came before me this 9th day of Oct 2024, the above-named Todd Hedberg to me known to be the person who executed the foregoing instrument and acknowledged the same.



[Signature]
Notary Public, Wisconsin
Print Name: Victoria Orth
My Commission: 11/24/2027

LEGAL DESCRIPTION

Lot 1 of Certified Survey Map No. 6351 as recorded in Volume 43 of Certified Surveys on Page 54 in the Dodge County Register of Deeds Office; said lands being part of the South $\frac{1}{2}$ of the Southwest $\frac{1}{4}$, Section 27, Town 12 North, Range 14 East, City of Beaver Dam, Dodge County, Wisconsin.

PIN #206-1214-2733-003

14.2 Acres



City of Beaver Dam, Wisconsin
City Administrator Office

TO: Common Council
FROM: Larry Bierke
SUBJECT: Park Endowment Fund

The Issue:

At a previous meeting, the Administrative Committee authorized the City Administrator to pursue the creation of a parks endowment fund. After working with the Beaver Dam Area Community Foundation, the attached agreement was created. Attached is a resolution that will need to be adopted to authorize the City Administrator to sign the agreement and create the fund.

Considerations:

Does this item have a financial or budget impact?

Yes

To create the fund, the City will be expected to provide \$1,000. Over time, it is expected that the fund will grow and be able to provide significant support to the City's Parks and Forestry Department.

Recommendation:

Attachments:

1. Resolution No. 74-2026
2. Parks Endowed Fund

RESOLUTION NO. 74-2026

**A RESOLUTION ESTABLISHING A CITY OF BEAVER DAM
PARKS ENDOWED FUND**

WHEREAS, the City of Beaver Dam recognizes that parks, trails, forests, playgrounds, and recreational facilities are essential public assets that contribute to the health, quality of life, economic vitality and attractiveness of our community;

WHEREAS, high quality parks and recreational amenities strengthen neighborhoods, attract new residents and businesses, increase property values, and enhance Beaver Dam's long-term economic competitiveness; and

WHEREAS, the City looks to the future with a commitment of maintaining, enhancing, expanding, and preserving the inventory of parks, park amenities, and trails throughout the City; and

WHEREAS, many residents, families, businesses, and community organizations have expressed a desire to leave a lasting legacy through charitable giving for the improvement of Beaver Dam's parks; and

WHEREAS, it is the desire of the Common Council to encourage private philanthropy that will supplement, but not replace, the City's ongoing commitment to funding parks, recreation, and forestry; and

WHEREAS, the Beaver Dam Area Community Foundation has demonstrated its commitment to supporting charitable giving and community investment through the administration of charitable funds benefiting the City and providing community donors with the tax benefits of the foundation's 501(c)(3) status; and

NOW, THEREFORE, BE IT RESOLVED that the City of Beaver Dam hereby authorizes the City Administrator to enter into an agreement with the Beaver Dam Area Community Foundation, an affiliate member of the Fond du Lac Area Foundation, to establish the City of Beaver Dam Parks Endowed Fund as a permanent charitable endowment to benefit the City's Parks and Forestry Department.

Presented by the Administrative Committee.

By a vote of: _____ in favor, _____ opposed, and _____ abstain.

Approved: August 3, 2026

Roberta Marck
Mayor

Attested: August 3, 2026

Tracey M. Ferron
City Clerk



City of Beaver Dam Parks Endowed Fund

An agency endowment fund within the

Beaver Dam Area Community Foundation Family of Funds

The City of Beaver Dam to establish a charitable fund within the Beaver Dam Area Community Foundation Family of Funds, administered by the Fond du Lac Area Foundation. We understand that this fund will be recognized and celebrated by the leadership of the Beaver Dam Area Community Foundation Family of Funds, and that those same individuals will monitor the ongoing administration of this fund by reviewing the fund's grant making, financial activities, and other operations on a regular basis as provided in the Affiliate Agreement between the Beaver Dam Area Community Foundation and the Fond du Lac Area Foundation.

