# Finance/Personnel Committee

**Regular Meeting**

**Revised Agenda**

335 South Broadway
De Pere, WI 54115
https://www.deperewi.gov/

**Tuesday, May 14, 2024** | **7:30 PM** | **Council Chambers and Virtual**

Pursuant to Wisconsin Statute 19.84, Notice is hereby given to the public that a meeting of the **Finance/Personnel Committee** of the City of De Pere will be held on **May 14, 2024** at **7:30 PM** in the **COUNCIL CHAMBERS, 2ND FLOOR CITY HALL, 335 S. BROADWAY STREET. DE PERE.**

**The Public or Members of the Finance/Personnel Committee, which may count toward an official quorum, may attend the meeting either in person in the Council Chambers or telephonically or electronically via video conferencing or other appropriate technological means. Telephonic or electronic access to the meeting is provided below:**

**Computer/smart phone accessing** https://www.gotomeet.me/DePere

**OR**

**You can also dial in using your phone.**
United States (Toll Free): 1 866 899 4679
United States: +1 (312) 757-3117
**Access Code:** 154-883-285

***This meeting may also be rebroadcast on Spectrum Cable Channel 4 and AT&T U-verse Channel 99 throughout the week and available on demand at http://deperecitywi.iqm2.com/.***

Call to Order

1. Roll Call
2. Election of the Vice Chair of the Finance/Personnel Committee.
3. Approval of minutes from April 9, 2024 Regular Meeting of the Finance Personnel Committee.
4. Public comment upon matters not on the agenda. Comments made during the public comment period shall pertain only to matters under the jurisdiction of the Finance and Personnel Committee. §6-3(f) DPMC
5. Fire Department Overtime and LifeQuest Billing Reports for April, 2024.
6. Consideration and Possible Action to allow surplus vehicles and equipment to be auctioned with proceeds going to the selling department's vehicle maintenance account. *
7. Consideration and Possible Action on City Hall Floor 1 Data Center Cooling Redundancy – Approval of Reallocation of ARPA Funding.*
8. Consideration and Possible Action to hire Affion Public recruitment firm to conduct a City Administrator recruitment. *
9. Consideration and Possible Action on Regulation of ATV/UTV's on City Streets. *
10. Consideration and Possible Action on a proposed Purchase/Sale Agreement Terms for Enterprise Drive (Parcel ED-2077-1).*
11. Consideration and Possible Action to Award a Contract for Environmental Consulting Services with Stantec. *

12. Consideration and Possible Action on purchase of Tyler Technologies employee access module.*
13. Consideration and Possible Action regarding proposed resolution to extend the time period allowed to recognize Reimbursable Grant Revenues after the end of the Fiscal Period. *
14. Consideration and Possible Action on the City of De Pere Investment and Cash Detail, March 2024.
15. Future agenda items.
16. Adjournment

Any person wishing to attend this meeting who, because of disability, requires special accommodations should contact the Clerk's office at 339-4050 by Noon, the previous day so that arrangements can be made.

***Items with an asterisk require City Council approval.**

Agenda Sent To:
Alderpersons
City Administrator
Mayor
Department Heads
TV, Newspapers & Radio Stations
Kress Family Library
De Pere Chamber of Commerce

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **City Attorney** |
| **FROM:** | **Amy Darnick** |
| **SUBJECT:** | **Election of the Vice Chair of the Finance/Personnel Committee.** |

Section 6-4(c) of the De Pere Municipal Code requires the Committee to annually elect a vice chair.

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **City Attorney** |
| **FROM:** | **Amy Darnick** |
| **SUBJECT:** | **Approval of minutes from April 9, 2024 Regular Meeting of the Finance Personnel Committee.** |

**ATTACHMENTS:**

- April 9, 2024- DRAFT (PDF)

# Finance/Personnel Committee

335 South Broadway
De Pere, WI 54115
https://www.deperewi.gov/

**Regular Meeting**

**Draft Minutes**

**Tuesday, April 9, 2024** **7:30 PM** **Council Chambers and Virtual**

1. Call to Order

The meeting was called to order at 7:30 PM by Mayor James Boyd

| Attendee Name | Title | Status | Arrived |
|---|---|---|---|
| Devin Perock | Alderperson | Present | |
| Pamela Gantz | Alderperson | Remote | |
| James Boyd | Mayor | Present | |
| Amy Chandik Kundinger | Alderperson | Present | |
| John Quigley | Alderperson | Present | |

Also present: City Administrator Larry Delo, City Attorney Tony Wachewicz, Fire Chief Al Matzke, Health Director/Officer Chrystal Woller, Development Services Director Dan Lindstrom, Finance Director/Treasurer Pamela Manley, Human Resources Director Shannon Metzler (remote), Police Chief Jeremy Muraski (remote), members from Amerilux.

2. Approval of minutes from March 12, 2024 Regular Meeting of the Finance Personnel Committee.

| | |
|---|---|
| **RESULT:** | **ADOPTED [UNANIMOUS]** |
| **MOVER:** | Devin Perock, Alderperson |
| **SECONDER:** | John Quigley, Alderperson |
| **AYES:** | Perock, Gantz, Boyd, Kundinger, Quigley |

3. Public comment upon matters not on the agenda. Comments made during the public comment period shall pertain only to matters under the jurisdiction of the Finance and Personnel Committee. §6-3(f) DPMC

None

4. Fire Department Overtime and LifeQuest Billing Reports for March, 2024.

| | |
|---|---|
| **RESULT:** | **ADOPTED [UNANIMOUS]** |
| **MOVER:** | James Boyd, Mayor |
| **SECONDER:** | Amy Chandik Kundinger, Alderperson |
| **AYES:** | Perock, Gantz, Boyd, Kundinger, Quigley |

5. Consideration and Possible Action on the March 2024 Police Overtime Report.

| | |
|---|---|
| **RESULT:** | **ADOPTED [UNANIMOUS]** |
| **MOVER:** | Amy Chandik Kundinger, Alderperson |
| **SECONDER:** | Devin Perock, Alderperson |
| **AYES:** | Perock, Gantz, Boyd, Kundinger, Quigley |

6. Consideration and Request to Accept $38,101 grant from Firehouse Subs Public Safety Foundation for the purchase of 17 defibrillators (AEDs) *

Chief Muraski mentions this was Srgt. VandenBusch's first time filling out a grant application.

| | |
|---|---|
| **RESULT:** | **ADOPTED [UNANIMOUS]** |
| **MOVER:** | Amy Chandik Kundinger, Alderperson |
| **SECONDER:** | James Boyd, Mayor |
| **AYES:** | Perock, Gantz, Boyd, Kundinger, Quigley |

7. Consideration and Request to allow over-hire for Police Officer for 2024, and for subsequent years as needed. *

Chief Muraski was remote to talk about this over-hire request. Last year the Council approved to add a little extra money to the budget in order to over-hire because of the amount of time it takes to go from finding out you will have a vacancy to go through the hiring process, train that officer, and complete everything for when they start their solo patrol. It usually is about an 8-9 month process. They are asking to use that over-hire for 2024. They are currently one position short of the normal full staff.

Pamela Manley, our Finance Director/Treasurer was present to discuss this agenda item. She mentioned her concerns on adding a position since it is requested for subsequent years. $110,000 would be for a full year. As for levy limits, we will be stuck on the state limits, we won't have the additional funding from the shared revenue like we had last year. We've built our budget off of having that now. She is mainly just concerned about the subsequent years request on the item. Her recommendation is to do this type of decision during the budget process if you are looking to do it continuously.

City Administrator, Larry Delo added that- if you do approve the position, we should be able to make it work for levy limits for 2025. It may limit or make an impact on other things that you may want to do mid-year.

Human Resources Director, Shannon Metzler mentioned that from a budgetary standpoint, it doesn't work nicely and can be risky on when you would have your next retirement or resignation. Getting someone hired is a long process, which we've been trying to streamline over the years. The background process is lengthy, then have to train them for 16 weeks/4 months, 4 months of a field training process that takes place. We seem to get a position filled, lose another officer, someone goes on FMLA, a retirement, etc. She believes the over-hire is well thought out and if Finance and Council approve the over-hire, we would be fiscally responsible. We would make an educated decision at the time of the hiring process.

Alderperson Kundinger has a question on the budgeting process. The budget process doesn't seem to fit the model of our hiring process. She wants to know if there is a way to set funds aside to allocate to overtime or plan ahead for the hire, so we have more flexibility. She wants to know why we can't have it built into the budget to have greater flexibility.

Administrator Delo commented that how we are structured right now, they are the unassigned reserved. We are very tight on our actual numbers, and the way we accomplish that is by not building in contingencies and budgeting for what you will expect and having an estimate for expenditures and revenues. Then, if something unexpected comes up, then you use the unassigned reserves to fill that gap.

Alderperson Gantz recommends scratching the subsequent wording on the agenda item but to approve the over hire for the Police Department and possibly talk about it at budget time.

Mayor Boyd thinks we should send this to Council. Make a motion to allow the over-hire for the Police Department officer for 2024, but not for subsequent years. Alderperson Gantz seconded the motion.

Adopted as amended.

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|---|---|
| **RESULT:** | **ADOPTED AS AMENDED [UNANIMOUS]** |
| **MOVER:** | James Boyd, Mayor |
| **SECONDER:** | Pamela Gantz, Alderperson |
| **AYES:** | Perock, Gantz, Boyd, Kundinger, Quigley |

8. Consideration and Possible Action on request to purchase station alerting system for Fire Department.*

Chief Matzke highlighted this agenda item. The technology that the Fire Department uses is in the 39th year with the same system. The system is starting to age out, and we are looking to transfer to a much more reliable system. They have been slowly updating things around the Station but are missing the software to run it. The signal (instead of running through air waves), would come through fiber. They reached out to other departments within the county to see if they could all work together on this. We stalled the purchase because we'd like to split the cost between the communities with full-time Fire staff (GB, Ashwabuenon, Howard & De Pere). Green Bay already passed their budget amendment, which secures them in with a certain vendor. It would be best to go with the same vendor because of the equipment that would have to be placed at the Brown Co. Communications Center. All of the infrastructure is already in place at both stations, we just need the software. It would be run through a secure fiber instead of internet line.

Mayor Boyd made the motion to approve the request to purchase station alerting system for the Fire Department and use borrowing as the mechanism instead of unassigned reserves as long as there are no problems with Bond Council.

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|---|---|
| **RESULT:** | **ADOPTED [UNANIMOUS]** |
| **MOVER:** | James Boyd, Mayor |
| **SECONDER:** | Devin Perock, Alderperson |
| **AYES:** | Perock, Gantz, Boyd, Kundinger, Quigley |

9. Consideration and Request to allow over-hire for 1 Firefighter for 2024. *

Chief Matzke was present to talk. Fire's on-boarding time is not as lengthy as the Police Department. The average age of the Firefighters is 42 with 1/3 of the team in their 50's. We are entering that transition period where we will be having more retirements. The stress is during the Summertime, when staff take vacations, etc and we are running at minimum levels of staff. To have someone available by July 1, that would help our operations tremendously for the course of the Summer. The committee can see the breakdown of finances in the packet. $29,000 would be the financial impact from July 1 to the end of the year.

Shannon was remote to talk on the over hire. On boarding process is quite different than the Police Department. She said that this would help them out come summer. We have 2 types of eligible lists of candidates that we can take from for the Fire Department. If we can find someone from our Paid-on Premise pool to hire for full-time, then our on-boarding process goes really quick because they are already employees, they would just have to move up to the 24 hour schedule. The Fox Valley Hiring Process is the other pool that we would be able to hire from.

Alderperson Gantz- asked if this was going to be a permanent position going forward or if it would be only until the end of the year and then we'd have to start the process all over again. Chief Matzke mentioned he would like subsequent years while they have this turnover but understands that maybe it is not as needed. It is mainly needed over the summer season.

Mayor Boyd to request over hire for 1 firefighter for 2024, Gantz seconded. Moving to council.

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|---|---|
| **RESULT:** | **ADOPTED AS AMENDED [UNANIMOUS]** |
| **MOVER:** | James Boyd, Mayor |
| **SECONDER:** | Pamela Gantz, Alderperson |
| **AYES:** | Perock, Gantz, Boyd, Kundinger, Quigley |

10. Consideration and Possible Action on Affiliation Agreement between the City of De Pere and Colorado State University for supervised clinical experiences. *

De Pere Health Department Director, Chrystal Woller was present to speak on this agenda item. Great opportunity for this student who is the Calumet Co. Health Officer going for his Master's Degree. The length of the agreement will depend on his schedule and how long it will take to get his hours in. There is no cost.

| | |
|---|---|
| **RESULT:** | **ADOPTED [UNANIMOUS]** |
| **MOVER:** | James Boyd, Mayor |
| **SECONDER:** | John Quigley, Alderperson |
| **AYES:** | Perock, Gantz, Boyd, Kundinger, Quigley |

11. Consideration and Possible Action for a Proposed Purchase/Sale Agreement terms with AmeriLux Holdings LLC for an Approximately 250,000 Square Foot Trucking and Transportation Terminal Facility Located at 2000 Commerce Drive (Parcel ED-3103, ED-3104, and Portion of ED-3105).*

*Edit- Square footage is not 250,000, it is approximately 500,000.

Development Services Director Dan Lindstrom was present to speak on this agenda item.

We've been working with the representative party on this for quite a while. Large projects like this usually take a little longer to work through Finances. This is also an income generating project itself. This is about a 20-acre site. The site has been maximized. About 495,000 square feet of trucking and transportation terminal facility with 10% manufacturing. They have proposed using high quality materials that will help with the context of the building. When the City created TID 17, it was created to help grow the business park and created to help fund our Southbridge Connector Project, as well as build Commerce Drive. TID 10 has seen its struggles, and TID 17 was created as an

overlay to help make this project happen. We continue to have struggles with our mill rates in the business park. We've struggled with not as much increment coming back because of the mill rates going down. $35 million assessed building. $40 million of anticipated construction costs. Construction years would be 2024-2025. Evaluation date would be January 1, 2026. The first full revenue year would be 2027, with a partial assessment in 2026. $535,000 annual increment revenue created from this project. We are looking at $10 million in revenue for the life of TID 17. They are requesting a $500,000 purchase price. Site assembly grant of $175,000. The site is maximized. We are looking to capitalize the interest before hand. They are willing to push out one of the cash grant requests for a year after their project is open. They are proposing a minimum annual revenue of $600,000 and that puts us at a total $9.6 million in increment. We also look at a market analysis because it is an income generating project. One of the highest value per acre. Amerilux was present at the meeting.

City Administrator Delo mentions how this will be a great addition to the business park and the community.

Alderperson Kundinger had a question about the surrounding infrastructure as more growth happens. The planning that has to go into traffic, streets, planning. How is all of that being planned for? Development Services Director Lindstrom mentions how this project will help preserve the capacity. We've been working with the county on infrastructure and planning.

Larry mentioned utilities with the water authority. NEW water with getting an addition interceptor. It will take time to get everything developed.

| | |
|---|---|
| **RESULT:** | **ADOPTED [UNANIMOUS]** |
| **MOVER:** | James Boyd, Mayor |
| **SECONDER:** | Amy Chandik Kundinger, Alderperson |
| **AYES:** | Perock, Gantz, Boyd, Kundinger, Quigley |

12. Consideration and Possible Action on the City of De Pere Investment and Cash Detail Reports, February 2024.

| | |
|---|---|
| **RESULT:** | **ADOPTED [UNANIMOUS]** |
| **MOVER:** | James Boyd, Mayor |
| **SECONDER:** | Devin Perock, Alderperson |
| **AYES:** | Perock, Gantz, Boyd, Kundinger, Quigley |

13. Future agenda items.

None

14. Adjournment

Mayor Boyd made a motion to adjourn. Alderperson Kundinger seconded the motion. Adjourned at 8:35 pm.

Any person wishing to attend this meeting who, because of disability, requires special accommodations should contact the Clerk's office at 339-4050 by Noon, the previous day so that arrangements can be made.

***Items with an asterisk require City Council approval.**

Agenda Sent To:
Alderpersons
City Administrator
Mayor
Department Heads
TV, Newspapers & Radio Stations
Kress Family Library
De Pere Chamber of Commerce

Respectfully submitted,
Amy Darnick

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **Fire Department** |
| **FROM:** | **Lea Taylor** |
| **SUBJECT:** | **Fire Department Overtime and LifeQuest Billing Reports for April, 2024.** |

**ATTACHMENTS:**

- Fire Dept Overtime Report (PDF)

## *DE PERE FIRE RESCUE*

## *OVERTIME BREAKDOWN BY REASON FOR THE YEAR 2023*

| REASON | Jan.* | Feb.** | Mar. *** | Apr.+ | May++ | June+++ | July^ | Aug.^^ | Sept.^^^ | Oct.# | Nov.## | Dec.### | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| DUTY CREW | 69.00 | 40.50 | 53.00 | 22.50 | 51.00 | 37.75 | 15.00 | 39.00 | 33.00 | 15.00 | 27.00 | 12.00 | 414.75 |
| EMS TRAINING | 74.25 | 247.00 | 115.75 | 99.00 | 28.50 | 42.25 | 58.50 | 111.50 | 143.25 | 135.00 | 68.75 | 157.50 | 1,281.25 |
| FIRE TRAINING | 13.50 | 49.50 | 21.00 | 5.25 | 3.00 | 1.50 | 0.00 | 8.25 | 11.25 | 7.50 | 13.50 | 22.50 | 156.75 |
| RESCUE CALLS | 19.50 | 21.25 | 20.00 | 10.00 | 7.75 | 13.25 | 7.00 | 25.50 | 11.25 | 9.25 | 14.25 | 9.25 | 168.25 |
| FIRE CALLS | 8.75 | 6.25 | 9.50 | 1.75 | 0.00 | 0.00 | 0.75 | 1.75 | 0.00 | 0.00 | 0.00 | 5.50 | 34.25 |
| MEETINGS | 10.75 | 3.00 | 36.75 | 5.75 | 6.00 | 1.50 | 0.00 | 0.00 | 3.00 | 0.00 | 3.50 | 4.50 | 74.75 |
| STAFFING REP. | 39.75 | 509.25 | 220.50 | 234.75 | 216.25 | 375.75 | 447.00 | 716.25 | 124.50 | 56.25 | 411.00 | 294.00 | 3,645.25 |
| MAINTENANCE | 3.00 | 0.00 | 0.75 | 0.00 | 3.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.25 | 9.00 |
| PUB. ED. | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 11.75 | 3.00 | 0.00 | 3.50 | 19.50 | 12.00 | 0.00 | 49.75 |
| SPECIAL EVENTS | 0.00 | 3.00 | 14.25 | 0.00 | 15.00 | 48.75 | 0.00 | 42.75 | 5.25 | 27.00 | 4.50 | 0.00 | 160.50 |
| # FIRE RUNS | 36 | 18 | 24 | 27 | 30 | 36 | 40 | 44 | 28 | 65 | 31 | 21 | 400 |
| # EMS RUNS | 216 | 189 | 226 | 209 | 228 | 209 | 220 | 241 | 225 | 196 | 232 | 277 | 2,668 |
| DISPATCH ERRORS | 5 | 2 | 6 | 3 | 2 | 6 | 3 | 4 | 2 | 8 | 5 | 7 | 53 |
| TOTAL HRS. | 238.50 | 879.75 | 491.50 | 379.00 | 330.50 | 532.50 | 531.25 | 945.00 | 335.00 | 269.50 | 554.50 | 507.50 | 5,994.50 |

**Special Events included in Overtime**

**Total Overtime Budget $115,000, Expenditures through January 2, 2024, $125,055, 109%**

*Period: 12/24/22-01/20/23
**Period: 01/21/23-03/03/23
***Period: 03/04/23-03/31/23
+Period: 04/01/23-04/28/23
++Period: 04/29/23-05/26/23
+++Period: 05/27/23-6/23/23
^Period: 06/24/23-07/21/23
^^Period: 07/22/23-09/01/23
^^^Period: 09/02/23-09/29/23
#Period: 09/30/23-10/27/23
##Period: 10/28/23-11/24/23
###Period: 11/25/23-12/22/23

## *OVERTIME BREAKDOWN BY REASON FOR THE YEAR 2024*

| REASON | Jan.* | Feb.** | Mar. *** | Apr.+ | May++ | June+++ | July^ | Aug.^^ | Sept.^^^ | Oct.# | Nov.## | Dec.### | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| DUTY CREW | 53.50 | 39.00 | 36.00 | 15.00 | | | | | | | | | 143.50 |
| EMS TRAINING | 235.00 | 258.25 | 141.75 | 128.00 | | | | | | | | | 763.00 |
| FIRE TRAINING | 15.00 | 22.75 | 6.00 | 0.00 | | | | | | | | | 43.75 |
| RESCUE CALLS | 27.75 | 15.50 | 12.75 | 1.50 | | | | | | | | | 57.50 |
| FIRE CALLS | 28.50 | 0.00 | 0.00 | 0.75 | | | | | | | | | 29.25 |
| MEETINGS | 3.00 | 33.50 | 9.25 | 19.25 | | | | | | | | | 65.00 |
| STAFFING REP. | 399.00 | 39.00 | 221.00 | 42.00 | | | | | | | | | 701.00 |
| MAINTENANCE | 0.00 | 12.00 | 0.00 | 0.00 | | | | | | | | | 12.00 |
| PUB. ED. | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | | 0.00 |
| SPECIAL EVENTS | 0.00 | 10.50 | 36.75 | 4.50 | | | | | | | | | 51.75 |
| # FIRE RUNS | 31 | 24 | 27 | 64 | | | | | | | | | 146 |
| # EMS RUNS | 223 | 228 | 232 | 222 | | | | | | | | | 905 |
| DISPATCH ERRORS | 7 | 4 | 2 | 4 | | | | | | | | | 17 |
| TOTAL HRS. | 761.75 | 430.50 | 463.50 | 211.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1,866.75 |