The City of Beaver Dam has provided for an irrevocable gift to establish this fund. This gift, together with any similarly directed gifts from any donor, shall be held and maintained as a component fund within the Foundation and administered as follows:

1. **Name of Fund:** This fund shall be known as the City of Beaver Dam Parks Endowed Fund.
2. **Fund Purpose:** This fund is established for the purpose of supporting the City of Beaver Dam Parks and Forestry Department.
3. **Recipients of Fund Distributions:** Distributions shall be made from this fund to the City of Beaver Dam in Beaver Dam, WI. In the event that the City's Park and Forestry Department or any successor organizations should cease to exist or to carry out a charitable purpose, distributions shall be made instead as directed by the Foundation's Board of Directors, in its sole discretion, to one or more organizations serving a charitable purpose of impacting parks and open spaces in Beaver Dam.
4. **Amounts Available for Distribution:** Each year, the Foundation shall distribute four percent (4%) of the fund assets averaged over five calendar years to the City of

Beaver Dam to be used to support the maintenance and care of Beaver Dam City Parks.

5. **Investment of Fund Assets:** The Foundation shall oversee the investment management of the fund assets. The Foundation's Board of Directors shall have all powers necessary or, in its sole discretion, desirable to fulfill this obligation, including but not limited to the power to retain, invest, and reinvest the fund assets and to commingle the fund assets with those of other funds for investment purposes.
6. **Obligation to Ensure Charitable Use of Fund:** As a component fund of the Foundation, this fund is subject to the applicable provisions of the Internal Revenue Code and related Federal laws and regulations, to the laws of the State of Wisconsin, and to the provisions of the Foundation's Articles of Incorporation and Bylaws. These authorities require that the Foundation's Board of Directors, acting in its sole discretion, shall have the power and the duty to modify any restriction or condition of this fund that has become unnecessary, incapable of fulfillment, or inconsistent with the Foundation's charitable purposes or the needs of the community served by the Foundation.

We hereby confirm that the provisions set forth above describe the intent of the City of Beaver Dam in establishing this fund.

Larry Bierke, City of Beaver Dam City Administrator

Date

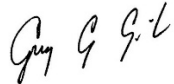


6/19/2026

Tom Heffron, BDACF Board President

Date

Accepted on behalf of the Fond du Lac Area Foundation



Greg Giles, Executive Director, FDLAF

Date

Fund contact info: Larry Bierke
d: (920) 356-2549 c: (608) 345-8751
a: 205 S. Lincoln Ave, Beaver Dam, WI 53916
e: lbierke@ci.beaverdam.wi.gov



City of Beaver Dam, Wisconsin
City Clerk Office

TO: Common Council
FROM: Larry Bierke
SUBJECT:

The Issue:

The Lake Development Corporation has been awarded a \$16,324 grant from the DNR to replace the pier at Waterworks Park. The Development Corporation can no longer accept grants from the DNR under new grant regulations for this program and the Development Corporation would like the city to accept the grant.

Considerations:

Does this item have a financial or budget impact?

Yes

This resolution would allow the City to accept a \$16,324 grant for replacing a Waterworks Park pier.

Recommendation:

Attachments:

1. Resolution No. 75-2026

RESOLUTION NO. 75-2026

A RESOLUTION AUTHORIZING OUTDOOR RECREATION GRANT APPLICATIONS

WHEREAS, The City of Beaver Dam, Wisconsin, is interested in acquiring or developing lands for public outdoor recreation purposes as described in the applications; and

WHEREAS, financial aid is required to carry out the project.

THEREFORE, BE IT RESOLVED, that The City of Beaver Dam, Wisconsin, has budgeted a sum sufficient to complete the project or acquisition; and

HEREBY AUTHORIZES Benjamin Larson, Beaver Dam Lake Development Corporation Chairman to act on behalf of The City of Beaver Dam, Wisconsin, to:

- a) Submit an application to the State of Wisconsin Department of Natural Resources for any financial aid that may be available.
- b) Submit reimbursement claims along with necessary supporting documentation within 6 months of project completion date.
- c) Submit signed documents; and
- d) Take necessary action to undertake, direct and complete the approved project.

BE IT FURTHER RESOLVED, that The City of Beaver Dam, Wisconsin, will comply with State or Federal rules for the programs; may perform force amount work; will maintain the completed project in an attractive, inviting, and safe manner; will keep the facilities open to the general public during reasonable hours consistent with the type of facility; and will obtain from the State of Wisconsin Department of Natural Resources or the National Park Service approval in writing before any change is made in the use of the project site.

By a vote of _____ in favor, _____ opposed, and _____ abstain.

Approved: August 3, 2026

Roberta Marck
Mayor

Attested: August 3, 2026

Tracey M Ferron
City Clerk



City of Beaver Dam, Wisconsin
City Administrator Office

TO: Common Council
FROM: Larry Bierke
SUBJECT:

The Issue:

The City of Beaver Dam seeks to provide a competitive, equitable, and sustainable total compensation program to support recruitment, retention, transparency, fiscal stability, fairness and organizational effectiveness.

In April 2026 the City completed a salary survey that identified 16 positions that had fallen below the minimum compensation range of comparable communities. During the City Council discussion, it became apparent that compensating staff at a minimum level was not going to allow the City to compete in the labor market, nor would it treat knowledgeable workers or high-performing workers equitably in comparison to both the public and private job sector.

Considerations:

At the April 21, 2026 City Council meeting, the City Administrator was directed to move forward with a Classification, Compensation, and Benefit Study and establish a wage grid for city staff. The City Administrator drafted a request for proposals and received six responses to the request for proposals. The proposal selected for recommendation to the City Council was from the Archer Company for a cost not to exceed \$44,120.

Does this item have a financial or budget impact?

No

This budget amendment moves funding from the general fund to an account where it can be spent. A separate agenda item will ask the City Council to spend the funds on a contract with The Archer Company.

Recommendation:

Staff recommends considering and adopting a budget amendment to move \$44,120 from the General Fund Balance to Professional Services Account to engage The Archer Company to complete a classification and compensation wage grid for the City of Beaver Dam.

Attachments:

1. Resolution No. 76-2026

RESOLUTION NO. 76-2026

**A RESOLUTION AMENDING THE BUDGET OF THE
CITY OF BEAVER DAM, WISCONSIN FOR THE FISCAL YEAR 2026**

WHEREAS, the Common Council of the City of Beaver Dam, Wisconsin adopted the 2026 Budget on November 17, 2025; and

WHEREAS, Wis. Stat. § 65.90(5)(a) authorizes the governing body to amend the adopted budget by two-thirds vote of the entire membership of the governing body; and

WHEREAS, circumstances have arisen since adoption of the 2026 Budget necessitating the appropriation of funds for anticipated professional services related to a classification, compensation and benefits study; and

WHEREAS, increased building permit revenues in 2025 and 2026 from large development activity have increased available General Fund resources and contributed to the availability of unassigned fund balance to support said anticipated expenditures;

NOW THEREFORE BE IT RESOLVED, that the Common Council of the City of Beaver Dam does hereby adopt the 2026 Budget amendments as follows:

Fund	Budget Amendment
General Fund Expenses	
General Government	
Professional Services	\$44,120
General Fund Revenues	
Other Financing Sources	
Fund Balance Applied	\$44,120

BE IT FURTHER RESOLVED, that the City Administrator is hereby authorized to execute an agreement with The Archer Company for property a Classification, Compensation and Benefits Study, in an amount not to exceed \$44,120 within the budget authority established by this resolution.

BE IT FURTHER RESOLVED, that the Finance Director is authorized to make the appropriate accounting entries to implement this amendment.

Presented by the Common Council

By a vote of _____ in favor, _____ opposed, and _____ abstain.

Approved: August 3, 2026

Bobbi Marck
Mayor

Attested: August 3, 2026

Tracey M. Ferron
City Clerk



City of Beaver Dam, Wisconsin
City Administrator Office

TO: Common Council
FROM: Larry Bierke
SUBJECT: Wage Grid Contract

The Issue:

The City Administrator recently completed a request for proposals for a classification and compensation study. This request for proposals generated six responses from consulting firms in this line of work. A City team evaluated the six respondents and interviewed the top two firms. The Archer Company was the highest-ranked proposer based on the City's evaluation criteria in the RFP.

Considerations:

The RFP denoted that consulting services would be ranked based on project methodology, qualifications of assigned staff, cost of proposal, municipal experience, and references of work quality.

Does this item have a financial or budget impact?

Yes

Approving this contract would result in an expense of \$44,120 to the Archer Company for consulting services.

Recommendation:

Staff recommends consideration of the attached resolution to move forward with The Archer Company to facilitate the creation of a city staff wage grid.