**Special Events included in Overtime**

**Total Overtime Budget $115,000, Expenditures through May 1, 2024, $31,508, 27%**

*Period: 12/23/23-02/02/24
**Period: 02/03/24-03/01/24
***Period: 03/02/24-03/29/24
+Period: 03/30/24-04/26/24
++Period:
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^Period:
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#Period:
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###Period:

# DE PERE FIRE RESCUE
# STRUCTURAL FIRE "STILL" ALARMS FOR APRIL, 2024

| Date | Incident Location | Reported Situation | Units Dispatched | Disposition | Mutual Aid Received |
|---|---|---|---|---|---|
| 4/1/2024 | 433 Wilcox Court | Carbon monoxide detector activation, no CO | E111 | Investigate | N/A |
| 4/2/2024 | 3361 Main Street (Town of Ledgeview) | Possible structure fire | BC111, L111 | Dispatched & canceled en route | N/A |
| 4/2/2024 | 486 Main Avenue | Smoke scare, odor of smoke | BC111, E111 | Investigate | N/A |
| 4/3/2024 | Randall Ave/Talbot Ave | Arcing, shorted electrical equipment | E111 | Investigate | N/A |
| 4/3/2024 | 820 Lawton Place | Arcing, shorted electrical equipment | L111 | Investigate | N/A |
| 4/3/2024 | 605 Randall Avenue | Arcing, shorted electrical equipment | L111 | Investigate | N/A |
| 4/3/2024 | Lawton Pl/Randall Ave | Arcing, shorted electrical equipment | BC111, E111 | Investigate | N/A |
| 4/5/2024 | 2870 Ramada Way (Village of Ashwaubenon) | Building fire | BC111, L111 | Provide apparatus, salvage & overhaul | N/A |
| 4/10/2024 | 1716 Lawrence Drive | Alarm system sounded, due to malfunction | BC111, E111 | Investigate | N/A |
| 4/11/2024 | 250 S. Ninth Street | Carbon monoxide incident | E111 | Investigate | N/A |
| 4/11/2024 | 945 LaCroix Ave (Village of Ashwaubenon) | Building fire | BC111, L111 | Extinguishment by fire service personnel, salvage & overhaul | N/A |
| 4/11/2024 | 303 Bay Park Square (Village of Ashwaubenon) | Smoke scare, odor of smoke | BC111, L111 | Investigate | N/A |
| 4/12/2024 | 755 Scheuring Road | Smoke or odor removal | E121 | Investigate | N/A |
| 4/14/2024 | 829 W. Gile Circle | Smoke detector activation, due to malfunction | E111 | Investigate | N/A |
| 4/14/2024 | 990 Aldrin Street | Outside garage fire | BC111, E111, E121 | Extinguishment by fire service personnel | Ashwaubenon, Hobart & Lawrence |
| 4/14/2024 | 2217 Samantha Street | Smoke or odor removal | BC111, E121, A121 | Investigate | N/A |

| Date | Incident Location | Reported Situation | Units Dispatched | Disposition | Mutual Aid Received |
|---|---|---|---|---|---|
| 4/18/2024 | 1700 Chicago Street | Smoke detector activation, due to malfunction | BC111, E111 | Restore fire alarm system | N/A |
| 4/18/2024 | 920 Grant Street | Outside rubbish fire, trash or waste fire | BC111, E121 | Investigate, enforce codes | N/A |
| 4/19/2024 | 801 Lawrence Drive | Steam, vapor, fog or dust thought to be smoke | BC111, A111, E111, E121 | Investigate | N/A |
| 4/19/2024 | 915 Aliskwet Court (Village of Hobart) | Stove fire | BC111, E121 | Dispatched & canceled en route | N/A |
| 4/19/2024 | 2491 Babcock Road (Village of Ashwaubenon) | Structure fire | BC111, L111 | Dispatched & canceled en route | N/A |
| 4/20/2024 | 250 S. Ninth Street | Cooking fire, confined to container | E121 | Restore fire alarm system | N/A |
| 4/23/2024 | 1165 Scheuring Road | Smoke or odor removal | BC111, E121 | Investigate | N/A |
| 4/24/2024 | 1016 N. Broadway Street | Alarm system activation, no fire, unintentional | E111 | Investigate | N/A |
| 4/25/2024 | 201 James Street | Alarm system activation, no fire, unintentional | E111 | Investigate | N/A |
| 4/25/2024 | 200 Cornellius Martin Court | Smoke detector activation, no fire, unintentional | E111 | Investigate, restore fire alarm system | N/A |
| 4/29/2024 | 600 Heritage Road | Commercial compactor fire, confined to container | BC111, E111, E121, L111 | Extinguishment by fire service personnel, ventilate, shut down system | Ashwaubenon, Green Bay & Ledgeview |
| 4/29/2024 | 1700 Chicago Street | Smoke detector activation, due to malfunction | E111 | Investigate | N/A |
| 4/29/2024 | 114 S. Erie Street | Carbon monoxide detector activation, due to malfunction | E111 | Investigate | N/A |
| 4/30/2024 | 1236 Pershing Road | Alarm system activation, no fire, unintentional | BC111 | Investigate, restore fire alarm system | N/A |

**DE PERE FIRE RESCUE**
**OVERTIME CAUSED BY SICK LEAVE**
**APRIL, 2024**

| DATE | HOURS OF SICK LEAVE | OVERTIME PAID |
|---|---|---|
| 4/15/2024 | 14 | 21 |
| | | |
| TOTAL | 14 | 21 |

*Overtime generated when staffing levels fall below minimum as a result of sick leave.

# City Of De Pere

## Income and Expenditures

## April 2024

## All Phases

| Charges | | Billing | Collection | Total |
|---|---|---|---|---|
| Billing Charges / Collection Placements | | $280,578.79 | $38,334.50 | $318,913.29 |
| Other | + | $0.00 | $0.00 | $0.00 |
| **Subtotal of Charges** | | **$280,578.79** | **$38,334.50** | **$318,913.29** |
| **Account Transfers** | | **$14,967.60** | **$19,180.65** | **$34,148.25** |
| **Credit Summary** | | | | |
| **Total Credits** | | **$284,776.61** | **$19,969.34** | **$304,745.95** |
| Less Adjustments | - | $158,314.58 | $(217.75) | $158,096.83 |
| Less Delinquent Closed Accounts Reconciliation | - | $0.00 | $4,497.55 | $4,497.55 |
| Less Overpayments | - | $(2,360.13) | $(1,851.73) | $(4,211.86) |
| **Gross Payments Received** | | **$128,822.16** | **$17,541.27** | **$146,363.43** |
| Plus Overpayment Returns | + | $(994.00) | $(580.00) | $(1,574.00) |
| **Net Payments Received** | | **$127,828.16** | **$16,961.27** | **$144,789.43** |
| Less Payments Kept By Service | - | $0.00 | $0.00 | $0.00 |
| **Total Deposits Reconciliation** | | **$127,828.16** | **$16,961.27** | **$144,789.43** |
| **Summary of Disbursement** | | | | |
| Total Deposits & Payments Kept By | | $127,828.16 | $16,961.27 | $144,789.43 |
| Plus Overpayment Refunds | + | $(1,366.13) | $(1,271.73) | $(2,637.86) |
| **Gross Revenue** | | **$126,462.03** | **$15,689.54** | **$142,151.57** |
| LifeQuest Fee | | $5,690.79 | $3,451.70 | $9,142.49 |
| Plus Probate Fees | + | $0.00 | $0.00 | $0.00 |
| Other / Fees | | - | - | $0.00 |
| **Total Due LifeQuest** **Check #** **EFT** | | **$5,690.79** | **$3,451.70** | **$9,142.49** |
| Service Revenue | | $120,771.24 | $12,237.84 | $133,009.08 |
| Less Payments Kept By Service | - | $0.00 | $0.00 | $0.00 |
| Less Service Payable | - | $0.00 | $0.00 | $0.00 |
| Less Probate Fees | - | $0.00 | $0.00 | $0.00 |
| Other / Fees | | $0.00 | $0.00 | $0.00 |
| **Total Due Service** **Check #** **EFT** | | **$120,771.24** | **$12,237.84** | **$133,009.08** |

**Messages:**

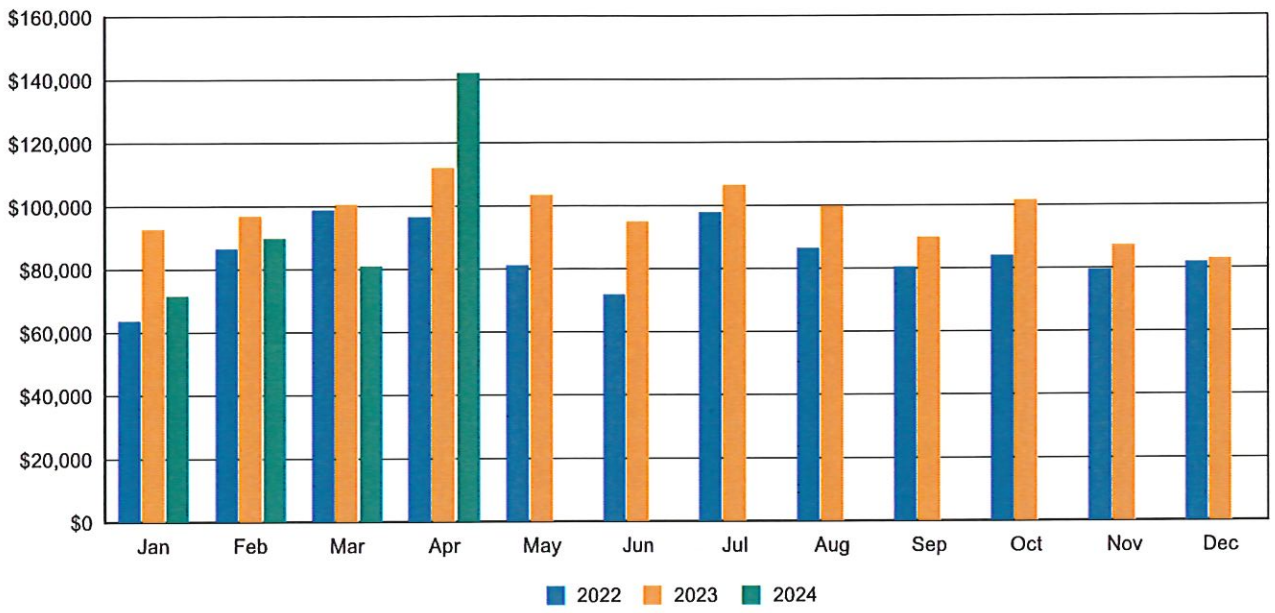
Void ck #1277 $111.34 due to no refund needed incorrect posting jlc 4.15.24

TOTAL DEPOSITS DIFFER FROM BANK STATEMENT BY 18927.22 DUE TO POSTING CORRECTION 111.34 AND NSF 1574 BEING POSTED AND CURRENT MONTH DD NOT BEING POSTED (4/12 DEAN 1376 4/12 DEAN 1458 4/23 UHC 1572.41 4/24 UHC 392.57 4/25 UHC 1499.39 4/29 TRIP 1460.60 4/29 UNITED BEHAVIOR 958.76 4/29 UNITED BEHAVIOR 5844.19 4/30 UHC 401.17 4/30 UNITED BEHAVIOR 407.63 4/30 HUMANA 254.29 4/30 HUMANA 188.19 4/30 UNITED BEHAVIOR 1428.68) JAL 5.1.24

# All Phases Gross Revenue

**City of De Pere**

**January 2022 to April 2024**




| | 2022 | 2023 | 2024 |
|---|---|---|---|
| January | $63,841 | $92,717 | $71,664 |
| February | $86,624 | $96,954 | $89,949 |
| March | $98,825 | $100,571 | $81,022 |
| April | $96,607 | $112,135 | $142,152 |
| May | $81,259 | $103,493 | $0 |
| June | $72,087 | $94,967 | $0 |
| July | $97,965 | $106,510 | $0 |
| August | $86,527 | $99,867 | $0 |
| September | $80,584 | $89,866 | $0 |
| October | $84,134 | $101,640 | $0 |
| November | $79,587 | $87,295 | $0 |
| December | $81,992 | $82,961 | $0 |
| **Total Gross Revenue** | **$1,010,034** | **$1,168,976** | **$384,787** |

# City Of De Pere

## Billing Summary

## April 2024

## Phase 1

| | | | |
|---|---|---|---|
| **Charges** | | | |
| Billing Charges | | $280,578.79 | |
| Other | + | $0.00 | |
| **Subtotal of Charges** | | | **$280,578.79** |
| **Account Transfers** | | | |
| Billing to Collections Transfer Total | | | **$14,967.60** |
| **Credit Summary** | | | |
| **Total Credits** | | $284,776.61 | |
| Less Adjustments | - | $158,314.58 | |
| Less Overpayments | - | $(2,360.13) | |
| **Gross Payments Received** | | | **$128,822.16** |
| Plus Overpayment Returns | - | $(994.00) | |
| **Net Payments Received** | | | **$127,828.16** |
| Less Payments Kept By Service | - | $0.00 | |
| **Total Deposits Reconciliation** | | | **$127,828.16** |
| **Summary of Disbursement** | | | |
| Total Deposits & Payments Kept By | | $127,828.16 | |
| Plus Overpayment Refunds | + | $(1,366.13) | |
| **Gross Revenue** | | | **$126,462.03** |
| LifeQuest Fee | | $5,690.79 | |
| Plus Probate Fees | + | $0.00 | |
| **Total Due LifeQuest** **Check #** **EFT** | | | **$5,690.79** |
| Service Revenue | | $120,771.24 | |
| Less Payment Kept By Service | - | $0.00 | |
| Less Service Payable | - | $0.00 | |
| Less Probate Fees | - | $0.00 | |
| Other / Fees | - | $0.00 | |
| **Total Due Service** **Check #** **EFT** | | | **$120,771.24** |

**Messages:**

**Legend:**

**Charges - Other:** Includes insurance interest, transaction fees, probate fees

**Credit Summary - Less Overpayments:** Includes recoupments, refunds, returns, service payables

**Credit Summary - Plus Overpayment Returns:** Includes NSF/bank returned type payments

# Receivables Distribution Report

## Receivables Cash

**All Companies** **All Directories**

| Charges | May 2023 | Jun 2023 | Jul 2023 | Aug 2023 | Sep 2023 | Oct 2023 | Nov 2023 | Dec 2023 | Jan 2024 | Feb 2024 | Mar 2024 | Apr 2024 | Totals |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| May 2023 | 10264 | 45017 | 25029 | 11385 | 3497 | 1348 | 1622 | 180 | 180 | 30 | -1047 | 30 $ | 97535 |
| 227479 | 4.5 | 19.8 | 11 | 5 | 1.5 | 0.6 | 0.7 | 0.1 | 0.1 | 0 | -0.5 | 0 % | 42.9 |
| Jun 2023 | | 5639 | 46018 | 15607 | 3620 | 5248 | 3994 | 77 | 859 | 55 | 856 | 709 $ | 82683 |
| 202474 | | 2.8 | 22.7 | 7.7 | 1.8 | 2.6 | 2 | 0 | 0.4 | 0 | 0.4 | 0.4 % | 40.8 |
| Jul 2023 | | | 13823 | 57300 | 20376 | 4901 | 3340 | 1821 | 700 | 129 | 275 | -158 $ | 102509 |
| 228843 | | | 6 | 25 | 8.9 | 2.1 | 1.5 | 0.8 | 0.3 | 0.1 | 0.1 | -0.1 % | 44.8 |
| Aug 2023 | | | | 2748 | 49490 | 26849 | 8279 | 1834 | 6072 | 45 | 623 | 488 $ | 96429 |
| 228205 | | | | 1.2 | 21.7 | 11.8 | 3.6 | 0.8 | 2.7 | 0 | 0.3 | 0.2 % | 42.3 |
| Sep 2023 | | | | | 5698 | 48883 | 17017 | 3808 | 7277 | 815 | 204 | 150 $ | 83853 |
| 210778 | | | | | 2.7 | 23.2 | 8.1 | 1.8 | 3.5 | 0.4 | 0.1 | 0.1 % | 39.8 |
| Oct 2023 | | | | | | 5909 | 42716 | 18777 | 11437 | 522 | 3032 | 2517 $ | 84911 |
| 196584 | | | | | | 3 | 21.7 | 9.6 | 5.8 | 0.3 | 1.5 | 1.3 % | 43.2 |
| Nov 2023 | | | | | | | 2773 | 45475 | 13023 | 17820 | 4580 | 7472 $ | 91145 |
| 232856 | | | | | | | 1.2 | 19.5 | 5.6 | 7.7 | 2 | 3.2 % | 39.1 |
| Dec 2023 | | | | | | | | 0 | 16190 | 37899 | 33529 | 11280 $ | 98898 |
| 262566 | | | | | | | | 0 | 6.2 | 14.4 | 12.8 | 4.3 % | 37.7 |
| Jan 2024 | | | | | | | | | 0 | 12840 | 15621 | 29269 $ | 57729 |
| 208164 | | | | | | | | | 0 | 6.2 | 7.5 | 14.1 % | 27.7 |
| Feb 2024 | | | | | | | | | | 0 | 4498 | 44399 $ | 48898 |
| 221193 | | | | | | | | | | 0 | 2 | 20.1 % | 22.1 |
| Mar 2024 | | | | | | | | | | | 0 | 29525 $ | 29525 |
| 217799 | | | | | | | | | | | 0 | 13.6 % | 13.6 |
| Apr 2024 | | | | | | | | | | | | 0 $ | 0 |
| 0 | | | | | | | | | | | | 0 % | 0 |

| Averages | 1st Mo | 2nd Mo | 3rd Mo | 4th Mo | 5th Mo | 6th Mo | 7th Mo | 8th Mo | 9th Mo | 10th Mo | 11th Mo | 12th Mo |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Extended | 1.9 | <NA> | <NA> | <NA> | <NA> | <NA> | <NA> | <NA> | <NA> | <NA> | <NA> | <NA> |
| Weighted | 1.9 | 16.3 | 10.6 | 6.2 | 2.1 | 1.6 | 0.4 | 0.2 | 0.1 | 0.1 | -0.1 | 0 |

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **Police** |
| **FROM:** | **Jeremy Muraski** |
| **SUBJECT:** | **Consideration and Possible Action to allow surplus vehicles and equipment to be auctioned with proceeds going to the selling department's vehicle maintenance account. *** |

Please see the attached memo.

**ATTACHMENTS:**

- Public Safety Vehicle Auctions Signed(PDF)

April 2, 2024

TO: Members of City Council, City Administrator Delo, and Mayor James Boyd

FROM: Fire Chief Al Matzke, Police Chief Jeremy A. Muraski

RE: Surplus Vehicle Sale Request

As fire and police vehicles and equipment reach end of their useful life, they are generally auctioned off. Because they have high miles and begin to become expensive to repair and maintain, it is time to dispose of them as they are no longer cost effective, and more importantly, cannot be relied upon in priority or emergency situations.

We are requesting approval, therefore, to auction these vehicles off using the surplus property auction website, wisconsinsurplus.com. This auction service has been used by the City of De Pere in the past, and is used by municipalities, school districts, and colleges around Wisconsin to auction off their surplus property. It is very common to see fire department, police department, and public works vehicles and other surplus equipment listed from all around the state for sale on their site.

Prior to the sale, any useful equipment, or restricted equipment such as public safety radios or lighting will be removed from the vehicle and not included in the sale. The same would apply to any equipment that is in good repair and able to be used in future vehicles. If this process is approved, sale proceeds would then be placed in the selling department's designated vehicle maintenance account to help offset other vehicle repair, equipment, and maintenance costs for the remaining viable fleet.

Thank you for your time and consideration.

Sincerely,

Al Matzke, Fire Chief

Jeremy A. Muraski, Chief of Police

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **Information Technology** |
| **FROM:** | **Steve Massey** |
| **SUBJECT:** | **Consideration and Possible Action on City Hall Floor 1 Data Center Cooling Redundancy – Approval of Reallocation of ARPA Funding.*** |

**ATTACHMENTS:**

- Memo to Finance - City Hall Floor 1 Data Center Redundant Cooling_SMv1 (PDF)

# CITY OF DE PERE
# MEMO

To: Mayor James Boyd
Members of the Finance/Personnel Committee
From: Steve Massey, IT Director
Date: May 9, 2024

RE: **City Hall Floor 1 Data Center Cooling Redundancy – Approval of Reallocation of ARPA Funding**

Redundant cooling was installed in the City Hall floor 2 data center in March 2024. ARPA funding in the amount of $30,000 was approved for the project. The project ended up costing $12,150.

The City Hall floor 1 data center currently has a wall A/C unit that struggles to maintain adequate cooling year-round. If the wall A/C unit fails it would cause the City IT infrastructure to overheat resulting in IT resources becoming unavailable until adequate cooling becomes available. Adding a redundant A/C unit would provide stable cooling in the datacenter in the event of cooling equipment failure. The cost to add redundant cooling to the floor 1 data center is $12,150. Staff is seeking approval of reallocating unspent ARPA funding from the floor 2 data center cooling project to fund the floor 1 data center cooling project.