Attachments:

1. Resolution No. 77-2026
2. Archer Company Contract
3. Beaver Dam WI RFP

RESOLUTION NO. 77-2026

RESOLUTION AUTHORIZING THE CITY ADMINISTRATOR TO EXECUTE A CONSULTING SERVICES CONTRACT WITH THE ARCHER COMPANY FOR A CLASSIFICATION AND COMPENSATION STUDY

WHEREAS, the City of Beaver Dam periodically reviews its employee classification and compensation system to ensure that compensation practices remain competitive, equitable, and aligned with the City's organizational goals; and

WHEREAS, the City solicited proposals from qualified consulting firms to perform a comprehensive Classification and Compensation Study; and

WHEREAS, following review and evaluation of the proposals received, The Archer Company was determined to be the firm best qualified to provide the requested professional services; and

WHEREAS, The Archer Company has submitted a Consulting Services Contract to conduct the Classification and Compensation Study for a total amount not to exceed **Forty-Four Thousand One Hundred Twenty Dollars (\$44,120.00)**; and

WHEREAS, the Common Council finds that entering into this agreement is in the best interests of the City of Beaver Dam and its employees.

NOW, THEREFORE, BE IT RESOLVED, by the Common Council of the City of Beaver Dam, Dodge County, Wisconsin, that the Consulting Services Contract between the City of Beaver Dam and The Archer Company, substantially in the form presented to the Common Council, is hereby approved.

BE IT FURTHER RESOLVED, that the City Administrator is hereby authorized and directed to execute the Consulting Services Contract and any non-substantive documents necessary to implement the agreement, subject to approval as to legal form by the City Attorney.

Adopted by the Common Council of the City of Beaver Dam, Wisconsin, this 3rd day of August, 2026.

By a vote of: _____ in favor, _____ opposed, and _____ abstain.

Approved: August 3, 2026

Roberta Marck
Mayor

Attested: August 3, 2026

Tracey M Ferron
City Clerk

CONSULTING SERVICES CONTRACT

by and between

City of Beaver Dam, Wisconsin

and

The Archer Company

THIS CONSULTING SERVICES CONTRACT (the “Contract”), is made and entered into this ____ day of August, 2026, by and between the City of Beaver Dam, Wisconsin, a Wisconsin municipal corporation (the “Client”), and The Archer Company, LLC, an Ohio limited liability company with its principal place of business located at 7652 Sawmill Road, #295, Dublin, Ohio 43016. As used herein, the Client and The Archer Company may be collectively referred to as the “parties” and individually as a “party.”

WHEREAS, the Client has a present need for professional services to assist and advise the Client with conducting a Classification and Compensation Study update; and

WHEREAS, The Archer Company has unique education, training and/or experience in the business of Classification and Compensation Plan development; and

WHEREAS, the Client desires to avail itself of the advice and professional assistance of The Archer Company, and The Archer Company is willing to provide such services, advice and assistance to the Client all upon the terms and conditions set forth herein.

NOW, THEREFORE, in consideration of mutual promises contained herein and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, The Archer Company and the Client agree as follows:

ARTICLE 1 – AGREEMENT AND TERM

1.1 Scope. The above-referenced recitals are incorporated into this Contract. The full scope of this Contract is included in the attached proposal, which is attached hereto and fully incorporated herein as “Schedule A”.

1.2 Term. The initial term of this Contract shall commence within thirty (30) days of contract approval by Client; and unless earlier terminated in accordance with the provisions of this Contract, shall continue in effect for a period of six (6) months from the commencement date. The parties may mutually agree to extend the term of the Contract for thirty (30) day periods as they deem necessary and at no additional cost to the Client. The term of the Contract will be deemed to include such renewal periods.

1.3 [Intentionally omitted.]

ARTICLE II – SCOPE OF WORK

- 2.1 Rendering of Services. The Archer Company hereby agrees to render the services identified in Schedule A and the Statement of Work (collectively, the Services”) according to the schedules contained therein. In the event any of the Services are or will be delayed, The Archer Company shall promptly notify the Client in writing.

ARTICLE III – PAYMENT AND INVOICING

- 3.1 Price. The Client shall pay the Archer Company for Services completed, provided, the total price of the Services shall not exceed \$44,120.
- 3.2 Invoicing; Payment. The Archer Company shall issue monthly invoices, itemizing the Services completed during that period. The Client shall pay invoices on or before the date that is 45 days after the Client’s receipt of the invoice.

ARTICLE IV - INDEMNITIES AND LIABILITIES

- 4.1 Subcontracting. This Contract was awarded to The Archer Company based upon unique qualifications and skills, and no task required to be performed under this contract shall be subcontracted to third parties without the express written consent of the Client.
- 4.2 Condition Precedent to Indemnification. The indemnities in Article IV are conditioned upon the Client providing written notice within a reasonable time frame of the claim, allegation or action for which indemnification is sought, together with full information and reasonable cooperation and reasonable opportunity to control the response thereto and the defense thereof.
- 4.3 Indemnification for Infringement. The Archer Company warrants that the Client will have the full right to use the work product delivered to the Client and that it will not infringe upon the rights of any third party. In the event a claim is made against the Client for infringement, The Archer Company will defend all such claims on the Client’s behalf and indemnify and hold the Client harmless from all liability (including legal fees) provided:
- (a) The Client notifies The Archer Company of the claim within a reasonable time of being notified of the same;
 - (b) the Client reasonably cooperates with The Archer Company in The Archer Company’s resolution of the claim; and
 - (c) the claims shall not have arisen due to the Client’s negligent acts.
- 4.4 Warranties. All of the Services shall be performed by qualified personnel and shall be of a professional quality conforming to best practices of the industry.

The end system shall be fit for the intended use previously identified herein, and

shall be capable of processing data without error, and without causing system lockups.

If any services do not meet this warranty, The Archer Company shall do everything necessary, without charge, to bring its services to the specified level. In order to obtain warranty service, the problem must be reported within 180 days of delivery of the system in question.

ARTICLE V - DISPUTE RESOLUTION AND TERMINATION

5.1 Termination for Default. Either party may terminate this Contract (the “Terminating Party”) if the Terminating Party determines that the other party (the “Defaulting Party”) has failed satisfactorily to fulfill the Defaulting Party’s obligations and responsibilities hereunder and is unable to cure such failure within a reasonable period of time, not to exceed thirty (30) calendar days or such longer period of time as may be specified in writing by the Terminating Party, taking into consideration the gravity and nature of the default. Such termination shall be referred to as “Termination for Default”. Upon determination by either party hereto that the other has failed to satisfactorily perform its obligations and responsibilities hereunder, the Terminating Party shall notify the Defaulting Party in writing of the failure and of the time period that has been established to cure such failure (the “Default Notice”), which time period shall be not less than ten (10) days (together with the 30 days above, the “Cure Period”). If the Defaulting Party is unable to cure its default within the Cure Period, the Terminating Party may, by giving written notice thereof (the “Termination Notice”) to the Defaulting Party, terminate this Contract as of the date specified in the Termination Notice. If the Client is the Terminating Party, The Archer Company shall be paid for all Services and/or materials provided to and accepted by the Client on or prior to the date of termination. The previous sentence notwithstanding, if the Client’s termination is due to The Archer Company’s failure to satisfactorily provide any portion of the Services, the Client may withhold payment for those Services unless The Archer Company cures its default within the Cure Period. If the entire fee provided in Section 3.1 of this Contract has already been remitted by Client to The Archer Company, and The Archer Company has failed to complete its work provided hereunder, Client shall be entitled to a refund and return of all such sums paid.

5.2 Termination for Financial Instability. In the event that The Archer Company becomes financially unstable to the point of (i) ceasing to conduct business in the normal course, (ii) making a general assignment for the benefit of creditors, or (iii) suffering or permitting the appointment of a receiver for its business or its assets, or there is a filing by or against of a meritorious petition in bankruptcy under any bankruptcy or debtor’s law, the Client may, at its option, immediately terminate this Contract under Section 5.1, the “Termination for Default” clause, by giving written notice thereof.

ARTICLE VI – MISCELLANEOUS

6.1 Notices. Wherever one party is required or permitted to give notice to the other pursuant to this Contract, such notice shall be deemed given when delivered by

hand, via certified mail with return receipt requested, via overnight courier with signature required, and addressed as follows:

In the case of the Client:

Attn: Mr. Larry Bierke
City Administrator
City of Beaver Dam
205 S. Lincoln Avenue
Beaver Dam, WI 53916

In the case of The Archer Company:

James Battigaglia
President
The Archer Company
7652 Sawmill Road, #295
Dublin, OH 43016

Either party may from time to time change its designated recipient or address for notification purposes by giving the other party written notice of the new designated recipient or address and the date upon which it will become effective.