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **Human Resources** |
| **FROM:** | **Shannon Metzler** |
| **SUBJECT:** | **Consideration and Possible Action to hire Affion Public recruitment firm to conduct a City Administrator recruitment. *** |

**ATTACHMENTS:**

- Memo to Finance and Council to hire Affion Public Recruitment Firm (PDF)
- City of De Pere WI - general contract_ (PDF)
- City of De Pere, WI - City Administrator - proposal - Affion Public (PDF)
- City of De Pere, WI - City Administrator - proposal - CPS (PDF)
- City of De Pere, WI - City Administrator - proposal - GOVHR (PDF)
- City of De Pere, WI - City Administrator - proposal - PAA (PDF)
- City of De Pere, WI - City Administrator - proposal - S. Renée Narloch & Associates (PDF)
- City of De Pere, WI - City Administrator - proposal - SGR (PDF)

# CITY OF DE PERE
# MEMO

To: Finance/Personnel Committee
From: Shannon Metzler, Human Resource Director/Assistant City Administrator
Date: May 14, 2024

RE: Discussion and Possible Action to hire Affion Public recruitment firm to conduct a City Administrator recruitment

At last month's City Council meeting the Council authorized the City to seek proposals from various recruitment firms to assist in hiring the next City Administrator. We reached out to numerous recruitment firms and received six formal proposals. We interviewed three firms and narrowed it down to an organized called Affion Public. Affion has conducted numerous City Administrator/City Manager recruitments across the county. In talking to their references, I feel they will be a great fit for the City.

The cost to hire a recruitment firm varies slightly with the majority of them charging $25,000-$30,000. Affion's total cost is $28,000. Attached is Affion's contract, which will be subject to the attorney's office suggested changes.

If you have questions in advance of the meeting, please contact me at 339-4045.

# EXECUTIVE SEARCH AGREEMENT

THIS EXECUTIVE SEARCH AGREEMENT ("Agreement") made effective as of this 18th day of April 2024, by and between Affion Public, LLC (hereinafter "FIRM"), with offices at PO. Box 794 Hershey, PA 17033 and the City of De Pere, WI (hereinafter "Client") with offices at 335 S. Broadway, De Pere WI 54115.

## WITNESSETH:

WHEREAS, FIRM is in the business of locating executive personnel candidates for clients according to the client's specifications; and

WHEREAS, Client from time to time desires the services of one or more of such candidates; and

WHEREAS, FIRM and Client wish to enter into an exclusive agreement pursuant to which FIRM will qualify and arrange such candidates for Client;

NOW, THEREFORE, in consideration of the promises and of the mutual covenants set forth herein, FIRM and Client, intending to be legally bound, agree as follows:

1. Services Provided Under Agreement. For any candidate who will be placed with Client, FIRM has or will issue a proposal to Client which defines the search and evaluation strategy. In the event of a conflict between the terms of this Agreement and the terms of the proposal, the terms of this Agreement shall control unless the proposal specifically identifies the conflicting terms of this Agreement and explicitly states that such terms shall not apply.

2. Billing and Payment. FIRM will bill Client through invoices issued to Client beginning upon the execution of this Agreement. FIRM's fee shall be $28,000.00 for any candidate placed by FIRM with Client. FIRM will invoice Client in three installments: a non-refundable one-third upon signing this Agreement; one-third upon acceptance of the candidate and the final third upon filling the position. FIRM's invoices are payable by Client upon receipt. In the event that the candidate does not meet the Client's reasonable expectations within the first two years (24) months of hire, FIRM will use its best efforts to provide a replacement. In the event Client hires its own candidate during the term of this Agreement, FIRM shall still be entitled to its full fee. Further, if Client, within one (1) year of the date of hire for any position covered by this Agreement, should hire a candidate presented by FIRM, FIRM shall be entitled to a fee equal to the contract fee, which shall be due and payable to FIRM upon hiring. Client is obligated to notify FIRM of any candidate presented to Client who is hired by Client within five (5) business days of such hire.

3. Confidentiality. Each Party agrees that it will not disclose to any third party any information learned by it which has been clearly marked "Confidential" by the other party, except as such disclosure is necessary on an individual basis to candidates whom FIRM has located for Client. Client may request the candidate to execute a separate agreement not to disclose the Client's confidential information.

4. Excise, Sales, Etc. Taxes on Services. There shall be added to any charges payable by Client under this Agreement amounts equal to any and all applicable taxes, however designated, levied or based on any charges payable under this Agreement or the services rendered hereunder, including without limitation state and local privilege, excise, sales, and use taxes and any taxes or amounts in lieu thereof paid or payable by FIRM, but excluding taxes based upon the net income of FIRM. Client shall be billed by FIRM before or within a reasonable time following payment of such taxes by FIRM, and such amounts shall be due and payable by Client promptly following billing.

5. Exclusivity. Client agrees that, upon execution of this Agreement, it will not advertise nor use a competing organization for executive search services during the term of this Agreement.

6. Expenses. Additional expenses, which are not included in the overall fee but are expected to be reimbursed by the Client, include all candidate travel for the purpose of the interviews. This will vary depending on the location of the finalist.

7. Liability and Indemnification. FIRM shall indemnify, defend and hold harmless Client, its directors, officers and employees from any and all claims, liabilities, causes of actions, losses and expenses (collectively, "Claims") arising out of the gross negligence or willful misconduct of FIRM, its directors, officers, employees, agents and representatives (collectively, the "FIRM Parties"). Notwithstanding the foregoing, the FIRM shall not be liable for any Claims arising out of or related to any act or omission of a candidate, that was beyond its control. FIRM shall not be liable for any special or consequential damages or lost profits, and in no event shall FIRM's liability under this Section 7 be greater than the total amount paid to FIRM by Client pursuant to this Agreement.

8. Termination of this Agreement. This Agreement shall continue in effect until terminated by Client or FIRM at any time upon the terminating party giving no less than thirty (30) days notice to the non-terminating party. In the event Client terminates the Agreement prior to the acceptance of a candidate, FIRM shall still be entitled to its second one-third payment.

9. Assignment. Neither this Agreement nor any interest hereunder may be assigned or otherwise transferred by either party to third parties other than affiliates of either party without the prior written consent of the other party which shall not be unreasonably withheld. This Agreement shall be binding upon and inure to the benefit of the heirs, successors, assigns, and delegates of the parties hereto.

10. Notices. Any requirement to “notify”, or for “notice” or “notification”, in connection with the subject matter of this Agreement shall be in writing and shall be effective when delivered personally (including by Federal Express, Express Mail, or similar courier service) to the party for whom intended, or five (5) days following deposit of the same into the United States mail, certified mail, return receipt requested, first class postage pre-paid, addressed to such party at the address set forth below its signature to this Agreement. Either party may designate a different address by notice to the other given in accordance with this Section.

11. Severability. If any term or provision of this Agreement shall be found to be illegal or otherwise unenforceable, the same shall not invalidate the whole of this Agreement, but such term or provision shall be deemed modified to the extent necessary by the adjudication to render such term or provision enforceable, and the rights and obligations of the parties shall be construed and enforced accordingly, preserving to the fullest permissible extent the intent and agreements of the parties herein set forth.

12. Complete Agreement and Amendment. This Agreement and the proposal presented to Client by FIRM contain the entire agreement between the parties hereto with respect to the matters covered herein. Client acknowledges that it is entering into this Agreement solely on the basis of the agreements and representations contained herein. This Agreement shall not be modified in any way except in writing signed by both parties and stating expressly that it constitutes a modification of this Agreement.

13. Governing Law and Disputes. This Agreement shall be governed by the laws of the Commonwealth of Pennsylvania. All claims against either party to this Agreement shall be brought by the other party no later than one (1) year after such claims have arisen (except for claims for non-payment for services, which may be brought within two (2) years after the last date of services for which payment is sought). Any lawsuits pertaining to this Agreement or the services provided hereunder shall be brought in the Federal and State courts of the Commonwealth of Pennsylvania.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement on this day and year first above written.

| **FIRM:** | **CLIENT:** |
|---|---|
| **Affion Public, LLC** | **City of De Pere, WI** |
| By: | By: |
| Title: | Title: |

*We deliver leaders. Our executive recruiting specialists have national contacts within the public sector and professional organizations – allowing us to find a broad range of talent. We rigorously qualify and investigate each candidate. We won't just pull names out of a database. When we are finished, you will have candidates that meet or exceed your expectations.*

affion PUBLIC

*Delivering Leaders*



Affion Public, LLC @Affionpublic affionpublic

affion PUBLIC

**Corporate Address:**
PO Box 794
Hershey, PA 17033

www.affionpublic.com
888.321.4922 toll free
717.214.4922 local

04/23/2024

Shannon Metzler
Human Resources Director
335 South Broadway
De Pere WI 54115

Dear Shannon,

Thank you for the opportunity to submit our offer of executive search and recruiting services for the City Administrator position.

Affion Public is an executive search firm specializing in identifying and placing exceptional executive-level candidates within the public sector. With a successful track record in placing public sector executives, we pride ourselves on developing strong working relationships with our clients.

Our partnership approach and high-quality work ensure that our clients receive the level of attention and service they deserve. Our search process and collaborative approach have enabled Affion Public to conduct multiple successful searches for the majority of our clients.

What sets us apart is our commitment to finding the best candidates, both passive and active, who will meet the specific needs of our clients. This approach allows us to provide a tailored pool of candidates, rather than recycling the same ones search after search. Additionally, our dedication to diversity and success in targeting minority candidates further distinguishes us from other firms.

On behalf of Affion Public, we would be thrilled to be your firm of choice. Please feel free to contact me directly at 717-576-9847 or via email at reilly@affionpublic.com. I look forward to speaking with you soon.

Best Regards,

Scott Reilly
CEO, Affion Public

*Delivering Leaders.*

# City of De Pere, WI
# City Administrator
# Executive Search Services
# 04/23/2024

**Corporate Mailing Address:**

**P.O. Box 794**
**Hershey, PA 17033**
**888-321-4922**
**www.affionpublic.com**

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**Affion Disclaimer**
*Copyright © 2009 by Affion Public, LLC. All rights reserved. Printed in the United States of America. The information in this document is the exclusive property of Affion Public, LLC. The data and trade secrets contained herein are submitted for use solely by the City of De Pere. The reproduction of this document or any portion thereof, in any form, without the express written consent of Affion Public, LLC is forbidden.*

## Company Profile

Affion Public is deeply rooted in the public sector, providing executive search services for state and local government, education and non-profit organizations since 2000.

Our executive search division specializes in identifying the nation's best and brightest executives and delivering those individuals to our public sector clients. Our partners are typically state, county, city, and government organizations as well as non-profits. Recognized as a leader in public sector executive searches, Affion has attained "preferred" vendor status or an exclusive relationship with a majority of its client partners.

Affion's corporate address is P.O. Box 794, Hershey, PA 17033.

## Why Affion?

We are different. As a company, our strengths lie in our people, our passion, and our commitment. Affion employs an extremely talented group of professionals that bring a diverse set of skills and an average of over 10 years of experience in government and private sector venues. Extraordinary, trusted client partnerships have separated us from others in the industry. Embracing a small business approach has enabled the entrepreneurial spirit of Affion, while also ensuring a personalized approach and customized solution for our partners.

It is our unique understanding of the complexities of the public sector that gives us an edge. We know what to challenge potential candidates on, and we know how to discern and qualify the very specific set of skills an executive needs in order to succeed within the public realm. Our particular expertise lies in our ability to reach out to and ultimately attract the best and the brightest into the public executive domain. Short and long term, Affion is looking for valued, long-lasting partnerships, where we can have a real and positive effect for our client.

Our public sector team provides a full range of customized executive recruiting and management consulting services. Particular areas of expertise lie within strategy, human resources, process and solutions. We have served in an advisory capacity to state, city, and municipal governments across the country.

Historically, our specialized executive recruitment services have been client driven. By building strong client partnerships, and practicing due diligence, we gain an invaluable understanding of the mission, motivation and culture of our client. This has allowed us to successfully recruit across all departmental disciplines and ultimately to provide top executives to an array of governmental agencies and authorities (e.g. Information Systems, Public Safety, Engineering, Health and Human Services, Water Utilities, Economic Development, Assistant City Managers, City Managers, etc.).

## What We Do Differently

Our executive search goal is to specify, identify, qualify and deliver candidates that meet or exceed your expectations. After consulting with client executives and stakeholders, we utilize a systematic search methodology to customize and tailor the ideal candidate and position profile to meet the specified need.

Targeting organizations that are similar to our client, we set out to find individuals that meet and exceed the background, education, experience, and personal characteristics required. This is done in a highly confidential manner and in compliance with applicable legal standards. Once a potential candidate has been identified, they will enter into a rigorous qualifying process to further establish the "fit". A comprehensive confidential report on each of the selected candidates is prepared to include pertinent information relative to the candidates work history and background. A professional appraisal of the candidates' competencies compared to the specific requirements will be provided as a continuum to the report. In the form of a portfolio presentation, we meet with the stakeholders to make our recommendations. We deliver individuals that are competent, qualified, and capable. We deliver solutions.

## Relevant Search Experience

**City of Austin, TX**
- City Manager (2008)

**City of Broken Arrow, OK**
- City Manager (2012; 2015)

**City of Celina, TX**
- City Manager (2023)

**City of College Station, TX**
- City Manager (2018)

**City of Columbia, MO**
- City Manager (2011)

**City of Commerce City, CO**
- City Manager (2021)

**City of Dallas, TX**
- City Manager (2016)

**City of Dublin, OH**
- City Manager (2022)

**City of East Lansing, MI**
- City Manager (2012)

**City of El Paso, TX**
- City Manager (2014)

**City of Frisco, TX**
- City Manager (2022)

**City of Galveston, TX**
- City Manager (2012)

**City of Huntsville, TX**
- City Manager (2008)

**City of Hollywood, FL**
- City Manager (2012)

**City of Irving, TX**
- City Manager (2006)

**City of Kirkwood, MO**
- Chief Administrative Officer (2014)

**City of Kyle, TX**
- City Manager (2023)

**City of Leander, TX**
- City Manager (2011)

**City of Marshall, TX**
- City Manager (2014)

**City of McKinney, TX**
- City Manager (2008)

**City of Morgantown, WV**
- City Manager (2010)

**City of North Richland Hills, TX**
- City Manager (2009)

**City of Plano, TX**
- City Manager (2011)

**City of Round Rock, TX**
- City Manager (2011)

**City of San Antonio, TX**
- City Manager (2006)

**City of San Marcos, TX**
- City Manager (2008)

**City of Shawnee, OK**
- City Manager (2015)

**City of Springfield, MO**
- City Manager (2008)

**City of Taylor, TX**
- City Manager (2019)

**City of Thornton, CO**
- City Manager (2015)

**City of West Valley City, UT**
- City Manager (2023)

**Delaware County, PA**
- Executive Director (2020)

**Town of Mooresville, NC**
- Town Manager (2023)

## Objectives and Approach

1. **Establishing the Timeline** – we will work closely with you to determine your ideal start date for your executive and then work to make sure that we agree on all target dates and activities.

2. **Input from Key Decision Makers** – we will meet with all parties who will be impacted by this executive to seek input, which will also help us understand the company, the people and the working environment. This can include setting up public forums to engage the community in assisting in the process.

3. **Developing the Candidate Profile** – through extensive interviews we will gain a complete understanding of the mission and goals of the company and begin to create the profile of the executive you are seeking.

4. **Candidate Pool and Search Techniques** – we will use our own extensive internal database, our personal and professional connections, competitor intelligence, targeted recruiting, industry specific sourcing and other recruiting tools to begin to identify the perfect candidate.

5. **Screening Process** – we will conduct interviews to qualify each candidate, whether it is an internal candidate or an external one, prior to presentation to you, and will conduct an extensive background check on each potential candidate.

6. **Selecting Candidates for Client Review** – we will present the key decision makers with a portfolio of candidates for consideration and will discuss each candidate's skills and qualifications in detail.

7. **Choosing the Finalists and the Interview** – once the client has reviewed the candidates and has selected the finalists, interviews with the key decision makers or the selection committee will begin.

8. **Hiring** – all candidates will have been pre-qualified on the salary range; benefits and we will assist in all final employment matters.

## Developing the Candidate Profile

At Affion, our approach to executive searches is both personal and systematic. Our success hinges on the access and information provided by our client organizations, enabling us to gather comprehensive insights and develop a deep understanding of their needs. Only by intimately knowing the organization and meticulously defining the ideal candidate profile can we ensure the right match for both the organization and the selected individual.

We take pride in the value we bring to the table by collaborating with clients to develop the ideal candidate profile. This involves extensive engagement with key decision-makers, elected officials, and others at the outset. We delve into the position's history, the organization's mission and goals, past successes and failures, staff dynamics, budget considerations, and other crucial aspects that the selected candidate must address. Understanding where the organization aims to go and the requirements for getting there is essential for finding the ideal leader.

Every search is unique, and we invest significant time in understanding the client's style and organizational culture, as well as each candidate under consideration. We establish strong relationships with decision-makers and potential colleagues of the candidates to ensure a compatible match. Spending time with decision-makers helps us grasp their vision of the "ideal" candidate, their management style, and the significance of the position to them and the organization. We embrace the organization's vision to recruit candidates who align with its goals and can lead strategies that support that vision.

We conduct interviews with successful executives at the peer level of the vacant position to understand the qualities of successful leaders within the organization. Additionally, we find it valuable to interview subordinate-level staff, if possible, to assess current resource challenges or strengths that the incoming executive would encounter.

These initial stages are crucial in our view. Our entire search team, including our assigned recruiters, is involved in this information-gathering and relationship-building process from the beginning. This ensures that we all understand exactly what our client is seeking in applicants and can qualify candidates based on the client's organizational culture.

Based on the interviews and data gathered, we prepare a comprehensive candidate recruitment profile for the position, outlining the desired qualifications and characteristics. This profile is then presented for approval by the client's designated representatives. It is from this customized profile that we conduct our systematic search.

## Input from Stakeholders

The first steps in any search begin with our onsite stakeholder meetings.  The purpose of the stakeholder interviews is to allow Affion an intimate understanding of the organization, the people and the environment.  These interviews are how we develop the two key profiles in which the search is built around.  The first profile is the position profile.  The position profile includes not only the requirements the successful individual will possess but also what they will be doing on a daily, weekly and monthly basis.  This profile is critical in analyzing the potential candidate’s previous experience. The second profile is the candidate profile in which we spoke previously about.  This profile allows Affion to define the type of individuals that will be successful in your organization.

The stakeholder meetings begin with developing the list of individuals that will be working directly with this person.  This list should include whomever the individual is responsible for reporting to and anyone who may be directly involved with the hiring and interview process.  Affion is committed to spending as much time as necessary on the stakeholder meeting to ensure a successful placement.

The stakeholder meetings are approximately one-hour interview session in which our team will ask probing questions to what will make the candidate successful.  These are generally done on an individual basis.

Additional stakeholder meetings including public input will be scheduled at the discretion of the selection team.  We have a long history of being very inclusive with our stakeholder process and often meet with community leaders, business leaders, civic and religious leaders as well as neighborhood associations.

## Candidate Pool

Affion is a relationship driven, select targeting firm. We use our own internal database to draw upon potential candidates with whom we have built relationships and/or referrals. We use the telephone to reach out to referrals and candidates initially. We use the Internet as well as select research firms to investigate credit, criminal and other background checks and to obtain any written publications authored by, or regarding, the candidates. Beyond this limited use of technology, our efforts are all carried out in person. We post the job on the Internet or advertise in print as required by the client organization. Even our utilization of networks of professional or trade associations is done in person. This personal approach is how we have been most successful in targeting and attracting the best and most diverse selection of candidates.

Each Affion recruitment effort is customized specifically to the client organization's needs and preferences. One of the additional values achieved from the time we spend in the beginning is getting to know the client organization and its culture and obtaining mutual agreement on a process that works for both of us. While we have a very strict and systematic internal qualifying/screening process, it is only visible to the client in the result it produces. Any processes external to our qualifying/screening process may be modified to accommodate the client's organizational needs.

## Affion Process in Screening

While the general steps outlined herein are the basis of the Affion search, flexibility is built into our model to accommodate a particular client's preferences. Our search is customized to best meet the needs of our client and as long as we are not asked to forego steps to ensure quality, modifications or additions can be made.

### *Sourcing/Recruiting Candidates*

Our senior executive recruiters (100% dedicated to this search) will identify candidates who have been successful in like organizations in similar positions. We search from a variety of sources to ensure development of a broad representative pool in terms of affirmative action efforts and experience; including our own network of contacts and files; public or private entities, professional and other associations and organizations related to the position and referrals. We do targeted advertising in publications specific to the position.

### *Targeted Recruiting*

Affion maintains a national database through extensive networks in industry specific business groups, trade and professional organizations. To further ensure a diverse candidate pool, we also source candidates from professional organizations and networks that are ethnic and gender specific. We reach out to a variety of sources to collectively find the best talent available.

As a result of our previous and ongoing recruiting efforts within government and quasi-government organizations, (local, city, county, and state) Affion has, and continues to build, an expansive network of candidates that includes the best and the brightest in the public sector. That network of candidates exemplifies our professional commitment to building valued relationships, knowing the individuals' experience and leadership styles, and understanding their needs and career goals. By operating within these guidelines, our deliverable to our client results in being a known and trusted entity.

### *Screening/Qualifying Candidates*

Our senior executive recruiter conducts preliminary screening interviews of all candidates and the most promising candidates to determine their qualifications, pertinent accomplishments, experience, ability to meet special needs of the position and their interest in being considered. Preliminary screening will be based on a resume rating developed from criteria contained in the customized Candidate Recruitment Profile, information contained in the resumes submitted to Affion, and Affion's knowledge of the people and organizations with whom and in which we work. At this point in the search, our recruiter is also securing preliminary, confidential reference information on the most promising candidates (as available and appropriate) to verify experience and qualifications; i.e., to ensure that it is worthwhile proceeding with them.