- 6.2 Severability. If, and only to the extent that, any provision of this Contract is declared or found to be illegal, unenforceable or void, then both parties shall be relieved of all obligations arising under such provision, it being the intent and agreement of the parties that this Contract shall be deemed amended by modifying such provision to the extent necessary to make it legal and enforceable while preserving its intent. If that is not possible, another provision that is legal and enforceable and achieves the same objective shall be substituted. If the remainder of this Contract is not affected by such declaration or finding and is capable of substantial performance, then the remainder shall be enforced to the extent permitted by law.
- 6.3 Waiver. No delay or omission by either party in the exercise of any right or power shall impair any such right or power or be construed to be a waiver thereof. A waiver by either of the parties of any of the covenants, conditions or agreements to be performed by the other or any breach thereof shall not be construed to be a waiver of any succeeding breach thereof or of any other covenant, condition or agreement herein contained. No change, waiver, or discharge hereof shall be valid unless in writing and signed by an authorized representative of the party against which such change, waiver, or discharge is sought to be enforced.
- 6.4 Public Records. The Archer Company acknowledges and agrees that the Services, communications related thereto, and other documents and communications related to this Contract may be subject to disclosure under the Wisconsin Public Records Law.

- 6.5 Record Audit Retention. The Archer Company agrees to make all pertinent contractual books and records and other documents pertaining to this Contract available to the Client and its designated agents for purpose of audit and examination upon reasonable request during the term of this Contract and for a period of two (2) years from the expiration date or final payment under this Contract, whichever is later.
- 6.6 Headings and Interpretation. The article and section headings used herein are for reference and convenience only and shall not enter into the interpretation hereof.
- 6.7 Governing Law. This Contract shall be subject to interpretation under the laws of the State of Wisconsin.
- 6.8 Assignment. The Archer Company shall not assign, transfer, convey or otherwise dispose of this Contract, or its right to execute it, or its right, title or interest in or to it or any part thereof, or assign, by power of attorney or otherwise, any of the monies due or to become due under this Contract without approval of the Client by resolution.
- 6.9 Electronic Signature; Counterparts. This Contract may be executed in counterparts, all of which when so executed will be deemed to be an original and all of which taken together will constitute one and the same agreement. This Contract may be executed by any electronic means (e.g., DocuSign or other electronic process), and delivery of an executed counterpart of a signature page to this Contract by facsimile transmission or other electronic transmission will be as effective as delivery of a manually executed counterpart of this Contract.
- 6.10 Entire Agreement of Parties and Modification. This Contract, including any Schedules and documents referred to in this Contract or attached hereto, each of which is incorporated herein, constitutes the entire and exclusive statement of the agreement between the parties with respect to its subject matter and there are no oral or written representations, understandings or agreements relating to this Contract which are not fully expressed herein. The parties agree that any other terms or conditions included in any quotes, acknowledgments, bills of lading or other forms utilized or exchanged by the parties shall not be incorporated herein or be binding unless expressly agreed upon in writing by authorized representatives of the parties. No modification change or amendment hereof shall be valid unless such is in writing and signed by the authorized representative of the party against which such modification, change or amendment is sought to be enforced.
- 6.11 Relationship of Parties. The Archer Company is performing pursuant to this Contract only as an independent contractor. The Archer Company has the sole obligation to supervise, manage, contract, direct, procure, perform or cause to be performed its obligations set forth in this Contract, except as otherwise agreed upon by the parties. Nothing set forth in this Contract shall be construed to create the relationship of principal and agent between The Archer Company and the Client. Neither party shall act or attempt to act or represent itself, directly or by implication, as an agent of the other party or its affiliates or in any manner assume or create any obligation on behalf of, or in the name of the other party or its

affiliates.

6.12 Force Majeure. Neither party will be liable to the other party hereunder or be deemed to be in breach of this Contract for any failure or delay in rendering performance arising out of causes beyond its reasonable control and without its fault or negligence. Such causes may include but are not limited to, acts of God or the public enemy, acts of the government, the other party hereto, or third parties (excluding subcontractors or agents), fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes and unusually severe weather.

IN WITNESS WHEREOF, the Client and The Archer Company have each caused this Contract to be signed and delivered by its duly authorized representative as of the date first written above.

THE ARCHER COMPANY

BY: _____

Print Name: _____

Title: _____

CLIENT:

NOW, THEREFORE, the City of Beaver Dam, Wisconsin, on this _____ day of July, 2026, hereby approves entry into this Contract.

CITY OF BEAVER DAM, WISCONSIN

BY: _____
Mr. Larry Bierke, City Administrator

Approved as to legal form:

SCHEDULE A

REQUEST FOR PROPOSALS

Classification, Compensation, and Benefits Study

Issue Date: June 1, 2026

Proposal Due Date: July 10, 2026

The City of Beaver Dam (“City”) is requesting proposals from qualified consulting firms to conduct a comprehensive classification, compensation, and benefits study for municipal employees and to assist the City in developing a modern, equitable, and competitive compensation structure.