After qualifying the best candidates into our process, those individuals are subjected to further rounds of interviews by additional Affion executive staff. The same criteria are used, but the emphasis here, is on organizational and cultural fit, and political acumen. This process assures the quality we demand of the short list of semi-finalists that are selected.

All candidates are met face-to-face when possible. If the face-to-face interviews cannot be arranged, then video conferencing is arranged to ensure that the recruiters and executives within Affion are comfortable with the candidates they are presenting for consideration.

### *Background Investigation*

When all members of the Affion qualifying team have agreed that the candidate fits the desired profile we begin extensive background checks to include criminal, education, and financial investigations. Reference calls are completed. Internet and media searches are conducted. This entire procedure is intended to further eliminate unqualified candidates, and to validate the credentials of the final candidates in process.

### *Selecting Finalists for Promotion to Client*

From our rigorous qualifying process and investigation, Affion typically narrows the field of qualified candidates to the top 6-8. We present all of the client's designated representatives with a comprehensive book of material on each of the selected individuals. These books contain summary profiles, resumes, applications, articles by or regarding the candidate, pertinent work product, and photographs of those candidates whose qualifications, work experience, achievements, and/or other special qualities qualify them for the position. This comprehensive confidential report on each candidate covers not only the candidate's working career and those personal aspects that are relevant to the position, but also our appraisal of how the candidate's competencies compare to your specific needs and environment. Affion and the client's representatives will meet to review the detailed contents of the book.

## Internal Candidates

Affion always screens and evaluates those applications and resumes received by the client from in-house or outside applicants to insure, on the client's behalf, that the process is considered fair to all applicants and to determine if any of these individuals are qualified, viable candidates. Often, at the client's preference we keep all in-house applicants in process until the final qualifying phases of the search process, unless it is clearly established that certain individuals are not qualified.

We review, evaluate and acknowledge in writing all applications and resumes received. Additionally, we ask that all solicitations for consideration made directly to the client be forwarded to Affion immediately to avoid duplication of efforts and take work off the client's shoulders.

## Client Selection of Candidates for Interview

Affion would work closely with the hiring team for selecting the finalist. Affion will make a portfolio presentation to the key stakeholders which will include; the resume, a brief bio written by the candidate, and an answer to the questions "Why Should I be the Next…" Upon our face-to-face presentation of the finalists, with our recommendations and comprehensive background information, we require that the client select the number and names of the candidates it wishes to interview in person.

Upon the client's direction, Affion personnel will coordinate with client personnel to arrange interviews with the top candidates selected for consideration. Affion will work with the client to coordinate any travel or accommodation details that may be needed for each outside candidate.

## Client Interviews and Final Selection

The finalist interviews would be conducted in conjunction with the wishes of the hiring team. Affion typically suggests that the hiring team utilize panel interviews and also perhaps a candidate presentation. The candidate presentation would be an oral presentation accompanied by a visual presentation. The purpose of this presentation is to allow the selection committee to see how the candidates communicate their thought process and the candidate's ability to effectively express those thoughts to their audience.

The formal interview would involve the same set questions asked to each candidate by the same panel member. This allows the selection committee to evaluate each candidate on a fair and equal field. These questions are agreed upon in advance with Affion and the selection committee. Affion will be involved throughout the entire interview process to facilitate the interviews.

## Hiring

Once it is time for a hiring decision, Affion will provide assistance on final employment matters, such as the negotiation process with successful candidates and notification to unsuccessful candidates.

Any candidate that is presented for consideration will have been pre-qualified on the salary range, benefits and relocation package. Once the finalist has been selected it is our standard practice that the client sends a formal offer letter to Affion on behalf of the successful candidate. Affion will facilitate the signature and closing of the process.

## Statement of Diversity

Diversity is deeply ingrained in our core values and heritage at Affion. We recognize and celebrate the richness and value created by the differences among our employees, customers, service offerings, and businesses. It encompasses a wide array of aspects, including people, backgrounds, lifestyles, ideas, and the balance between our work and personal lives. Our commitment to diversity is about maximizing the contributions from all members of our team to deliver greater value to our customers. It is about valuing differences and promoting inclusion, not merely a code word for affirmative action.

At Affion, diversity relies on standards of performance and behavior that foster mutual respect. It is about effectively utilizing our collective talent to create a competitive advantage that leads to success, both for our internal support staff and contract workforce. We are truly dedicated to effectively recruiting and maintaining a diverse workforce.

To ensure equal employment opportunity for all, Affion maintains an Affirmative Action Program and policy that prohibits discrimination based on race, color, religion, sex, national origin, sexual orientation, handicap or disability, or status as a disabled veteran or a veteran of the Vietnam War era. We take affirmative action to ensure that applicants for employment and employees are treated without regard to these characteristics. Our decisions regarding employment status are solely based on an individual's qualifications, and are guided by valid, non-biased job requirements in positions being filled.

Our commitment to diversity extends to all aspects of employment, including recruitment, hiring, promotions, transfers, compensation, benefits, layoffs, terminations, educational tuition assistance, and company-sponsored training and recreational programs. Affion employs responsible reporting and monitoring procedures to ensure strict compliance with the Equal Opportunity Policy and our Affirmative Action program. We are further committed to being an Equal Opportunity Employer in accordance with federal, state, and city laws on fair employment practices. All of our advertising reflects these important standards.

We take pride in our success in ensuring a diverse candidate pool and are thrilled to have placed multiple women and minority candidates in executive-level municipal positions nationwide.

## Sustainability Efforts

Our commitment to climate action includes improving the environmental footprint of our operations by going paperless. All the steps involved in creating paper have significant impacts on the environment. Because of this we have made the commitment to go paperless by providing pdfs of our candidate binder presentations, proposals, and additional written communication.

We have also taken steps to reduce our carbon footprint by implementing less travel and utilizing technology for stakeholder meetings, initial interviews, etc. We hope by taking these actions, we are helping to protect the health of our planet today and for generations to come.

## Individuals Assigned to Search

**Scott Reilly**
***CEO, Affion Public***
***reilly@affionpublic.com***
***717-576-9847***

Scott will be the lead on this search and responsible for quality assurance during the length of your project. During the engagement, he will be responsible for ensuring the success of the process.

Scott, previously the Vice President of Arcus Public, has more than 20 years' experience in Sales, Executive Recruiting and Technology. His depth of knowledge and experience placing top executives and technology professionals enables him to lead the talented group of professionals at Affion Public. Throughout his tenure in the public sector, he has been responsible for leading the engagement process and successfully placing more than 100 professionals in key roles. He's worked in the trenches performing the searches, as well as in leadership roles guiding his team and building relationships with clients while at the helm. He truly understands and appreciates the intricacies of the market, and as CEO for Affion Public, he is responsible for the strategic direction and approach of each of the firm's key service areas.

Scott has been a speaker/presenter on various topics nationally working with leading government officials; to help identify opportunities for technology research and share best practices as well as executive search forums. He was named a founding Honorary Alumni to the Harrisburg University of Science and Technology first graduating class. He currently serves as the vice-chairman of the Derry Township Municipal Authority and has been an active member on the Hershey Country Club Board of Governors. Scott was also recognized by the Central Penn Business Journal as one of the region's Top 40 Under 40. He holds a Bachelor of Science degree in Marketing from Rider University.

Scott has been directly involved with all executive level searches through Arcus Public and Affion Public since 2003.

**Gina Sprowls**
***Director of Recruiting***
***sprowls@affionpublic.com***
***717-763-1987***

Gina will manage the recruitment efforts for your executive search, providing direction and coordination to ensure the ideal candidate profile is met and the best candidate is selected for the job.

She will be responsible for identifying, profiling, and screening candidates, as well as qualifying potential candidates and conducting interviews. Additionally, Gina will assist in coordinating interviews, gathering feedback, and conducting professional reference checks. She may also be involved in presenting the final candidates to stakeholders for consideration.

With over ten years of diverse experience in recruitment, sales, and management, Gina brings a strong background in Human Resources with a focus on executive level recruitment and training. Her experience spans across various industries, including Public Sector, Technology, Finance, Healthcare, Sales, and Education. Gina has successfully managed multiple executive level searches nationwide and is known for building and maintaining excellent relationships with clients and candidates alike. She holds a Bachelor of Science degree in Business Administration from Capella University and an Associate of Arts degree in Human Resources.

Gina has been directly involved in all executive level searches conducted by Arcus Public and Affion Public since January 2008.

## Individuals Assigned to Search continued..

**Brittany Schwaber, Executive Recruiter**

Brittany will focus on the recruiting efforts of your search. As she works through this process, she will adhere to providing a detailed and informative profile of ideal candidates to ensure that the best individual for the position is identified and hired.

Brittany will be responsible for screening candidates that present as qualified contenders for the role. In addition, she will be conducting candidate interviews, coordinating the logistics of interviews, gathering feedback and performing reference checks.

Brittany brings over seven years of experience in recruiting with a dynamic approach to her work. Her career has been diverse in different industries that include biopharmaceuticals, construction, and manufacturing. She has a well-rounded background in the field of Human Resources with an emphasis and passion for talent management strategies, employee retention and engagement initiatives and career development. Brittany is known for her ability and ease in establishing and building relationships with candidates. Her keen eye for detail coupled with her responsiveness makes for a great partnership between clients and candidates. She holds a Bachelor of Science degree in Business Management from Kutztown University and a Professional in Human Resources (PHR) certificate from HRCI.

**Cassandra Segedy, Marketing Associate**

Cassie will focus on the marketing efforts of your search. As she works through this process, she will provide thorough and concise social media marketing and marketing materials, to help reach a large array of qualified candidates.

Cassie will be responsible for creating the brochure used for social media and job postings, posting the position on all Affion Public social media platforms, creating candidate binder presentation materials, and creating job announcements for the successful candidate.

Cassie brings 7 years of marketing, advertising, and graphic design experience with her. Her career has been diverse in different industries that include manufacturing, life sciences, food service, data logging, grocery distribution, and small business management. Cassie has extensive experience in social media marketing, print advertisement, web design, and graphic design. Cassie is known for her easy-going nature, attention to detail, and responsiveness, allowing her to create the perfect marketing materials specific to your city and job posting. Cassie holds a Bachelor of Arts with a concentration in Graphic Design from the State University of New York at Oswego.

**Shanice Caesar, Sourcing Specialist**

Shanice will focus on the sourcing efforts for this search. As she works through this process, she will be responsible for finding candidates that match the experience and ideal candidate specs for this role, posting the position on sponsored job sites, and running background checks.

Shanice brings over five years of experience in recruiting with a dynamic approach to her work. Her career has been diverse in different industries that include Information Technology, Finance, Professional Services and Healthcare. She has a well-rounded background in the field of Information Technology with an emphasis and passion for talent management strategies, employee retention and engagement initiatives and career development. Shanice is known for her ability and ease in establishing and building relationships with candidates. Her keen eye for detail coupled with her responsiveness makes for a great partnership between clients and candidates. She holds a Bachelor of Science degree in Business Management from The University of Guyana.

## Proposed Project Timeline:

| Timeframe | Activity |
|---|---|
| Upon Selection | • Affion to negotiate and finalize contract |
| Once contract is finalized | • Facilitate a meeting to discuss timelines, recruitment process and plan for completing the Position and Candidate Profiles<br>• Affion to meet with identified stakeholders to begin the due diligence process<br>• Conduct Public Forums if needed<br>• Simultaneous industry research taking place |
| Within 10 days after the contract is finalized | • Affion presents draft of Profile |
| Upon approval of profile/brochure | • Search Firm conducts recruitment to include:<br>  ○ Referrals, LinkedIn, Sourcing, etc.<br>  ○ Post the job on websites |
| Ongoing | • Progress Report—check for quality and diversity of applicants. Determine need to target any specific group or area.<br>• Review and qualify all potential candidates |
| 30 days after posting | • Deadline to receive resumes |
| 45 days after resume deadline | • Binder Presentation of 6-8 candidates to the Selection Panel<br>• Affion will facilitate a review of the final candidates |
| 2 weeks after binder presentation | • Conduct first round of candidate interviews with the Search Committee and key stakeholders<br>• Finalize decision on the candidate of choice and negotiate employment agreement with the candidate |
| 2 weeks after final interviews | • Successful Candidate accepts offer of employment |

## Cost

### Full Executive Search:

Affion executive searches are full-service searches conducted by senior executives within our firm. The fee we have outlined herein is all inclusive of all phases of the search including stakeholder meetings, profile development, job postings, sourcing, recruitment, interviewing, reference checking, background checks, media checks, and candidate offer negotiation.

**Fee for the City Administrator position: $28,000 (all inclusive)**

Additional expenses, which are not included in the overall fee but are expected to be reimbursed by the City of De Pere include all candidate travel expenses for the purpose of interviews with the City of De Pere. This will vary depending on the location of the finalist selected.

While invoice procedures can be adjusted, our typical billing practice is to spread the fee payment over three equal installments. (One-third to be billed when the contract is signed, one-third to be billed upon presentation of the Final Candidates, and the last one-third to be billed upon the hiring of the desired Candidate.) Adjustments to our payment and billing processes are negotiable in order to best accommodate our clients' needs.

### Guarantee:

As with all of our executive searches, we are prepared to offer our standard professional service guarantee. If the hired candidate is asked to leave for reasons of non-performance or leaves of his/her own volition in the first 24 months of employment, we will re-launch a search for a new candidate, under the original position specifications. In such a case, we will do so for no additional professional fee, though charging expenses that may incur to include all Affion travel, hotel, and re-posting of job advertisements. It is our commitment to partner with you from the initial signing of the contract until the candidate accepts and offer and begins employment.

## Reference List

### City of Kyle, TX

**Bryan Langley**
City Manager
100 W. Center Street
Kyle, TX 78640
972-984-0853
BLangley@cityofkyle.com

**Mayor Travis Mitchell**
100 W. Center Street
Kyle, TX 78640
(512) 944-0948
tmitchell@cityofkyle.com

*Affion had the pleasure of working with the City of Kyle on their City Manager search (2023), their City Attorney (2023) and their Director of Water Utilities searches (2023). Bryan was the successful candidate for the City Manager search, and we have worked with him on the last two searches; we worked closely with Mayor Mitchell throughout the City Manager search.*

### City of West Valley City, UT

**John Flores**
Director of Human Resources
3600 South Constitution Boulevard
West Valley City, UT 84119
801-232-0261
John.Flores@wvc-ut.gov

*Affion had the pleasure of working with the City of West Valley City, UT on their recent City Manager search (2023). We worked closely with John throughout the search process.*

### Town of Mooresville, NC

**Tiffany Shelley**
Director of Human Resources
413 N Main St
Mooresville, NC 28115
781-504-1963
tshelley@mooresvillenc.gov

**Jim Landon**
Interim Town Manager
413 N Main St
Mooresville, NC 28115
386-931-1792
jlandon@mooresvillenc.gov

*Affion had the pleasure of working with the Town of Mooresville on their recent Town Manager search (2023). We worked closely with Tiffany and Jim throughout the process; Jim served as the Board's liaison.*

## Client List

### Cities:

**Borough of State College, PA**
- Director of Public Works (2016; 2021)

**City of Addison, TX**
- City Secretary (2023)

**City of Ann Arbor, MI**
- Parks and Recreation Services Manager (2008)
- Parks and Recreation Services Deputy Manager (2008)
- City Administrator (2011)
- Fire Chief (2014)
- Police Chief (2015)
- City Administrator (2016)

**City of Arlington, TX**
- City Auditor (2014)
- Director of Community Development and Planning (2015)

**City of Aurora, CO**
- City Manager (2018)
- Court Administrator and Detention Director (2021)

**City of Asheville, NC**
- Urban Planning and Design Director (2014)
- Police Chief (2015)

**City of Atlanta, GA**
- Chief Information Officer (2003)

**City of Austin, TX**
- City Manager (2008)
- Fire Chief (2008)
- Chief Information Officer (2008)
- Director of Solid Waste Services (2009)
- Chief Sustainability Officer (2010)
- Director of Code Compliance (2011)
- Chief Financial Officer (2012)
- Austin Water Utility (AWU) Assistant Director, Engineering Services (2013)
- Austin Water Utility (AWU) Assistant Director, Pipeline Operations and Maintenance (2013)
- Assistant City Manager (2013)
- Purchasing Officer (2014)
- Deputy Director, Economic Development (2015)
- Redevelopment Division Manager (2015)
- Assistant Director of Water Res Planning & Analysis (2015)
- Austin Energy – CTO (2016)
- Austin Energy – Chief of Staff (2017)
- Fire Chief (2018)
- Director of Economic Development (2019)

**City of Austin, TX continued..**
- Director of Development Services (2019)
- Chief Information Security Officer (2020)
- Assistant Director of Economic Development (2020)
- Director of Austin Code (2020)
- Homeless Strategy Officer (2020)
- Assistant Director of Housing and Planning (2021)
- Chief Resiliency Officer (2021)
- Emergency Medical Services Chief (2021)
- Director, Austin Water (2022)
- Director, Transportation and Public Works (2023)

**City of Beaumont, TX**
- Police Chief (2024 - present)

**City of Bellevue, WA**
- Director of Planning and Community Development (2010)
- Chief Communications Officer (2012)
- Chief Economic Development Officer (2014)
- Chief Communications Officer (2016)
- Director of Planning and Community Development (2016)

**City of Boise, ID**
- Planning and Development Services Director (2021)
- Planning and Development Services Director (2024 - present)

**City of Boulder, CO**
- Director of Public Works for Utilities (2011)
- Deputy Director of Community Planning and Sustainability (2011)
- Comprehensive Planning Manager (2012)
- Human Resources Director (2013)

**City of Bozeman, MT**
- Human Resources Director (2021)
- Director of Transportation and Engineering (2021)
- Director of Utilities (2021)
- City Engineer (2022)
- Assistant City Manager (2022)
- Director of Utilities (2023)
- Assistant City Manager (2024 – present)

**City of Broken Arrow, OK**
- Fire Chief (2010)
- Police Chief (2011)
- City Manager (2012)
- Assistant City Manager (2013)
- Director of Engineering/Construction (2014)
- Fire Chief (2014)
- City Manager (2015)

**City of Burbank, CA**
- Director of Finance (2009)
- Director of Parks and Recreation (2007)

**City of Burleson, TX**
- Chief Technology Officer (2021)

**City of Cedar Park, TX**
- Director of Information Services (2018)
- Police Chief (2021)
- Director of Finance (2022)
- Assistant City Manager (2022)
- Director of Human Resources (2023)
- Assistant City Manager (2024 – present)

**City of Celina, TX**
- City Manager (2023)

**City of Chandler, AZ**
- Chief Information Officer (2007)
- Director of Economic Development (2008)
- Director of Planning and Development (2008)
- Municipal Utilities Director (2015)

**City of Chester, PA**
- Chief Operating Officer (2022)
- Director of Finance (2023)

**City of College Station, TX**
- Assistant Director of Planning & Development (2008)
- Fire Chief (2016)
- Chief Information Officer (2017)
- Director of Water Services (2018)
- City Manager (2018)
- Director of Planning and Development Services (2018)

**City of Columbia, MO**
- City Manager (2011)
- CIO (2015)

**City of Commerce City, CO**
- City Manager (2021)

**City of Corpus Christi, TX**
- City Manager (2008)

**City of Dallas, TX**
- Deputy Director CIS (2005)
- Public Information Officer (2005)
- Assistant Director Dallas Water Utilities (2005)
- Assistant Director CIS (2005)
- Director and Chief Information Officer (2005)
- Director of Housing (2014)
- Assistant City Manager (2014)
- Director of the Department of Trinity Watershed Management (2015)
- Fire Chief (2016)
- City Manager (2016)
- Assistant Director of Transportation (2022)

**City of Denton, TX**
- Director of Environmental Services and Sustainability (2021)

**City and County of Denver, CO**
- Manager of Community Planning and Development (2012)
- Independent Monitor (2021)

**City of Dublin, OH**
- CIO (2015)
- Planning Director (2015)
- City Manager (2022)

**City of Durango, CO**
- Director of Public Works (2021)
- Director of Parks and Recreation (2023)

**City of East Lansing, MI**
- City Manager (2012)

**City of El Paso, TX**
- City Manager (2014)
- Director of Museums and Cultural Arts (2014)
- Managing Director of Public Works (2015)
- Director of Planning and Inspections (2018)

**City of Eugene, OR**
- Executive Director of Planning and Development (2010)

**City of Farmers Branch, TX**
- City Manager (2022)

**City of Fort Collins, CO**
- Chief Sustainability Officer (2014)
- Light & Power Operations Manager (2015)
- Chief Human Resources Officer (2016)
- Cultural Services Director (2016)
- Transfort & Parking Services General Manager (2018)
- Director of Cultural Services (2018)
- Director of Planning, Development and Transportation (2019)

**City of Fort Worth, TX**
- Assistant City Manager (2022)

**City of Frisco, TX**
- City Manager (2022)
- Assistant City Manager (2023)
- Fire Chief (2023)
- Chief Information Officer (2023)
- Chief Financial Officer (2024 – present)