The City seeks a consultant with demonstrated experience performing compensation and classification studies for Wisconsin municipalities or similar sized local governments.

The selected consultant shall evaluate the City’s current compensation system, compare wages and benefits to relevant labor markets, assess internal equity, and recommend a compensation structure and wage grid that supports recruitment, retention, transparency, fairness, fiscal sustainability, and organizational effectiveness.

The purpose of this project is to:

- Evaluate the competitiveness of the City’s compensation and benefits programs;
- Ensure internal equity among positions;
- Review current job classifications and organizational structure;
- Identify compensation compression or inequities;
- Assist the City in attracting and retaining qualified employees;
- Develop an updated wage grid/pay plan that appropriately rewards longevity, performance, and professional growth;
- Provide recommendations for implementation and long-term maintenance of the compensation system; and
- Ensure the compensation system aligns with the City’s strategic goals and financial capabilities.
- Provide education and training to City staff regarding wage grid administration, implementation, and long-term benefits.

The City of Beaver Dam is a Wisconsin municipality providing a full range of municipal services including administration, public safety, public works, utilities, parks and recreation, and engineering.

The City currently employs approximately 141 full-time employees and 12 part-time employees across multiple departments. This study is intended to focus primarily on non-represented positions, which reduces the full-time employees studied down to 92.

The City's current compensation structure has evolved over time, and the City desires a comprehensive review to ensure wages and benefits remain competitive and equitable. The current structure includes premium pay, longevity, and other compensation components that the City would like evaluated for possible consolidation into a more transparent compensation structure.

The City may provide the following information to the selected consultant:

- Organizational chart;
- Existing job descriptions;
- Current wage schedules;
- Employee census data;
- Benefit summaries;
- Personnel policies;
- Historical compensation adjustments; and
- Budget information.

The selected consultant shall provide professional services including, but not limited to, the following:

Project Initiation and Planning

- Conduct a project kickoff meeting with City administration;
- Review project objectives, schedule, and communication expectations;
- Identify data needs and establish project milestones;
- Develop a detailed work plan.

Review of Existing Classification System

- Review current organizational structure and position classifications;
- Evaluate job descriptions for accuracy and consistency;
- Recommend revisions to job classifications where appropriate;
- Identify positions that may be improperly classified;
- Review supervisory relationships and organizational alignment;
- Review Fair Labor Standards Act (FLSA) classifications.

Compensation Analysis

- Evaluate the City's current wage structure;
- Analyze internal equity among positions;
- Identify wage compression issues;
- Review pay progression practices;
- Evaluate compensation philosophy and administration practices;
- Compare wages with comparable Wisconsin municipalities and relevant labor markets.

The consultant shall recommend an appropriate market comparison group and provide rationale for the selected comparables.

Benefits Review

- Review the City's employee benefits package;
- Compare benefits offerings with comparable municipalities;
- Identify strengths, weaknesses, and areas for improvement;
- Evaluate total compensation competitiveness.

Employee Handbook Review

The City of Beaver Dam has many benefits included in the existing employee handbook. It is the City's desire to modify the handbook to update benefit terms, identify potential policy, operational, or compliance concerns for further legal review by the City Attorney, and have a consultant recommend modifications to said handbook.

Market Salary Survey

The consultant shall conduct a salary survey using an existing list of comparable municipalities and organizations. The survey should consider factors including:

- Population;
- Geographic location;
- Organizational structure;
- Service levels;
- Workforce size;
- Economic conditions; and
- Municipal type.

The consultant shall provide:

- Market comparison data;
- Salary range comparisons;
- Position benchmark analysis;
- Summary findings and recommendations.

Development of Compensation Structure

The consultant shall develop recommendations for an updated compensation structure, including:

- Wage grid or pay plan;
- Pay grades and salary ranges;
- Pay progression methodology;
- Internal alignment recommendations;
- Market positioning recommendations;
- Recommendations for non-represented employee compensation;
- Recommendations related to merit, step, or performance system.

The consultant should provide phased implementation options, including estimated annual budget impacts under multiple implementation scenarios.