**City of Galveston, TX**
- City Manager (2011)

**City of Gardner, KS**
- Business and Economic Development Director (2015)
- Utility Director (2015)

**City of Georgetown, TX**
- Assistant City Manager (2021)
- Assistant Water Utility Director (2024 – present)

**City of Greeley, CO**
- Director of Human Resources (2020; 2022)
- City Clerk (2020; 2022)
- Finance Director (2020)
- Fire Chief (2021)
- Director of Public Works (2021)
- Human Resources Deputy Director (2021)
- Deputy Finance Director (2021)
- Culture, Parks and Recreation Director (2022)
- Human Resources Deputy Director (2022)
- Director of Communications and Engagement (2022)
- Community Development Director (2022)
- Deputy Director of Water Resources (2022)
- Payroll Manager (2023)
- Cultural Affairs Manager (2023)
- Finance Director (2023)
- Deputy Director of Finance (2023)

**City of Hollywood, FL**
- City Manager (2011)

**City of Huntsville, TX**
- City Manager (2008)

**City of Irving, TX**
- City Manager (2006)
- Assistant City Manager (2008)
- Internal Auditor (2008)
- Director of Human Resources (2007)
- Assistant Director of Human Resources (2007)
- City Attorney (2007)
- Fire Chief (2006)
- City Secretary (2010)
- Capital Improvement Program Director (2019)

**City of Kirkwood, MO**
- Chief Administrative Officer (2014)
- Police Chief (2017)

**City of Kyle, TX**
- City Manager (2023)
- City Attorney (2023)
- Director of Water Utilities (2023)

**City of Leander, TX**
- City Manager (2011)

**City of Los Angeles, CA**
- CIO-Los Angeles World Airport (2007)
- General Manager, ITA (2002)
- Information Systems Manager (2002)
- General Manager Department of Aging (2003)
- Director, Bureau of Sanitation (2004)
- Los Angeles Zoo: General Manager (2003)
- City Engineer (2003)

**City of Lynwood, CA**
- Assistant City Manager (2007)
- Director of Human Resources (2007)
- Assistant Director of Public Works (2007)
- Deputy Director of Development (2007)

**City of Marshall, TX**
- City Manager (2014)

**City of McKinney, TX**
- City Manager (2008)
- Assistant City Manager (2009)
- Director of Finance (2011)
- Director of Water Utilities and Infrastructure (2013)
- Assistant City Manager (2014)
- Director of Public Works (2016)
- Director of Housing and Community Development (2024 – present)
- Director of Code Services (2024 – present)

**City of Mesa, AZ**
- Deputy City Manager (2007)
- Director of Human Resources (2007)

**City of Missouri, City, TX**
- Director of Finance (2016)
- Director of Development Services (2016)
- Director of Economic Development (2022)

**City of Morgantown, WV**
- City Manager (2010)

**City of North Richland Hills, TX**
- City Manager (2009)
- General Manager: NRH2O, Water Park (2014)

**City of Pflugerville, TX**
- Assistant City Manager (2022)
- Communications Director (2023)

**City of Phoenix, AZ**
- Human Resources Director (2015, 2017)

**City of Plano, TX**
- City Manager (2010)
- City Attorney (2013)
- Director of Human Resources and Risk Management (2024 – present)

**City of Port Arthur, TX**
- Assistant City Manager (2016)
- Public Works Director (2016)

**City of Raleigh, NC**
- Director of Human Resources (2023)

**City of Round Rock, TX**
- City Manager (2010)
- Director of Human Resources (2012)
- Police Chief (2013)
- Deputy CFO (2021)

**City of San Angelo, TX**
- Director of Planning and Development Services (2023)
- Director of Water Utilities (2024 – present)

**City of San Antonio, TX**
- City Manager (2006)
- Assistant City Manager (2006)
- Director for the Office of Management and Budget (2020)
- Transportation Director (2020)
- Government Affairs Director (2021)
- Communication and Public Engagement Director (2021)
- Diversity, Equity, and Inclusion Officer (2022)
- Assistant Director of Human Resources (2023)
- Chief Resiliency Officer (2023)
- Public Safety Outcomes (2023)
- Animal Care Services Director (2024 – present)
- Fire Chief (2024 – present)

**City of San José, CA**
- Deputy Director of Administration (2006)
- Deputy Director of Integrated Waste Management (2006)

**City of San Marcos, TX**
- City Manager (2008)
- Human Resources Director (2011)
- Chief Building Official (2011)

**City of Savannah, GA**
- City Manager (2010)

**City of Scottsdale, AZ**
- Police Technology Director (2009)

**City of Shawnee, OK**
- City Manager (2015)

**City of Springfield, MO**
- City Manager (2008)

**City of Tacoma, WA**
- Assistant City Manager (2006)
- Director of Finance (2007)
- Director of Information Technology (2008)
- Assistant Director of Finance (2009)

**City of Tamarac, FL**
- Fire Chief (2009)
- Director of Community Development (2013)
- Assistant City Manager (2017)
- Public Services Director (2022)

**City of Taylor, TX**
- City Manager (2019)

**City of Thornton, CO**
- City Manager (2017)

**City of West Valley City, UT**
- City Manager (2023)

**Incorporated Village of Garden City, NY**
- Village Administrator (2014)

**Town of Mooresville, NC**
- Town Manager (2023)

**Town of Sunnyvale, TX**
- Director of Planning and Development Services (2023)

**Township of Derry, Hershey, PA**
- Township Manager (2018)

**Counties:**

**County of Los Angeles, CA**
- Information Systems Manager (2007)
- CIO-Los Angeles World Airport (2007)

**City and County of Denver, CO**
- Independent Monitor (2021)

**City and County of Philadelphia, PA**
- Chief Information Officer (2000)
- CIO-Philadelphia Free Library (2001)
- CIO-Philadelphia Police Department (2006)

**Delaware County, PA**
- Executive Director (2020)
- Health Department Director (2021)
- Director of Purchasing (2021)
- Diversity, Equity, and Inclusion Officer (2021)
- Prison Warden (2021)
- Director of Planning (2022)

**Laramie County, WY**
- Public Works Director (2014)

**Milwaukee County, WI**
- Director of Parks, Recreation & Culture (2013)

**Washtenaw County, MI**
- Community Development Director (2007)

**States:**

**Commonwealth of Pennsylvania-Office of Administration**
- Chief Information Officer (2008)
- Chief Technology Officer (2008)
- Deputy Chief Information Officer (2008)

**State of Texas, Austin, TX**
- Director of Benefits - Employee Retirement System of Texas (2006)
- CTO - Employee Retirement System of Texas (2005)
- Chief Information Officer of DIR (2006)

**Education:**

**Harrisburg University, Harrisburg, PA**
- Director of Learning Assessment (2009)
- E-Business Program Director / Faculty (2008)
- Learning Technologies Program Director / Faculty (2008)
- CIS Program Director / Faculty (2007)
- Biotechnology Professor (2008)
- VP for Development (2005)
- Director of Development (2007)
- Controller (2006)
- Network Administrator (2006)

**Other:**

**Austin Economic Development Council**
- President/CEO (2021)

**Austin Transit Partnership**
- Director of Accounting (2022)
- Chief Communications Officer (2022)
- Chief of Engineering and Construction (2022)
- Director of IT (2023)
- CFO (2023)

**Central Texas Regional Mobility Authority (CTRMA)**
- Executive Director (2020)

**Clarksville-Montgomery County EDC**
- President/CEO (2021)

**E-470 Public Highway Authority, Aurora, CO**
- Executive Director (2015; 2021)

**Housing Authority of the City of El Paso, TX**
- Chief Operating Officer (2010)

**International City/County Management Association (ICMA)**
- Chief Information Officer (2021)

**Minneapolis Parks and Recreation Board, MN**
- Assistant Superintendent of Planning (2011)
- Assistant Superintendent of Recreation (2012)
- Deputy Superintendent (2012)
- Assistant Superintendent of Environmental Stewardship (2012)
- Director of Park Safety and Security (2013)
- Human Resources Manager (2013)

**North Texas Municipal Water District (NTMWD)**
- Water System Manager (2018; 2022)

**Roanoke Redevelopment and Housing Authority**
- Executive Director (2006)

**Round Rock Chamber of Commerce, TX**
- President/Chief Executive Officer (2014)

**San Antonio Water System (SAWS)**
- Chief Information Officer (2016)
- Sr. Vice President / Chief Operating Officer (2022)

**Valley Regional Transit, ID**
- Executive Director (2022)

**Williamson-Burnet County Opportunities, Inc. (WBCO)**
- Executive Director (2013)

**Thank you for the opportunity to submit this proposal.**
**We look forward to assisting you with your**
**executive search needs!**

CPS HR CONSULTING

PROPOSAL

# City of De Pere

## Executive Recruitment Services for City Administrator

Due Date: April 23, 2024

SUBMITTED BY:
MELISSA ASHER
*Sr. Practice Leader, Products and Services*

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Your Path to Performance

CPS HR CONSULTING

April 23, 2024

Shannon Metzler, HR Director and Tracy Hood, HR Generalist
City of De Pere
335 S. Broadway
De Pere, WI 54115

***Submitted via email to: smetzler@deperewi.gov and thood@deperewi.gov***

**Subject: Executive Recruitment for City Administrator**

Dear Ms. Metzler and Ms. Hood:

CPS HR Consulting (CPS HR) is pleased to have the opportunity to submit a proposal to assist the City of De Pere (City) with the recruitment of a new City Administrator. We are uniquely qualified to undertake this effort as we have vast experience in assisting public agencies with executive search, screening, and placement.

We understand that each agency is unique, and our extensive experience allows us to tailor our process to specifically meet your needs. Our work with local government agencies throughout the United States gives us an in-depth understanding of government operations, programs, and services.

CPS HR offers a broad spectrum of human resource services while delivering personalized, results-oriented services, utilizing best practice methods of recruitment and selection strategies from our team of recruitment experts. Each recruitment is an opportunity to shape and prepare your organization for the future. We understand how important this transition is for you and are perfectly placed to assist you in this endeavor. Once this project begins, we will work with the City to tailor our process to highlight this exciting opportunity and attract the best possible candidates.

It is our commitment to work in partnership with your organization to a successful result.

Thank you for the opportunity to be considered for this assignment. Should you have questions or comments about the information presented in this proposal, **please contact me (916) 471-3358 or via email at masher@cpshr.us.**

Sincerely,

Melissa Asher

Melissa Asher
Senior Practice Leader, Products and Services

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# About CPS HR Consulting

***CPS HR Consulting has been assisting organizations with their talent management needs for over 35 years.*** We have unique expertise in delivering HR management and consulting services, employment testing, and assessment services to government agencies throughout North America. Our core competency is its knowledge of and expertise in the public sector.

OUR VISION:

Enabling people to realize the promise of public service

CPS HR offers clients a comprehensive range of competitively priced services, all of which can be customized to meet your organization's specific needs. We are committed to supporting and developing strategic organizational leadership and human resource management in the public sector. We offer expertise in the areas of organizational strategy, recruitment and selection, training and development, and organization and workforce management.

CPS HR occupies a unique position among its competitors in the field of government consulting; as a Joint Powers Authority, whose charter mandates that we serve only public sector clients, we actively serve all government sectors including Federal, State, Local, Special Districts, Higher Education, and Non-Profit Organizations. This singular position provides CPS HR with a systemic and extensive understanding of how each government sector is inter-connected to each other and to their communities. That understanding, combined with our knowledge of public and private sector best practices, translates into meaningful and practical solutions for our clients' operational and business needs**.**

With more than 100 full-time employees as well as 200+ project consultants and technical experts nationwide, CPS HR delivers breakthrough solutions that help public sector organizations impact the communities they serve. CPS HR has worked with more than 1,200 government and public/non-profit clients throughout the United States and Canada.

Our headquarters are located in Sacramento, California. We have regional offices in Texas, Colorado, and Southern California.

## Recruitment Experts

CPS HR specializes in the recruitment and selection of key professionals for cities, counties, special districts, and non-profits. Working in partnership with the governing body or selection team, we develop customized search strategies that focus on locating and recruiting qualified candidates who match the agency's unique needs. Our wealth of recruitment experience has been gained through ***more than 20 years*** of placing top and mid-level executives in public agencies throughout the United States.

- **Unmatched Recruitment Experience for Government Agencies.** CPS HR has extensive experience in recruiting executive-level professionals for public agencies across the United States. As a public agency ourselves, we understand how to work with and within government. Our understanding of public sector culture and policy uniquely sets us apart from our competitors.
- **Focus on Diversity Recruiting.** In the past three years, 57% of the candidates placed by CPS HR are female, members of ethnic minorities or both. To continue this trend, CPS HR is constantly assessing the best methods for reaching the broadest network of possible candidates. To that end, we have just signed a contract with Zoom Info, a new sourcing platform, that includes a diversity sourcing filter.
- **Seasoned Executive Recruiters.** Our recruiters possess a high level of expertise in recruiting and placing executive-level professionals. Our staff of experts includes an exceptional group of full-time employees as well as a full complement of subject matter experts, intermittent employees, and part-time employees with a variety of public and private sector experience.
- **Detailed Needs Assessments.** We conduct a detailed needs assessment to identify 1) future organizational direction; 2) challenges facing the position; 3) the working style and organizational climate; and 4) required core and job specific competencies as well as personal and professional characteristics.
- **Success Recruiting Non-Job Seeking Talent.** We recognize that the very best candidates for some types of positions may not be looking for a career change, therefore, our recruitment team takes a very aggressive approach to identify and recruit such candidates.
- **Vast Pool of Public Agency Contacts.** CPS HR maintains a database of candidates and an extensive network of external resources to leverage for executive-level positions. We utilize our vast pool of public and non-profit contacts to deliver a strong list of competitive candidates who will be well prepared to assist you in the accomplishment of your specific mission and goals.
- **Satisfied Clients.** ***Our executive search client satisfaction rating averages 4.6 on a scale of 5.*** While many companies talk about client satisfaction, how many measure the impact of that through assessing client satisfaction by distributing written surveys and tying the results of these surveys to their performance management system? CPS HR Consulting

does. A client satisfaction survey is sent at the end of every engagement requesting feedback on the quality of our staff, deliverables, and the overall consulting relationship.

- **Retention/Success Rate.** Our success rate is tied to the longevity of the candidates we place, currently more than 95% of our placements are still in their position after two years.
- **Partial list of recruitments.** Below is a brief listing of recent similar recruitments to show our experience with similar executive recruitments.

| Agency | Title | Year Completed |
|---|---|---|
| City of Simi Valley, CA | City Manager | Current |
| City of Arcata, CA | City Manager | Current |
| City of Phoenix, AZ | Assistant City Manager | 2023 |
| City of Phoenix, AZ | Deputy City Manager | 2023 |
| City of Baytown, TX | City Manager | 2023 |
| City of Littleton, CO | Deputy City Manager | 2023 |
| City of Littleton, CO | City Manager | 2022 |
| City of Oklahoma City, OK | Assistant City Manager | 2022 |
| City of Bellaire, TX | City Manager | 2022 |
| County of Trinity, CA | County Administrative Officer | 2022 |
| City of Nogales, AZ | City Manager | 2022 |
| County of Imperial, CA | County Executive Officer | 2022 |
| City of Turlock, CA | City Manager | 2022 |
| City of Dallas, TX | Assistant City Manager | 2022 |
| City of Tucson, AZ | Assistant City Manager/Chief Financial Officer | 2022 |
| City of Piney Point Village, TX | City Administrator | 2022 |
| City of Nogales, AZ | City Manager | 2022 |
| City of Surprise, AZ | City Manager | 2021 |
| City of Aztec, NM | City Manager | 2021 |
| County of Yolo, CA | County Administrative Officer | 2021 |
| City of Aurora, CO | Deputy City Manager | 2021 |
| City of Dickinson, TX | City Manager | 2021 |
| City of Dayton, TX | City Manager | 2021 |
| County of Los Alamos, NM | County Manager | 2021 |

| Agency | Title | Year Completed |
|---|---|---|
| City of Hercules, CA | City Manager | 2021 |
| City of Clayton, CA | City Manager | 2021 |
| City of Marysville, CA | City Manager | 2021 |
| County of Flathead, MT | County Administrator | 2021 |
| County of Yolo, CA | Assistant County Administrative Officer | 2020 |
| City of Greeley, CO | Deputy City Manager | 2020 |
| City of Reno, NV | City Manager | 2020 |
| City of Bozeman, MT | City Manager | 2020 |
| City of Richmond, CA | City Manager | 2019 |
| City of Columbia, MO | City Manager | 2019 |
| City of Union City, CA | City Manager | 2019 |
| Town of Paradise Valley, AZ | Town Manager | 2019 |
| City of Carson, CA | City Manager | 2019 |
| City of East Palo Alto, CA | City Manager | 2019 |
| City of Woodland Park, CO | City Manager | 2018 |
| City of Modesto, CA | City Manager | 2018 |
| Churchill County, NV | County Manager | 2018 |
| City of Sacramento, CA | Assistant City Manager | 2018 |
| County of San Luis Obispo, CA | City Manager | 2018 |
| City of Goodyear, AZ | City Manager | 2018 |
| County of Imperial, CA | County Executive Officer | 2018 |

# Our Approach

## Key Stakeholder Involvement

The Mayor and Common Council on behalf of the City of De Pere must be intimately involved in the search for a new City Administrator. Our approach assumes their direct participation in key phases of the search process. At the discretion of the Mayor and Council, other key stakeholders may also be invited to provide input for the development of the candidate profile.

## City's Needs

A critical first step in a successful executive search is for the Mayor and Council to define the professional and personal qualities required of the City Administrator. CPS HR has developed a very effective process that will permit the Mayor and Council to clarify the preferred future direction for the City; the specific challenges the City is likely to face in achieving this future direction; the working style and organizational climate the Mayor and Council wishes to establish with the City Administrator; and ultimately, the professional and personal qualities required of the City Administrator.

## Commitment to Communication

Throughout the recruitment process, we are strongly committed to keeping you fully informed of our progress. We will collaborate with you to provide updates on the status of the recruitment via your preferred method of communication (phone conference, email, etc.).

We place the highest level of importance on customer service and responding in a timely manner to all client and candidate inquiries. Our previous clients and candidates have expressed a sincere appreciation for our level of service and responsiveness to the management of the recruitment process. As a result, we have many long-term relationships with clients that have led to opportunities to assist them with multiple recruitments.

CPS HR's communication continues once you have selected the new City Administrator. We will contact the Mayor and Council and the newly appointed City Administrator within six months of appointment to ensure an effective transition has occurred.

## Aggressive, Proactive, and Robust Recruitment

We take an aggressive approach in identifying and recruiting the best available candidates. There are those candidates who would gladly rise to the professional challenge and apply for this position; however, some of the best candidates are often not actively seeking a new position and may only consider a change once we present them with your opportunity. Evoking the sense of vision and opportunity in qualified persons is among the responsibilities of CPS HR, and we pride ourselves in our efforts to reach the best available potential candidates. We use advertisements, directly email the outreach brochure, post messages and connect with potential candidates on business media such as LinkedIn, and of course, pick up the phone and call qualified individuals and referral sources.

## Diversity Outreach Process

CPS HR strives to attract the most highly qualified, diverse candidate pool possible. We are pleased that our diligent efforts have resulted in more than ***57%*** of our executive level placements being people of color and/or female candidates within the past three years.

We accomplished this by advertising with organizations like the National Forum for Black Public Administrators and the Local Government Hispanic Network in order to reach these specific population groups. We also seek candidate referrals from local subject matter experts and the national leadership of groups like Women Leading Government. By taking the time to directly contact these influential industry experts, we ensure that we capture the maximum number of distinguished candidates – particularly those who are well-known in their industries, but who may not be actively looking for a new job.

The result is incredibly diverse candidate pools. Our clients have been quite pleased with our process and end results.

# Methodology and Scope of Work

Our proposed executive search process is designed to provide the City with the full range of services required to ensure the ultimate selection of a new City Administrator is uniquely suited to the City's needs. CPS HR can perform **Outreach Only** or **Partial Recruitment** services if a **Full Recruitment** is not currently needed by the City.

**Phase I:** Our consultant will meet with the Mayor and Council to ascertain the City's needs and ideal candidate attributes, to target our search efforts, and maximize candidate fit with the City.

**Phase II:** The recruitment process is tailored to fit the City's specific wants and needs, with targeted advertising, combined with contacts with qualified individuals from our extensive database.

**Phase III:** The selection process is customized for the City. CPS HR will work with the Mayor and Council to determine the process best suited to the City of De Pere.

**Below is a breakdown of the services included in each recruitment option.**

| Task | Description | Outreach | Partial | Full |
|---|---|---|---|---|
| **Phase I - Develop Candidate Profile and Recruitment Strategy** | | | | |
| 1 | Finalize Schedule | | X | X |
| 2 | Hold Key Stakeholder Meetings | X | X | X |
| 3 | Develop Candidate Profile | X | X | X |
| 4 | Develop Recruitment Brochure | X | X | X |
| **Phase II – Aggressive, Proactive, and Robust Recruitment** | | | | |
| 1 | Place Ads | X | X | X |
| 2 | Identify and Contact Potential Candidates | X | X | X |
| 3 | Review Application Materials | | X | X |
| 4 | Conduct Screening Interviews | | X | X |
| 5 | Submit Client Report | | X | X |
| 6 | Client Meeting to Select Semifinalists | | X | X |

| | | | | |
|---|---|---|---|---|
| **7** | Notify Candidates | | **X** | **X** |
| **Phase III – Selection** | | | | |
| **1** | Prepare Assessment | | | **X** |
| **2** | Schedule Candidates; Coordinate Travel | | | **X** |
| **3** | Prepare Evaluation manuals | | | **X** |
| **4** | Facilitate Finalist Selection Process | | | **X** |
| **5** | Conduct Reference and Background Checks | | | **X** |
| **6** | Assist in Negotiation (if requested) | | | **X** |

## Phase I - Develop Candidate Profile and Recruitment Strategy

**Task 1 - Review and Finalize Executive Search Process and Schedule**

**Task 2 - Key Stakeholder Meetings**

**Task 3 - Candidate Profile and Recruitment Strategy Development**

**Task 4 - Develop Recruitment Brochure**

The first step in this engagement is a thorough review of the City's needs, culture and goals; the executive search process; and the schedule. CPS HR is prepared to meet with key stakeholders to obtain input in developing the ideal candidate profile and to assist us in understanding key issues and challenges that will face a new City Administrator. Activities will include:

- Identifying key priorities for the new City Administrator and the conditions and challenges likely to be encountered in achieving these priorities.
- Describing the type of working relationship the Mayor and Council wishes to establish with the City Administrator.
- Generating lists of specific competencies, experiences, and personal attributes needed by the new City Administrator in light of the discussions above.
- Discussing recruitment and selection strategies for the Mayor and Council's consideration to best produce the intended results.

CPS HR will provide a summary to the City stemming from these activities as an additional source of information for developing the candidate profile and selection criteria.

Following the completion of the workshop session, CPS HR will work with a professional graphic artist to design a recruitment brochure and present it to the City for review. Please refer to **Appendix A** for a sample brochure. Additional brochure examples are available on our website at www.cpshr.us/recruitment-solutions/executive-search.

## Phase II – Aggressive, Proactive, and Robust Recruitment

**Task 1 - Place Advertisements**

**Task 2 - Identify and Contact Potential Candidates**

**Task 3 - Resume Review and Screening Interviews**

**Task 4 - Mayor and Council Selects Finalists**

The recruitment process is tailored to fit the City's specific wants and needs, with targeted advertising, combined with personal contacts with qualified individuals from our extensive database.

CPS HR will prepare, submit for your approval, and publish advertisements on professional and affiliate websites to attract candidates on a nationwide, regional, local or targeted basis based on the recruitment strategy. Examples may include:

| Advertising Sources | |
|---|---|
| • City's website | • National Association of Counties |
| • CPS HR website | • Governmentjobs.com |
| • Careers in Government | • ICMA |
| • LinkedIn | • Public CEO |
| • National League of Cities | • Wisconsin City/County Management Association |

As a consulting firm that interacts with hundreds of public sector executives during engagements, we have a cadre of individuals who we inform of recruitments, both to increase the visibility of the opening and to attract appropriate individuals who fit the special needs of our client. Communication with these professionals ensures that an accurate picture of the requirements of the job is apparent and proliferated throughout their professional networks.

***CPS HR is focused on reaching a diverse candidate pool*** and would recommend publications/websites that are targeted to minority and female candidates. In addition to placing ads on websites aimed at minority candidates, we will contact leaders within appropriate associations to gain their insight and referrals of possible candidates.

***Within the past three years, more than 57% of our executive level placements have been minority and/or female candidates.***

CPS HR will prepare an email distribution list containing prospective candidates and referral sources. These individuals will receive a link to the City Administrator brochure along with a personal invitation to contact CPS HR should they have any questions about the position.

CPS HR maintains a comprehensive, up-to-date database of industry leaders and experienced professionals; however, we do not rely solely upon our current database.

We also conduct research to target individuals relevant to your specific needs and expectations to ensure that we are thorough in our efforts to market this position to the appropriate audience and to garner a diverse and quality pool of candidates.

We will:

- Convey a strong sense of the purpose and strategy of the City. For many talented individuals, understanding these aspects is one of the key motivators to compete in such an environment.
- Provide guidance and resources to candidates regarding the area's cost of living, mean and median housing prices, higher education opportunities, K-12 education information, and other aspects of interest to those who are considering relocating to the area.
- Actively seek highly qualified candidates who may be attracted by the prospect of collaboration with other departments, providing exceptional leadership to the City or continuing to ensure the public confidence in the integrity of the City.

CPS HR will directly receive and initially screen all resumes. This screening process is specifically designed to assess the personal and professional attributes the City is seeking and will include a thorough review of each candidate's resume, and if applicable, supplemental questionnaire responses and other supporting materials. CPS HR will personally speak to selected candidates during a preliminary screening interview and will spend extensive time ascertaining each candidate's long-term career goals and reasons why the candidate is seeking this opportunity, as well as gaining a solid understanding of the candidate's technical competence and management philosophy. We will gather data on any other unique aspects specific to this recruitment based upon the candidate profile, as well as conduct internet research on each candidate interviewed.

CPS HR will prepare a written report that summarizes the results of the recruitment process and recommends candidates for further consideration by the Mayor and Council. Typically, the report will recommend five to eight highly qualified candidates and will include resumes and a profile on each interviewee's background. CPS HR will meet with the Mayor and Council to review this report and to assist them in selecting a group of finalists for further evaluation.

## Phase III – Selection

**Task 1 - Design Selection Process**

**Task 2 - Administer Selection Process**

**Task 3 - Final Preparation for Appointment**

**Task 4 - Contract Negotiation (if requested)**

CPS HR will design a draft selection process based on information gathered in Phase I. We will meet with the City to review this process and discuss the City's preferred approach in assessing the final candidates. The selection process will typically include an in-depth interview with each

candidate but may also include other selection assessments such as an oral presentation, preparation of written materials, and/or problem-solving exercises.

We will coordinate all aspects of the selection process for the City. This includes preparing appropriate materials such as interview questions, evaluation manuals, and other assessment exercises; facilitating the interviews; assisting the City with deliberation of the results; and contacting both successful and unsuccessful candidates.

Following the completion of the selection process, CPS HR will be available to complete the following components:

- ***Arrange Follow-up Interviews/Final Assessment Process:*** Should the City wish to arrange follow-up interviews and/or conduct a final assessment in order to make a selection, CPS HR will coordinate this effort.
- ***Conduct In-Depth Reference Checks:*** The in-depth reference checks are a comprehensive 360-degree evaluation process whereby we speak with current and previous supervisors, peers, and direct reports. (It is our policy to not contact current supervisors until a job offer is made, contingent upon that reference being successfully completed, so as not to jeopardize the candidates' current employment situation.) Candidates are requested to provide a minimum of five references. CPS HR is able to ascertain significant, detailed information from reference sources due to our commitment to each individual of confidentiality, which leads to a willingness to have an open and candid discussion and results in the best appointment for the City. A written (anonymous) summary of the reference checks is provided to the City.
- ***Conduct Background Checks:*** Upon a conditional job offer, we will arrange for a background check of a candidate's records on driving, criminal and civil court, credit history, education, published news, and other sensitive items. Should any negative or questionable content appear during these checks, CPS HR will have a thorough discussion with the finalist(s) and will present a full picture of the situation to the City for further review.
- ***Contract Negotiation (if requested):*** Successful negotiations are critically important, and we are available to serve as your representative in this process. With our expertise, we can advise you regarding current approaches to various components of an employment package. We can represent your interests with regards to salary, benefits, employment agreements, housing, relocation, and other aspects, with the ultimate goal of securing your chosen candidate.

# Timeline

The project team CPS HR has selected is prepared to begin work upon receipt of a fully-executed contractual agreement. All search activities up to and including the selection of a new City Administrator can be completed in 14 to 16 weeks for a Full Recruitment. A Partial Recruitment can be completed in approximately 10 to 12 weeks, and an Outreach Only in about 4 to 6 weeks. The precise schedule will depend on the placement of advertising on appropriate professional and affiliate websites, and the ability to schedule, as quickly as possible, the initial meeting. A proposed schedule of major milestones is presented below.

| Task Name | Month 1 | | | | Month 2 | | | | Month 3 | | | | Month 4 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Weeks** | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| Initial Meeting | ➤ | | | | | | | | | | | | | | | |
| Draft Brochure | | ➤ | | | | | | | | | | | | | | |
| Brochure Approved/ Printed & Place Ads | | ➤ | | | | | | | | | | | | | | |
| Aggressive Recruiting | | | | | ➤ | | | | | | | | | | | |
| Final Filing Date | | | | | | ➤ | | | | | | | | | | |
| Preliminary Screening | | | | | | | ➤ | | | | | | | | | |
| Present Leading Candidates | | | | | | | | | ➤ | | | | | | | |
| Semi-finalist Interviews | | | | | | | | | | ➤ | | | | | | |
| Reference/ Background Checks | | | | | | | | | | | | ➤ | | | | |
| Final Interviews | | | | | | | | | | | | ➤ | | | | |
| Appointment | | | | | | | | | | | | | ➤ | | | |
| **Weeks** | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |

# Project Staffing

CPS HR has chosen a project manager who possesses extensive recruiting experience and a direct, in-depth understanding of local government. Our executive recruiter will work in collaboration with the City to fulfill the City's needs in a timely and effective manner. We are committed to providing each of our clients the same level of service excellence, and we take great care not to take on more work than this commitment allows. We will not utilize subcontractors for these services. No staff members will be removed or replaced without the prior written concurrence of the City.

| Role/Project Assignment | Name | Phone | Email |
|---|---|---|---|
| Executive Recruiter | David Niemeyer | (916) 471-3366 | dniemeyer@cpshr.us |

## Project Manager

### David J. Niemeyer, Executive Recruiter

David Niemeyer brings 40 years of local government management experience including managing 7 suburban communities. He brings an extensive practitioner's experience in government services to the CPS HR Executive Recruitment team through his roles as Village Manager, City Manager, Village Administrator, and City Administrator/Assistant to the Mayor. Human resources and senior executive recruitment are areas that he excels in and thoroughly enjoys.

Mr. Niemeyer led recruitments for over 50 local government executive and management positions. This included preparing recruitment profiles and brochures, screening candidates, and creating a list of top candidates for the elected officials, developing interview questions, managing assessment centers, conducting background checks, and negotiating employment offers.

He retired as a village manager in 2021 and has been an executive recruiter with CPS HR since then. As a city manager, he was a leader in economic and downtown redevelopment, developing strategic plans for his communities, and reorganizing service delivery to his communities to save money and better serve his residents. David has a reputation as an ethical, engaged, collaborative leader, who has excellent communication and listening skills. He has a calm, focused disposition and has worked with vocal and diverse elected boards and residents to develop a consensus on controversial issues.

Additionally, he has worked in a variety of different communities in terms of wealth, demographic, political stability, culture, and differing goals. A candidate that is successful in one community may not be successful in another, and so it is important that a recruiter understands the importance of candidate fit in an organization. Mr. Niemeyer's experience in diverse communities will help in screening candidates that are a good match for an organization.in diverse communities will help in screening candidates that are a good match for an organization.

**Employment History**

- Village Manager, Village of Tinley Park, IL
- Village Manager, Village of Oak Brook, IL
- Village Manager, Village of Homewood, IL
- City Manager, City of Des Plaines, IL
- Village Manager, Village of Richton Park, IL
- Village Administrator, Village of Orland Hills, IL
- City Administrator/Assistant to the Mayor, City of Harvard, IL

**Education**

- Master's in Public Administration, Northern Illinois University, DeKalb, IL 1985
- Bachelor of Science in Political Science, Northern Illinois University, 1983
- Minors: International Relations, Journalism
- ICMA Credentialed Manager and member of ICMA International Committee

**Activities**

- Member of ICMA, ILCMA, Metro Managers (past president)

# References

Provided below is a partial list of clients we have recently worked with in providing similar executive recruitment services. We are confident that these public-sector clients will tout our responsiveness and ability to successfully place candidates that were a good fit for their organization's needs.

| CLIENT/POSITIONS | CONTACT(S) |
|---|---|
| **City of Gillette, WY**<br>201 E 5th St<br>Gillette, WY 82716<br><br>City Manager Search (2023) | Deca Wasson, Human Resources Director<br>decaw@gillettewy.gov<br>(307) 686-5227 |
| **City of Cincinnati, OH**<br>805 Central Ave<br>Cincinnati, OH 45202<br><br>Fire Chief Search (2023)<br>Police Chief Search (2022) | Angela Wright, Chief of Staff<br>angela.wright@cincinnati-oh.gov<br>(513) 352-5335 |
| **Frederick County, MD**<br>12 E Church St<br>Frederick, MD 21701<br><br>City Diversity Officer Search (2023)<br>Housing Director Search (2023) | Emily Fiftal, Human Resources Division Director<br>efiftal@frederickcountymd.gov<br>(301) 600-1148 |

# Professional Fees and Guarantee

## Professional Services

Our professional fixed fee covers all CPS HR services and deliverables associated with a **Full Recruitment** *(Phases I, II, and III)* process**.**

Travel expenses for candidates who are invited forward in the interview process are not included.

| Professional Fixed Fees* | |
|---|---|
| **Professional Services for Full Recruitment** | **$30,000** |

**Professional fees for a Partial and Full recruitment would be billed and paid monthly. Professional fees for an Outreach/Advertising project will be billed and paid in full after the completion of the project*

## One-Year Service Guarantee

If the employment of the candidate selected and appointed by the City as a result of a **full executive recruitment** ***(Phases I, II, and III)*** comes to an end before the completion of the first year of service, CPS HR will provide the City with professional services to appoint a replacement. Professional consulting services will be provided at no cost. The City would be responsible only for expenses such as re-advertising, consultant travel, additional background checks, etc. **This guarantee does not apply to situations in which the successful candidate is promoted or re-assigned within the organization during the one-year period.** Additionally, should the initial recruitment efforts not result in a successful appointment, CPS HR will extend the aggressive recruiting efforts and screen qualified candidates until an offer is made and accepted. CPS HR does not provide a guarantee for candidates placed as a result of a partial or an outreach only recruitment effort.

CPS HR CONSULTING

***We thank you for your consideration of our proposal. We are committed to providing high quality and expert solutions and look forward to partnering with the City of De Pere in this important endeavor.***

*The City of Gillette is seeking an exceptional and forward-thinking leader to serve as its City Administrator. The City desires an entrepreneurial, collaborative leader who can engage with an active, diverse, and involved community, has experience leading and innovating on economic development issues, and who will bring a sense of urgency on issues affecting the community and the organization.*

# City Administrator

# THE CITY

Gillette is a fast paced, growing, vibrant community in northeast Wyoming. It is situated on the rolling plains of the Powder River Basin between the Black Hills of South Dakota and the Big Horn Mountains of Wyoming. The current population is estimated at 34,267, which is the third largest city in Wyoming. Gillette is a family-oriented community with excellent schools and has a two-year community college, which includes technical education and nursing education, as well as a technical training school. Gillette is also home to the reputable Western Welding Academy.

Gillette is centrally located in an area involved with the development of vast quantities of American coal, oil, and gas. Wyoming provides nearly 35% of the nation's coal, and Gillette calls itself the "Energy Capital of the Nation". It is also the county seat and a major economic hub for the State of Wyoming. It is also a regional center for media, education, health, and arts. Northeast Wyoming Regional Airport in Gillette is served by United Airlines / Skywest Airlines.

Mineral extraction industries have long been the driving force behind Gillette's efforts to create a family-friendly environment and also to pursue higher education and develop a career. As the world transitions away from coal as a primary power generation source, Gillette and Campbell County have begun an ambitious effort to diversify their economy while still utilizing the abundant natural resources in the Powder River Basin.

Gillette entertains visitors who are enroute to some of the nation's most famous national monuments, including Devils Tower National Monument, the Big Horn Mountain Range, and Mount Rushmore National Memorial. Gillette visitors can also experience Gillette's historic downtown, coal mine tours, buffalo ranch, museums, and more.

Arts, culture, and recreation are prominent in Gillette. Avenues of the Arts features sculptures by various artists in the region. The 9000 seat Wyoming Center at the CAM-PLEX hosts events from Broadway productions to PRCA rodeos. Campbell County has several recreational facilities, including a 190,000 square foot recreation center. The City is hosting for the first time the International Pathfinders Camporee, which will bring 55,000 people from around the world to Gillette in 2024, as well as the National High School Finals Rodeo.

Outside, pronghorn antelope hunting is some of the country's best, and residents and visitors also enjoy hiking and fishing. The City also has an abundance of parks and miles of bicycle/walking paths. The Energy Capital Outdoor Sports Complex hosts many sports tournaments and will soon be home to the multimillion-dollar Aquatic Center facility. Sports tourism is a growing industry in Gillette.

# CITY GOVERNMENT

The City of Gillette is a Home Rule City. The City is a Mayor / Council / Administrator form of local government. Gillette is governed by an elected mayor and a city council of six members. Gillette is split into three wards, each represented by two council members. The mayor and council members serve four-year terms.

The City Administrator is appointed by the Mayor and Council and has overall responsibility for all City departments and provides leadership, supervision, and general direction for the City Management team. City departments include Human Resources, Finance, Public Affairs, Police, Development Services, Public Works, and Utilities.

The City's 2022-23 budget was $153 million. The City has 275 full-time employees. The City Council and the residents are supportive of staff, and there are not major internal employee issues facing the next administrator. The City has a strong collaborative relationship with the county, schools, and other local governments in the region.

As with many growing communities, infrastructure projects will be one of the next administrator's priorities. The City recently approved the completion of a master plan for the city's network of pathways for pedestrians and cyclists that connect parts of the city.

The community and the Council are united on many issues, but as can be expected in a growing community, there are issues that divide the community and the Council that will require the use of consensus building skills by the next Administrator.

To learn more, visit www.gillettewy.gov

## PRIORITIES, INITIATIVES, AND CHALLENGES

- Supporting the local energy industry while continuing to look at new economic development initiatives to diversify the City's tax base.
- Developing a rebranding strategy.
- Addressing housing affordability issues. The City Council has recently approved a housing study to find possible solutions to our housing shortage and solutions for economical housing.
- Developing a city center plan.
- Continuing to develop innovative partnership and relationships with other local governments.
- Creating and implementing infrastructure plans to facilitate the city's growth. One major project includes the last stages of the completion of the Madison Water Project that has been a huge undertaking but will provide water sustainability to northeast Wyoming for generations to come.

# THE IDEAL CANDIDATE

The ideal candidate will:

- Have a high respect and understanding of Wyoming and Gillette qualities.
- Seek a long-term home and commitment to the City of Gillette.
- Exhibit the attributes of a top-notch leader, including integrity, transparency, resiliency, visionary, team builder, approachable, thick skinned.
- Follow through on issues in a timely and decisive manner; understands that many issues are not black and white.
- Be skilled in public relations and active in the community.
- Keep all elected officials equally informed of issues in the organization and the community.
- Be engaged and respected by employees.
- Have a strong background in community development and real estate.
- Be an innovative, solution orientated administrator who brings a sense of urgency to moving the organization and community forward.
- Have good written and oral communication skills, including being an active listener. Can communicate with people with diverse backgrounds.
- Be professional and non-political.
- Understand and know how to navigate legislative issues.
- Have strong financial skills.

# EDUCATION AND EXPERIENCE

A Bachelor's degree from an accredited four-year college or university required. A Master's degree in Public/ Business Administration is highly desirable. Proven executive-level municipal management experience as either a chief administrative officer, assistant CAO or senior department head level experience desired.. ICMA accreditation desired.

The City Administrator will be required to be a resident of Gillette.

# COMPENSATION AND BENEFITS

The compensation and benefits package will be competitive and negotiable depending on the experience and qualifications of the chosen candidate. The starting salary range for this position is **$170,000 to $200,000** annually DOQ.

The position offers the following benefits:

- 10 holidays per year.
- 17 days' vacation accrual per year, plus one annual personal day.
- 12 sick days accrual per year.
- 85/15 PPO health insurance plan for all full-time Gillette City employees and their dependents. 100% employer paid for high deductible plan.
- Dental and vision insurance.
- Group Life Insurance.
- Short and Long-Term Disability Insurance.
- Flexible Benefits Plans.
- Voluntary Deferred Compensation Program, including a negotiated contribution by the City.
- Wyoming Retirement Pension System. The City pays both the City and employee contribution to the pension system (currently, the employee share is 9.25% of their salary).

Some benefits currently offered to employees may be modified in the future.

# APPLICATION AND SELECTION PROCEDURE

This position is open until filled. To be considered for this exceptional career opportunity, submit your resume, cover letter, and a list of six work-related references that will not be contacted until the final interviews (two supervisors, two direct reports, and two colleagues) by the first resume review date of **July 12, 2023**. Resume should reflect years and months of employment, beginning / ending dates, as well as the size of staff and budgets you have managed.

Please go to our website to submit your application: https://www.cpshr.us/recruitment/2226

For further information contact:

CPS HR CONSULTING

David Niemeyer
CPS HR Consulting
(916) 471-3326
E-mail: dniemeyer@cpshr.us
Website: www.cpshr.us

Resumes will be screened in relation to the criteria outlined in this brochure. Candidates with the most relevant qualifications will be given preliminary interviews by the consultants. The most qualified candidates will be invited to a semi-final virtual interview process with the City. From there, the most qualified candidates will be invited to final interviews in Gillette in late August/early September. An appointment will be made by the City Council following comprehensive reference and background checks.

Proposal

APRIL 19, 2024

GovHR USA
GovTEMPS USA

MGT

# City Administrator Recruitment Services

## City of De Pere, Wisconsin

**Submitted by:**

MICHELE MORAWSKI
ASSISTANT DIRECTOR, CLIENT SERVICES
630 DUNDEE ROAD, SUITE 225
NORTHBROOK, IL 60062
224.415.3791
mmorawski@govhrusa.com

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# Cover Letter

April 19, 2024

Shannon Metzler, Human Resources Director
Tracy Hood, Human Resources Coordinator
City of De Pere
335 S. Broadway
De Pere, WI 54115

Dear Ms. Metzler and Ms. Hood,

Thank you for the opportunity to provide you with a proposal for the City Administrator recruitment and selection process for the City of De Pere, Wisconsin (City). Our proposal provides the City with firm qualifications, key experience, a detailed work plan and timeline, and associated fees to provide services that exceed expectations. We provide a tailored, personal approach to executive recruitment and selection, and can adapt to your specific requirements for the position.