Presentations and Final Report

The consultant shall plan for two in person updates to the Administrative Committee and a final in person presentation to the Beaver Dam City Council. Regular meetings with city human resources staff shall also be part of the proposal.

The consultant shall prepare a final report summarizing:

- Methodology;
- Findings;
- Market analysis;
- Compensation recommendations;
- Classification recommendations;
- Benefits analysis;
- Wage grid/pay structure recommendations;
- Implementation strategy;
- Estimated fiscal impacts.

The consultant shall present draft findings and recommendations to City administrator and the Administrative Committee and final recommendations to the City Council.

All work products, data, reports, and supporting materials produced under this project shall become the property of the City of Beaver Dam.

DELIVERABLES

The selected consultant shall provide the following deliverables:

1. Project work plan and schedule;
2. Market comparison methodology;
3. Updated classification recommendations;
4. Compensation and benefits analysis;
5. Recommended wage grid/pay structure in editable format;
6. Draft report for City review;
7. Final written report;
8. Electronic copies of all reports and supporting data;
9. Presentation materials for governing body meetings.
10. Two Implementation presentations to City Staff after proposal is approved by City Council.

PROJECT TIMELINE

The City anticipates the following project schedule:

Milestone	Date
RFP Issued	June 1, 2026
Questions Due	June 12, 2026 to vorth@ci.beaverdam.wi.gov
Responses Issued	June 19, 2026 to all prospective bidders
Proposals Due	July 10, 2026
Interviews (if needed)	July 16/17 via zoom
Consultant Selected	August 3, 2026 City Council meeting
Draft Report	October 12, 2026
Final Report	November 9, 2026

The City reserves the right to modify the project timeline.

PROPOSAL REQUIREMENTS

Proposals shall include the following information:

A. Cover Letter

Include:

- Name of firm;
- Primary contact person;

- Address, telephone number, and email address;
- Statement of interest;
- Signature of authorized representative.

B. Firm Qualifications

Provide:

- Firm history and overview;
- Experience with municipal compensation and classification studies;
- Experience working with Wisconsin municipalities;
- Qualifications of staff assigned to the project;
- Resumes of key personnel.

C. Project Approach and Methodology

Describe:

- Proposed project methodology;
- Approach to market analysis;
- Approach to classification review;
- Data collection methods;
- Communication strategy;
- Proposed schedule.

D. References

Provide at least three references from Wisconsin municipalities or local government clients for whom similar work has been completed within the past five years.

Include:

- Organization name;
- Contact person;
- Telephone number;
- Email address;
- Brief description of project.

E. Sample Work Product

Provide examples of similar compensation or classification studies completed for municipalities.

F. Fee Proposal

Provide:

- Total project cost;
- Hourly rates for assigned personnel;
- Breakdown of project phases/tasks;
- Reimbursable expenses;
- Any optional services.

The fee proposal shall remain valid for at least ninety (90) days. The City prefers a fixed-fee proposal with clearly identified optional services.

EVALUATION CRITERIA

Proposals may be evaluated using criteria including:

Criteria	Weight
Municipal Experience	15%
Project Methodology	25%
Qualifications of Assigned Staff	25%
Cost Proposal	25%
References and Work Quality	10%

The City reserves the right to conduct interviews with selected firms.

SUBMISSION INSTRUCTIONS

Proposals shall be submitted no later than:

Date: July 10th, 2026

Time: 1:00 PM

Submit proposals electronically as pdf's to:

City of Beaver Dam, WI
Attn: Vicky Orth, Human Resources
205 S. Lincoln Avenue
Beaver Dam, WI 53916
Email: vorth@ci.beaverdam.wi.gov

Late proposals may not be considered.

GENERAL CONDITIONS

The City reserves the right to:

- Reject any or all proposals;
- Waive informalities or irregularities;
- Request additional information from proposers;
- Negotiate scope or fees with selected firms;
- Cancel or modify the RFP process;
- Select the proposal deemed in the best interest of the City.

All materials submitted in response to this RFP may become public records subject to Wisconsin public records laws.

The selected consultant shall comply with all applicable federal, state, and local laws.

QUESTIONS

Questions regarding this Request for Proposals shall be directed to:
vorth@ci.beaverdam.wi.gov

Questions must be submitted by the date identified in the project timeline.

ATTACHMENTS

The City may provide the following attachments as requested:

- Organizational Chart
- Current Wage Schedule
- Job Descriptions
- Benefit Summary
- Collective Bargaining Agreements
- Personnel Policies