We have some very exciting news to share. GovHR USA (GovHR) has recently been acquired by MGT of America Consulting, LLC (MGT). MGT is a nationally respected leader in public sector management consulting and technology services with a long track record in support of state, local, and education clients. GovHR and MGT are joining forces to take the next step in offering integrated solutions that can accelerate our most important shared goal: dramatically improving lives by ***advancing and lifting up the communities we serve***.

Our consultants have worked in all areas of local government leadership including city/county management, human resources, public safety, finance, public works, parks and recreation, and utilities. This combined hands-on knowledge and experience has made MGT and GovHR proven leaders in public sector consulting.

## MGT CONTACT INFORMATION

| | |
|---|---|
| **MGT HEADQUARTERS** | **MGT of America Consulting, LLC**<br>4320 West Kennedy Boulevard \| Tampa, Florida 33609<br>P: 813.327.4717 \| www.mgtconsulting.com<br>FEIN: 81-0890071 |
| **PROPOSAL CONTACT** | **Michele Morawski, Assistant Director, Client Services**<br>630 Dundee Road, Suite 225 \| Northbrook, Illinois 60062<br>224.415.3791 \| mmorawski@govhrusa.com |

Thank you for the opportunity to submit a proposal to the City of De Pere, Wisconsin. Should you have questions on any aspect of this proposal, please contact **Michele Morawski** at **224.415.3791** or **mmorawski@govhrusa.com**.

Regards,

Patrick J. Dyer, Vice President, *Authorized to bind the firm*

# Firm Profile

## *We impact the communities we serve – for good.*

MGT began operations in 1974 as a public sector research firm. Since then, we have significantly expanded our consulting capabilities and client offerings. Today, we are a national consulting firm specializing in ***assisting clients to operate more efficiently and effectively***.

MGT has acquired a keen understanding of the structures, operations, and issues facing public entities. This understanding comes from **nearly 50 years** of experience providing innovative yet practical solutions to public sector clients. We provide objective, creative, expert services in the areas of human capital, finance, technology, programming, and planning. We draw on the expertise of our highly qualified staff, most of whom have prior careers at city-, county-, and state-level government offices. This insider's knowledge of government operations and structure gives MGT a competitive advantage and an ability to hit the ground running from the very start of a project.

### MGT FIRM AT A GLANCE

**Name:** MGT of America Consulting, LLC (MGT)

**Founded:** 1974

**Locations:** Headquarters in Tampa, Florida; branch offices nationwide

**Staff:** 600+ consultants across the country

**Structure:** Privately held and client-driven

**Cooperative Contracts:**
Allied States Cooperative (ASC) #23-7449
The Interlocal Purchasing System (TIPS) #220601

**Lines of Business**: Government Consulting; Education and Financial Solutions; Diversity and Inclusion; Human Capital; Cybersecurity and Technology

MGT has successfully worked with clients on **more than 30,000 projects** to help them adapt to change while maintaining the vision and direction towards their short- and long-term goals. With the recent combination of GovHR, our firm includes **more than 600 professionals and administrative staff** to support our clients' success.

## Our Commitment

MGT embraces the most complex challenges with deep commitment, agility, and local expertise to make a measurable and profound social impact. Simply stated, our promise is:

## *We improve lives by advancing and lifting up your community.*

This purpose reflects the company's strong social conscience and service ethic that forms the core of the MGT "Why." MGT models this philosophy by systematically seeking out the highest-impact projects and relationships, encouraging community involvement, and investing in a collaborative and rewarding world-class work environment for employees.

Part of our success is based upon our ***promise to be flexible and responsive***. We are acutely aware of the political, economic, social, and technological factors that impact today's public sector clients. MGT is structured into several primary consulting divisions to support these needs. **We are pleased to have the Government Consulting Experts within the MGT Performance Solutions Group responsible for leading the completion of this project.**

# Performance Solutions

The MGT Performance Solutions team has an impressive track record of providing ***customized solutions, objective research, creative recommendations, and quality products*** that respond to each client's unique needs and time requirements. GovHR is now a part of MGT's Performance Solutions Team.

## GovHR USA

GovHR was originally formed as Voorhees Associates in 2009, changed its name to GovHR USA in 2013, and joined MGT ***(the nation's leading social impact firm)*** in 2023. GovHR provides public management consulting services to local government clients and other public-sector entities across the country. GovHR offers customized executive recruitment services, management studies, and consulting projects for local government and organizations who work with local government. Additionally, GovHR's GovTempsUSA division provides interim staffing solutions to keep operations moving during the recruitment process.

GovHR's consultants are experienced executive recruiters who have conducted **over 1,250 recruitments** working with cities, counties, special districts, and other governmental entities of all sizes throughout the country. They have held leadership positions within local government, giving them an understanding of the complexities and challenges facing today's public sector leaders.

### GOVHR'S LEADERSHIP

**Heidi Voorhees**
(847) 380-3240
HVoorhees@GovHRusa.com

*Ms. Voorhees has conducted more than 400 recruitments in her management consulting career, with many of her clients being repeat clients, attesting to the high quality of work performed for them. In addition to her 22 years of executive recruitment and management consulting experience, Ms. Voorhees has 19 years of local government leadership and management service, including ten years as Village Manager for the Village of Wilmette, Illinois.*

**Joellen Cademartori**
(847) 380-3238
JCademartori@GovHRusa.com

*Ms. Cademartori is a seasoned manager, with expertise in public sector human resources management. She has held positions from Human Resources Director and Administrative Services Director to Assistant Town Manager and Assistant County Manager. Ms. Cademartori has worked in forms of government ranging from Open Town Meeting to Council-Manager and has supervised all municipal and county departments ranging from Public Safety and Public Works to Mental Health and Social Services.*

# The Social Impact of MGT's Work

*Impacting Communities. For Good.*

## Defined by Our Impact

We understand the goals of the City of De Pere, Wisconsin and how this search process will ensure a diverse pool of highly qualified candidates for the City.

The MGT team empowers organizations to enhance their teams through innovations in people, processes, and technology to ***lift and strengthen their human resources solutions.***

# MGT's Primary Consulting Divisions

Our firm includes **more than 600 professionals and administrative staff** to support our clients' success. MGT is structured into the following primary consulting divisions, along with various internal infrastructure groups to support our operations and growth.

### Performance Solutions

Our Performance Solutions team provides world-class financial, human capital and equity solutions which enable clients to fully realize the potential of their most valuable resources. Our team excels at fiscal management and operational efficiency assessments that help clients make data-driven decisions, anticipate workforce issues, and integrate technologies to empower our clients to generate critical income and elevate enterprise performance objectives.

### Education Solutions

Our Education Solutions originate in our commitment to ensuring that every student has access to a high-quality education as they discover and realize their profound potential.

From pre-K-12 to higher education, we partner with schools, districts, state agencies and colleges and universities to deliver performance improvement and innovation and transformation planning and implementation.

### Technology Solutions

Our Technology Solutions business supports state, local, education and private companies as they seek to improve and protect their network infrastructure and data for greater resiliency. We offer world-class IT infrastructure management, cyber security and strategic IT professional staffing. Our deep engineering expertise is foundational to all MGT's technology solutions.

# Why Choose MGT/GovHR?

- ✓ ***Unparalleled Expertise and Level of Service***. With executive recruitment experience in 44 states, and in communities ranging in population from 1,000 to 3,000,000, we are a leader in the field of local government recruitment and selection. More than 40% of our clients are repeat clients, and 94% of surveys show our overall performance rating as ***Outstanding*** – indicating a plan to use our services and/or highly recommend us in the future.

- ✓ ***Delivering the Best***. We conduct comprehensive **due diligence** on candidates. Our state-of-the-art process includes extensive use of social media for candidate outreach and video interviews with potential finalist candidates, ensuring successful recruitment for the City. We will provide important information to potential candidates by developing a high quality, thorough Recruitment Brochure reflecting the knowledge we will have about your community and your organization. Before we recommend a candidate to you, **we ask probing questions** that will verify their expertise during video interviews, reference calls, and news and social media searches.

- ✓ ***A Partner from Start to Finish***. We are your partners in this important process. We welcome you to review all the resumes we receive, and we will share our honest assessment of the candidates. Our goal is your **complete satisfaction**. We can strategize with you on a variety of approaches for meeting your recruiting needs, including evaluation of internal candidates, identification of non-traditional candidates who meet your recruitment requirements, succession planning, and mentoring options. We are committed to working with you until you find the candidate that is the best fit for your position.

- ✓ ***Services for Any Budget and Any Search***. We strive to meet the specific needs of our clients by offering several options for recruitment services to meet your budget. Our services range from Full Executive Recruitments to Virtual Recruitments and even simply Professional Outreach for those who want to reach a broader network. In the following proposal, we have provided the scope we believe **best fits your needs**.

*"We were very impressed by how efficient they worked, their methodology, their insight, and their professionalism.*

*I would highly recommend MGT and hope to do business with them again for our next study."*

# Our Team

***The success of a consulting engagement is founded on the qualifications of the project team and the way in which it is structured and managed.***

MGT employs a team of professionals with backgrounds in local government and the not-for-profit sector. With the City's staffing needs in mind and due to the significance of this recruitment, we have assigned our highly knowledgeable and experienced consultant, Dave De Angelis. He will act as your project manager and primary point of contact for this project. His biography is attached as **Appendix A.**

## Project Manager & Main Point of Contact

**DAVE DE ANGELIS**
Senior Vice President
224-326-1280 x187
DDeAngelis@GovHRusa.com

## Proposal Inquiries

**MICHELE MORAWSKI**
Assistant Director
Client Services
224.415.3791
MMorawski@GovHRusa.com

# Project Approach & Methodology

***A detailed plan specifically designed for you.***

## Project Understanding

A typical recruitment and selection process takes approximately 175 hours to conduct. At least 50 hours of this time is administrative, including advertisement placement, reference interviews, and due diligence on candidates. We believe our experience and ability to professionally administer your recruitment will provide you with a diverse pool of highly qualified candidates for your position search.

Our clients are informed of the progress of their recruitment throughout the entire process. We are always available by mobile phone or email should you have a question or need information about the recruitment.

**MGT: EXPERTS IN RECRUITING**

***"The coordination by the consultant helped to alleviate the workload of internal staff. Consultant was willing to customize the process based on the City's needs."***

### MGT Client Satisfaction Components

## Proposed Work Plan

### PHASE 1
### POSITION ASSESSMENT, POSITION ANNOUNCEMENT, & BROCHURE

**Activities**

MGT treats each executive recruitment as a transparent partnership with our client. We believe in engaging with stakeholders early in each recruitment process to fully understand the challenges and opportunities inherent in the position. Understanding the organizational culture is critical to successful recruitment. We gain this insight and information through meetings (one on one and in small groups),

surveys, and a review of relevant information. This information is reflected in a polished marketing piece that showcases the organization and the area it serves.

### INFORMATION GATHERING

- One-on-one or group interviews with stakeholders identified by the City.
- Community forums (in-person or via video) can be used to gather input and feedback.
- Surveys can be used for department personnel and/or the community to gather feedback.
- Conversations/interviews with department heads.

A combination of the items listed above can be used to fully understand community and organizational needs and expectations for the position (this proposal includes 12 hours of meetings – additional meetings can be added for a fee of $150/hour plus actual expenses if incurred). One organizational survey is included. A Community Survey can be conducted for $2,500. Community Forums are conducted as an optional service.

Development of a **POSITION ANNOUNCEMENT** to be placed on websites and social media.

Development of a thorough **RECRUITMENT BROCHURE** for City review and approval.

Agreement on a detailed **RECRUITMENT TIMETABLE** – a typical recruitment takes between 90 to 120 days from the time you sign the contract to the appointment of the finalist candidate.

## PHASE 2
## ADVERTISING, CANDIDATE RECRUITMENT, & OUTREACH

### Activities

We make extensive use of social media as well as traditional outreach methods to ensure a diverse and highly qualified pool of candidates. Our website is well known in the local government industry – we typically have 17,000+ visits monthly to our website and career center. Additionally, our weekly jobs listings are sent to over 8,000 subscribers.

Phase 2 will include the following:

- MGT consultants will personally identify and contact potential candidates.
- Develop a database of potential candidates from across the country unique to the position and to the City, focusing on:
  - Leadership and management skills.
  - Size of organization.
  - Experience in addressing challenges and opportunities also outlined in Phase 1.
  - The database will range from several hundred to thousands of names. An email campaign will be sent to each potential candidate.
- Placement of the Position Announcement:
  - Public sector online Career Centers.
  - **Social media:** LinkedIn (posted on MGT Executives LinkedIn news feeds to reach over 50,000 connections), Facebook, and Instagram.
  - MGT will provide the City with a list of advertising options for approval.

## PHASE 3
## CANDIDATE EVALUATION & SCREENING

### Activities

Phase 3 will include the following steps:

- Review and evaluation of candidates' credentials with consideration to the criteria outlined in the Recruitment Brochure.
- Candidates will be narrowed down to those that meet the qualification criteria.
- Candidate evaluation process:
  - Completion of a questionnaire explaining prior work experience.
  - Live Video Interview (45 minutes to 1 hour) conducted by consultant with each finalist candidate.
  - References provided by the candidate are contacted.
  - Internet/Social Media search conducted on each finalist candidate.

All resumes will be acknowledged and inquiries from candidates will be personally handled by MGT, ensuring the City's process is professional and well regarded by all who participate.

## PHASE 4
## PRESENTATION OF RECOMMENDED CANDIDATES

### Activities

Phase 4 will include the following steps:

- MGT will prepare a Recruitment Report presenting the credentials of those candidates most qualified for the position.
- MGT will provide an electronic recruitment portfolio which contains the candidates' materials along with a "mini" resume for each candidate so that credentials are presented in a uniform way.
- The City will receive a log of all applicants and may review resumes if requested.
- Report will arrive in advance of the Recruitment Report Presentation.

MGT will meet with the City to review the recruitment report and provide additional information on the candidates.

## PHASE 5
## INTERVIEWING PROCESS & BACKGROUND SCREENING

### Activities

Phase 5 will include MGT completing the following steps:

- Develop the first and second round interview questions for City review and comment.
- Coordinate candidate travel and accommodations.
- Provide City with an electronic file that includes:
  - Candidates' credentials.

- Set of questions with room for interviewers to make notes.
- Evaluation sheets to assist interviewers in assessing the candidate's skills and abilities.

Background screening will be conducted along with additional references contacted:

**MGT BACKGROUND SCREENING**

- ✓ Social Security Trace & Verification
- ✓ US Federal Criminal Search
- ✓ Enhanced Verified National Criminal
  - National Sex Offender Registry
  - Most Wanted Lists: Federal Bureau of Investigation (FBI), Drug Enforcement Agency (DEA), Bureau of Alcohol, Tobacco, Firearms and Explosives (ATF), Interpol
  - Office of Foreign Assets Control (OFAC) Terrorist Database Search
  - Office of the Inspector General (OIG), General Services Administration (GSA), System for Award Management (SAM), Food and Drug Administration (FDA)
  - All felonies and misdemeanors reported to the National Database
- ✓ County/Statewide Criminal
- ✓ Civil Search
- ✓ Bankruptcy, Leans, and Judgements
- ✓ Motor Vehicle Record
- ✓ Education Verification – All Degrees Earned

**Optional:** Credit Report – Transunion with score (based on position and state laws)

**Optional:**

- Professional License Verification
- Drug Screen
- Employment Verification

MGT will work with you to develop an interview schedule for the candidates and coordinate travel and accommodations. MGT consultants will be present for all the interviews, serving as a resource and facilitator.

MGT will coordinate a 2-Step Interview process. The first-round interviews will include four to five candidates. The second-round interviews will include two or three candidates. MGT will supply interview questions and an evaluation form.

In addition to a structured interview, the schedule can incorporate:

- Tour of City facilities.
- Interviews with senior staff.

## PHASE 6
## APPOINTMENT OF CANDIDATE

### Activities

- MGT will assist you as much as requested with the salary and benefit negotiations and drafting of an employment agreement, if appropriate.
- MGT will notify all applicants of the final appointment, providing professional background information on the successful candidate.

# Project Timeline

Based on our experience in conducting similar projects, we anticipate the proposed project can be completed within 14 weeks of project initiation as illustrated in **Exhibit 1**.

*Exhibit 1. Proposed Schedule*

| WORK PLAN TASKS | WEEK | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| Phase 1: Position Assessment, Position Announcement, & Brochure | ■ | ■ | | | | | | | | | | | | |
| Phase 2: Advertising, Candidate Recruitment, & Outreach | | | ■ | ■ | ■ | ■ | | | | | | | | |
| Phase 3: Candidate Evaluation & Screening | | | | | | | ■ | ■ | ■ | | | | | |
| Phase 4: Presentation of Recommended Candidates | | | | | | | | | | ■ | | | | |
| Phase 5: Interviewing Process & Background Screening | | | | | | | | | | | ■ | ■ | | |
| Phase 6: Appointment of Candidate | | | | | | | | | | | | | ■ | ■ |

# Commitment to Diversity, Equity, & Inclusion in Recruitments

MGT is a leader in diversity, equity, and inclusion (DEI) consulting services, strategic planning, and organization transformation. MGT's experience working in diverse communities across the United States and working with organizations seeking to change organization culture is critical to the success of all our projects. We have a track record of building awareness, solutions, and direction for systemic change by generating transformative ideas and solutions, information, and practices into operational strategies, which help us stand out in all our projects.

MGT is also one of the original and premier disparity research firms in the country. Disparity studies were the first instance of bringing principles of diversity, equity, and inclusion into the public sector, through the procurement process, and since 1990, **MGT has conducted more than 230 public sector disparity studies**. These studies are designed to improve procurement departments, promote and advance equity, and improve economic outcomes for diverse communities that have been historically marginalized by analyzing policies, practices, and programs to increase the utilization of minority- and women-owned businesses. Clients that have conducted a disparity study are in the unique position to increase and improve systematic equity through procurement and contracting, which can ultimately promote economic empowerment by creating strong business and employment pipelines in communities of color.

MGT's GovHR also has a long-standing commitment to DEI. Since the firm's inception they have supported, with their time and financial resources, organizations that advance underrepresented populations in local government. These include the National Forum for Black Public Administrators, the Local Government Hispanic Network, The League of Women in Government, and CivicPride. Our Team Members have moderated and spoken on DEI topics at the International City and County Management Association conference and state conferences. Our employees and consultants have undergone Implicit Bias Training, and we are frequent speakers on incorporating equity and inclusion into all levels of local

government. Additionally, we provide a list of DEI resources on the homepage of the website at GovHRusa.com.

MGT's GovHR has formally partnered with the National Forum for Black Public Administrators' consulting arm, i4x, and in several recruitment and selection processes throughout the country including Toledo, OH; Fort Collins, CO; Ann Arbor, MI; Oakland, MI; and Arlington, TX. Our partnership reflects our mutual commitment to advancing DEI values and increasing the diversity of local government leaders at the highest levels of local government organizations.

## MGT/GovHR's Recommendations to RECRUIT and Retain Top Talent

**RESPONSIVE: ROLL OUT THE WELCOME MAT!** Candidates may struggle with relocating for a new position as well as being concerned about the "fit" with a new team. It is important to include costs for your top candidate(s) to travel to your location for the final interview process. Our team will work with you to create a welcoming, informative experience for both you and the candidate(s).

**ENCOURAGING:** Employee development is a must-have in today's market. Candidates appreciate their employer investing in them as much as they are investing themselves in the job. Consider "up and coming" candidates who may lack one or two preferred skills and assign a mentor or invest in a course to encourage their professional development. A mentor/training program will also help establish a peer-to-peer connection and make them feel more comfortable about the transition to a new job.

**COMPETITIVE:** Our team will guide you in offering a competitive market rate compensation and competitive benefits package attractive to today's candidates. Competitive employers must include relocation expenses and should consider signing bonuses and temporary housing.

**RESOURCEFUL:** Review your job description – do you need public sector experience? Are the years' experience you list essential, or can that be preferred? Consider a more resourceful approach when reviewing candidates' experience. Carefully assess requirements such as Certified Public Accountant (CPA), Professional Engineer, and others that will limit your talent pool – consider using the word "ideally" or "preferably."

**UNDERSTANDING:** These past few years have, without a doubt, changed the work environment. Competitive employers have recognized this and are offering flexible/hybrid/remote work options. Those positions that offer this type of flexibility consistently receive a better candidate response rate.

**INNOVATIVE:** Think about what is unique and attractive about your community and organization and highlight that in your recruitment efforts. Talk about organizational culture and what your values are with respect to your employees. MGT will assist you in being as innovative as possible in your outreach.

**TRANSPARENT:** Some states now mandate listing salary ranges in any job advertisements or postings. More and more companies are showing at least a salary range in their postings to promote pay transparency and equity. Post the salary range you will use for hiring – it is public information. If we make it too difficult for candidates to find out the salary, they will move on to the next opportunity.

# References

## *A leader in local government recruitment and selection.*

More than one-third of the organizations served by MGT's GovHR have contracted for multiple projects; we feel repeat business is the greatest testament to our commitment to customer service and client satisfaction. We encourage you to contact any of our references to learn of our professionalism, ability to meet timelines, and the expertise of our staff.

### WAUKESHA, WI

DR. MARQUOISE D. VASQUEZ, DIRECTOR OF HUMAN RESOURCES
201 DELAFIELD STREET, 3RD FLOOR | WAUKESHA, WI 53188
262-524-3700 | MVASQUEZ@WAUKESHA-WI.GOV
MGT's GovHR provided recruitment and selection services for the following positions:

- City Administrator, 2023
- Finance Director, 2022
- Cemetery Director - Limited, 2021
- Finance Director, 2020
- Chief of Police, 2020
- HR Director, 2019
- Director of Information Technology, 2017

### BELOIT, WI

HANNAH KUEHNE, HUMAN RESOURCES DIRECTOR
100 STATE STREET | BELOIT, WI 53511
608-364-6612 | KUEHNEH@BELOITWI.GOV
MGT's GovHR provided recruitment and selection services for the following position:

- Battalion Chiefs (3), 2022
- Chief of Police, 2020
- Economic Development Director, 2020
- Fire Chief, 2020
- Director of Housing Authority, 2018
- Assistant Fire Chief & Deputy Fire Chief, 2017
- Director of Public Works, 2017

**OAK CREEK, WI**

ANDREW VICKERS, CITY ADMINISTRATOR

8040 S. 6TH STREET | OAK CREEK, WI 53154

AVICKERS@OAKCREEKWI.ORG

MGT's GovHR provided recruitment and selection services for the following position:

- Community Development Director, 2024
- Human Resources Manager, 2022
- Neighborhood Preservation Officer - Professional Outreach, 2021
- Assistant City Administrator/Comptroller, 2020
- Assistant Comptroller - Professional Outreach, 2019
- Design Engineer - Professional Outreach, 2019
- Zoning Administrator - Professional Outreach, 2019
- HR Manager, 2018
- City Administrator, 2016

# Cost Proposal

***Defined by Impact. Driven by People.***
***Dedicated to the Community.***

**We take pride in customizing our client's needs — and we will work with you to ensure our fees are aligned with your expectations and budget.**

## Full Scope Recruitment

| Summary of Costs | Price |
|---|---|
| **Recruitment Fee** | $21,500 |
| **Recruitment Expenses (not to exceed)**<br>Expenses include candidate due diligence efforts | $1,500 |
| **Advertising**<br>**Advertising costs over $2,000 will be placed only with client approval. If less than $2,000, Client is only billed for actual cost.* | $2,000* |
| **TOTAL:** | **$25,000**** |

***Consultant travel expenses are not included in the price proposal. If the consultant is requested to travel to the client, travel costs will be estimated at time of request. Only actual expenses will be billed to the City for reimbursement.*

Possible in-person meetings could include:

- Recruitment brochure interview process
- Presentation of recommended candidates
- Interview Process

Any additional consultant visits requested by the City (beyond the three visits listed above) will be billed at $150/hour. The additional visits may also result in an increase in the travel expenses billed.

*This fee does not include travel and accommodation for candidates interviewed.

## Payment for Fees & Services

- **1st Invoice:** Contract Award (40% of the Recruitment Fee).
- **2nd Invoice:** Presentation of Candidates (40% of the Recruitment Fee & expenses incurred to date).
- **Final Invoice:** Completion of Recruitment (20% of the Recruitment Fee plus all remaining expenses).

Payment of invoices is due within thirty (30) days of receipt.

## Our Guarantee – Full Scope Recruitment

MGT is committed to assisting our clients until a candidate is appointed to the position. Therefore, no additional professional fee will be incurred if the client does not select from the initial group of recommended candidates and requests additional candidates be developed for interview consideration. If additional advertising beyond Phase I advertising is requested, the City will be billed for actual advertising charges. Reimbursable expenses may be incurred should the recruitment process require consultant travel to the City.

Upon appointment of a candidate, MGT provides the following guarantee: should the selected and appointed candidate, at the request of the City or the employee's own determination, leave the employ of the City within the first 12 months of appointment, we will, if desired, conduct one additional recruitment for the cost of expenses and announcements only. This request must be made within six months of the employee's departure.

# Optional Services

## *The Nation's Recruitment Leader.*

Having a solid plan in place is the only way to reach your long-term vision and goals, and we want to see you thrive. Our variety of services can be personalized to make the most of your strengths and give you an extra layer of support where you need it. We offer the following additional service offerings:

### GOVTEMPSUSA

Need an Interim? GovTempsUSA, a division of MGT, specializes in the temporary placement of positions in local government. The firm offers short-term assignments in addition to long-term and outsourced arrangements. Our placement professionals at GovTempsUSA have typically enjoyed distinguished careers in local government and displayed a commitment to public service throughout their careers.

### RECORDED ONE-WAY VIDEO INTERVIEW OF CANDIDATES

Candidates we recommend for your consideration can complete a one-way video interview with three to five questions that will be recorded and which you can review electronically at your convenience. This can occur prior to making your decision on which candidates to invite for an interview at a cost of $100 per candidate.

### LEADERSHIP/PERSONALITY TESTING

MGT has experience working with a wide variety of leadership and personality assessment tools, depending on the qualities and experiences the City is seeking in their candidates. These include but are not limited to Luminaspark, Caliper, DISC, and others. Depending on the evaluation type, selected fees can range between $100 to $500 per candidate.

### 360° EVALUATION

As a service to the City, we offer the option of providing you with a proposal for a 360° performance evaluation for the appointed position at six months into their employment. This evaluation will include seeking feedback from both elected officials and department directors, along with any other stakeholder the City feels would be relevant and beneficial. This input will be obtained on a confidential basis with comments known only to the consultant. If you are interested in this option, MGT will prepare a proposal for this service.

# Appendix A. Consultant Biography

The biography of our proposed consultant is provided on the following page.

GovHR USA
GovTEMPS USA
MGT

# David De Angelis

*Senior Vice President | GovHR, within MGT's Social Impact Solutions*

**David De Angelis is a Senior Vice-President with GovHR USA, working on both executive search, general management consulting assignments as well as interim administrator roles. He has more than 30 years of experience in local government administration and leadership.**

David has experience as both a full-time elected mayor for the City of Muskego for nine years as well as Village Manager for Elm Grove for almost 21 years. In both communities he was an innovator for process change and further professionalization of the organizations while creating positive workplace collaborative improvements and collegial work environments. This was done both in the high growth 1990's and the fiscally challenging 2000's until today.

David has also completed multiple organizational evaluations for his communities over the years including upsizing and rightsizing operations, both of which were achieved with an attention to existing staffing and fiscal sustainability. David has had a direct hand in guiding human resources functions for both the City of Muskego and the Village of Elm Grove including the recruitment of all executive positions and department-level staff.

Since joining GovHR in August of 2023, David has been involved in or conducted 10 recruitments across multiple disciplines, including administrators, community development directors, Highway Commissioner, Criminal Justice Reform, Public Works Directors, and treasurer. Mr. De Angelis has proven himself to be a regional leader in intergovernmental cooperation working across all lines of government. He was a founding member of the Waukesha County Cooperation Council, Community Liaison for the regional sewage district (Milwaukee Metropolitan Sewerage District), and Chairmen of the Act 150 County Library Committee, as well as having been part of multiple regional studies through the Southeastern Regional Planning Commission and State of Wisconsin study committees.

## Professional Education

Bachelor of Science in Business Management, Cardinal Stritch University

Certified Public Administrator, University of Wisconsin, Milwaukee

Credentialed Manager, ICMA (non-active)

## Memberships & Affiliations

Board of Directors – Past President Wisconsin City/County Management Association

Board of Directors – Past President of the Milwaukee Area Municipal Employers Association

Board of Directors – President (18 years) of League of Wisconsin Municipalities Mutual Insurance

Board of Directors – League of Wisconsin Municipalities

Board of Directors – Waukesha County Economic Development Corporation

## Professional Background

### 30 Years of Experience in Local Government

- Village Manager, Elm Grove, WI, 2002-2023
- Mayor, City of Muskego, WI, 1993-2002

## Awards

American Planning Association Legislator of the Year Award 2002 Life

Lifesaving Award- City of Muskego

James R. Ryan Lifetime Achievement Award, Wisconsin Public Policy Forum

## Professional Development & Speaking Engagements

Guest lecturer University of Wisconsin – Milwaukee, MPA program

Presentations to GFOA WI on Tax Incremental Law Changes

Presentations to Wisconsin City/County Managers Associations on Law changes, management styles, and local government cooperation

# Appendix B. Client List

A list of the clients we have had the pleasure of partnering with that complements the City's recruitment request is provided on the following page.

GovHR USA
GovTemps USA
MGT

## City Management Client List (2019 - Present)

| State | Client | Position Title | Year | Population |
|---|---|---|---|---|
| Alaska | Bethel | City Manager | 2019 | 6,500 |
| | Bethel | City Manager | 2023 | 6,500 |
| | Homer | City Manager (Professional Outreach) | 2019 | 5,300 |
| | Homer | City Manager (Professional Outreach) | 2024 | 5,300 |
| | Seward | City Manager | 2019 | 2,693 |
| Arizona | Buckeye | City Manager | 2021 | 69,744 |
| | Kingman | City Manager | 2023 | 34,669 |
| California | Antioch | City Manager | 2024 | 115,264 |
| Colorado | Dacono | City Manager | 2024 | 6,494 |
| | Englewood | City Manager | 2019 | 34,957 |
| Connecticut | Bloomfield | Town Manager | 2024 | 21,301 |
| | East Hampton | Town Manager | 2019 | 13,000 |
| | Enfield | Town Manager | 2022 | 45,246 |
| | Granby | Town Manager | 2023 | 11,375 |
| | Manchester | General Manager | 2021 | 59,710 |
| | Simsbury | Town Manager | 2023 | 25,517 |
| Florida | Apopka | City Administrator | 2024 | 55,496 |
| | Deerfield Beach | Assistant City Manager | 2022 | 80,000 |
| | Gainesville | Assistant City Manager | 2021 | 133,997 |
| | Lakeland | City Manager | 2020 | 110,000 |
| | Ponce Inlet | Town Manager | 2022 | 3,411 |
| Georgia | Albany | City Manager | 2021 | 77,434 |
| Illinois | Centralia | City Manager | 2020 | 13,000 |
| | Crest Hill | City Administrator | 2021 | 21,169 |
| | Crest Hill | City Administrator | 2024 | 21,169 |
| | Decatur | Deputy City Manager | 2019 | 76,178 |
| | Evanston | Deputy City Manager (2) | 2024 | 75,000 |
| | Forsyth | Village Administrator | 2021 | 3,490 |
| | Fox Lake | Village Administrator | 2021 | 10,550 |
| | Galesburg | City Manager | 2022 | 33,706 |
| | Galesburg | City Manager | 2023 | 33,706 |
| | Geneseo | City Administrator (Virtual) | 2019 | 6,500 |
| | Greenville | City Manager | 2021 | 7,000 |
| | Homewood | Assistant Village Manager (Virtual) | 2021 | 19,464 |
| | Kenilworth | Village Manager | 2024 | 2,562 |
| | La Grange | Village Manager | 2022 | 15,610 |
| | La Grange Park | Assistant Village Manager | 2020 | 13,579 |
| | Lake Barrington | Village Administrator | 2022 | 4,879 |
| | Lake Bluff | Assistant to the Village Administrator | 2023 | 5,698 |
| | Lake Forest | Assistant City Manager (Professional Outreach) | 2022 | 19,375 |
| | Lake Villa | Assistant to the Village Administrator | 2023 | 8,774 |
| | Long Grove | Village Manager | 2023 | 8,153 |
| | McHenry | City Administrator | 2023 | 27,135 |

| | | | | |
|---|---|---|---|---|
| | Morton Grove | Village Administrator | 2024 | 23,000 |
| | Mundelein | Village Administrator | 2020 | 31,385 |
| | Niles | Village Manager | 2021 | 30,001 |
| | North Chicago | Chief of Staff | 2021 | 30,020 |
| | Northbrook | Village Manager | 2021 | 35,000 |
| | Northfield | Village Manager | 2023 | 5,400 |
| | Oak Brook | Village Manager | 2021 | 8,058 |
| | Oak Park | Assistant Village Manager/Human Resources Director | 2019 | 52,000 |
| | Oak Park | Village Manager | 2021 | 52,000 |
| | Oak Park Township | Township Manager | 2023 | 51,774 |
| | Orland Park | Village Manager | 2019 | 60,000 |
| | Palos Heights | City Administrator (Virtual) | 2021 | 12,480 |
| | Peoria | Assistant City Manager | 2021 | 115,234 |
| | Pingree Grove | Village Manager | 2020 | 10,000 |
| | Pingree Grove | Village Manager | 2023 | 10,000 |
| | Plainfield | Village Administrator | 2021 | 41,734 |
| | Princeton | City Manager | 2019 | 7,700 |
| | River Forest | Village Administrator | 2021 | 11,635 |
| | Rock Island | City Manager | 2021 | 39,684 |
| | Savoy | Village Administrator (Virtual) | 2020 | 8,607 |
| | Schaumburg Township | Township Administrator (Virtual) | 2021 | 140,000 |
| | Sycamore | City Manager (Professional Outreach) | 2021 | 18,557 |
| | Vernon Hills | Village Manager | 2021 | 25,911 |
| | Villa Park | Assistant Village Manager (Virtual) | 2021 | 22,038 |
| | Villa Park | Village Manager | 2022 | 22,038 |
| | Washington | City Administrator | 2021 | 15,700 |
| | Wauconda | Village Administrator | 2021 | 14,125 |
| | West Chicago | Assistant City Administrator | 2022 | 27,221 |
| | West Dundee | Assistant Village Manager/Administrative Services Director (Virtual) | 2024 | 8,000 |
| | Willowbrook | Village Administrator | 2019 | 8,967 |
| | Winnetka | Assistant Village Manager | 2019 | 12,417 |
| Indiana | St. John | Town Manager (Professional Outreach) | 2020 | 18,047 |
| Iowa | Ames | Assistant City Manager (Limited) | 2023 | 66,498 |
| | Indianola | City Manager | 2022 | 15,833 |
| | Knoxville | City Manager | 2021 | 7,300 |
| | Marion | Deputy City Manager | 2022 | 30,000 |
| | Muscatine | City Administrator | 2020 | 23,819 |
| | Windsor Heights | City Administrator | 2023 | 4,860 |
| | Windsor Heights | City Administrator | 2019 | 4,860 |
| Kentucky | Paducah | City Manager | 2021 | 24,850 |
| | Paris | City Manager | 2021 | 9,846 |
| Maine | Bangor | City Manager | 2021 | 33,039 |
| Maryland | Sykesville | Town Manager | 2019 | 3,941 |
| | Takoma Park | City Manager | 2023 | 17,629 |
| | Westminster | City Administrator | 2021 | 18,522 |
| Massachusetts | Brookline | Assistant Town Administrator - Finance (Virtual) | 2022 | 58,732 |
| | Wayland | Town Manager | 2022 | 13,882 |
| | Williamstown | Town Manager | 2021 | 8,400 |

| | | | | |
|---|---|---|---|---|
| Michigan | Adrian | City Administrator | 2020 | 20,[illegible] |
| | Charlotte | City Manager | 2020 | 9,100 |
| | Clawson | City Manager | 2021 | 11,946 |
| | Eastpointe | City Manager | 2019 | 32,673 |
| | Ferndale | City Manager | 2019 | 20,428 |
| | Lincoln Park | City Manager | 2019 | 36,665 |
| | Rochester | City Manager | 2022 | 13,017 |
| | Royal Oak | City Manager | 2020 | 59,112 |
| | St. Clair Shores | Assistant City Manager (Professional Outreach) | 2021 | 59,984 |
| | Troy | Assistant City Manager | 2019 | 83,181 |
| | Troy | City Manager | 2024 | 83,181 |
| Minnesota | Becker | City Administrator | 2021 | 4,874 |
| | Blaine | Director of Administrative Services | 2024 | 67,939 |
| | Buffalo | Assistant City Administrator | 2021 | 15,855 |
| | Edina | Assistant City Manager (Limited) | 2023 | 53,318 |
| | Fairmont | City Administrator | 2024 | 10,477 |
| | Hibbing | City Administrator | 2021 | 15,855 |
| | Lindström | City Administrator | 2023 | 4,888 |
| | Minnetonka | City Manager | 2022 | 53,953 |
| | Scandia | City Administrator | 2023 | 4,149 |
| | St. Joseph | City Administrator | 2022 | 7,342 |
| | St. Louis Park | City Manager | 2021 | 48,662 |
| | Waconia | City Administrator | 2021 | 13,500 |
| Missouri | Ballwin | City Administrator | 2020 | 30,181 |
| | Cape Girardeau | City Manager | 2020 | 38,000 |
| | Ozark | City Administrator | 2024 | 21,284 |
| | University City | Assistant City Manager | 2020 | 35,172 |
| | University City | Assistant to the City Manager/Director of Human Resources | 2020 | 35,172 |
| | Warrensburg | City Manager | 2021 | 20,200 |
| | Webster Groves | City Manager | 2020 | 22,800 |
| | Wildwood | City Manager | 2019 | 35,524 |
| Nebraska | Nebraska City | City Administrator | 2022 | 7,200 |
| Nevada | Boulder City | City Manager | 2021 | 16,207 |
| New Hampshire | Portsmouth | City Manager | 2019 | 21,796 |
| New York | Long Beach | Deputy City Manager (Virtual) | 2022 | 33,275 |
| | Mamaroneck (Town) | Town Administrator | 2021 | 29,156 |
| | New Rochelle | City Manager | 2022 | 79,067 |
| | Scarsdale | Village Manager | 2021 | 17,837 |
| North Carolina | Albemarle | City Manager | 2024 | 16,404 |
| | Ayden | Town Manager | 2023 | 5,000 |
| | Fayetteville | Assistant City Manager | 2022 | 210,000 |
| North Dakota | Minot | Assistant City Manager | 2023 | 45,700 |
| | Minot | City Manager | 2020 | 45,700 |
| Pennsylvania | Ferguson Township | Township Manager | 2022 | 18,300 |
| | Patton Township | Township Manager | 2022 | 15,801 |
| Tennessee | Oak Ridge | City Manager | 2023 | 31,402 |
| Texas | Austin | Assistant City Manager | 2021 | 885,000 |
| | McKinney | Assistant City Manager | 2019 | 191,645 |
| | Missouri City | Assistant City Manager | 2019 | 74,139 |

| | | | | |
|---|---|---|---|---|
| | Missouri City | City Manager | 2022 | 74,[illegible] |
| Vermont | Winooski | City Manager | 2022 | 7,997 |
| Virginia | Chesapeake | City Manager | 2019 | 245,000 |
| | Hampton | Assistant City Manager | 2024 | 137,436 |
| | Newport News | City Manager | 2023 | 181,958 |
| | Portsmouth | City Manager | 2020 | 96,000 |
| | Salem | City Manager | 2019 | 25,643 |
| | Virginia Beach | City Manager | 2019 | 442,707 |
| Washington | Burien | City Manager | 2022 | 52,066 |
| | Duvall | City Administrator (Professional Outreach) | 2021 | 8,090 |
| | Yakima | Assistant City Manager | 2021 | 97,000 |
| West Virginia | Bridgeport | City Manager | 2019 | 8,582 |
| | Bridgeport | City Manager | 2021 | 8,582 |
| Wisconsin | Baraboo | City Administrator | 2019 | 12,048 |
| | Bayside | Assistant Village Manager | 2019 | 4,400 |
| | Beaver Dam | City Administrator | 2021 | 16,291 |
| | Beloit (Town) | Town Administrator | 2020 | 7,083 |
| | Franklin | Director of Administration | 2019 | 36,155 |
| | Harrison | Village Manager | 2021 | 13,185 |
| | Marshfield | Assistant City Administrator/Community Development Director | 2023 | 18,929 |
| | Monroe | City Administrator | 2020 | 10,827 |
| | Oak Creek | Assistant City Administrator/Comptroller | 2020 | 35,243 |
| | Plymouth | City Administrator/Utilities Manager | 2020 | 8,540 |
| | Port Washington | Assistant City Administrator/Human Resources Director | 2022 | 11,250 |
| | Sheboygan | City Administrator | 2023 | 48,327 |
| | Waukesha | City Administrator | 2023 | 71,158 |
| | Whitewater | City Manager | 2022 | 14,300 |
| | | | | |

Public Administration Associates, LLC

**Proposal to Provide Executive Search Services**
**(City Administrator) to the City of DePere**

Public Administration Associates

**Public Administration Associates**
1155 W. South Street
Whitewater, WI 53190
**262.903.9509**
www.public-administration.com
kevin.brunner1013@gmail.com

April 19, 2024

Mr. James Boyd, Mayor
City of De Pere
335 S. Broadway
DePere, WI 54115

Dear Mayor Boyd,

I am herewith submitting a proposal to assist the City of De Pere in the recruitment/selection of the community's next City Administrator. Since 1998, Public Administration Associates (PAA) has worked with over 200 different Wisconsin municipalities on the recruitment/selection of their chief administrative officers and we would be quite honored and privileged to work with the Mayor, City Council and City Staff on this very important work. In the last couple of years, we have assisted many communities in northeastern Wisconsin in their searches for chief administrative officers including Algoma, Bellevue, Grand Chute, Greenville, Kewaunee, Lawrence, Little Chute and Suamico so we are very familiar with and attuned to northeastern Wisconsin's municipal job market dynamics. We have also successfully completed many recent city administrator searches for communities similar in size and complexity to De Pere including Cudahy, Hudson, Lake Elmo (MN), Middleton, Monroe, Glendale, Portage and Platteville. Because of these particular executive searches coupled with the many more that we conduct annually across Wisconsin and Midwest, we are aware of many well qualified candidates that we would actively recruit for the De Pere position.

To date, PAA has conducted over 400 Wisconsin municipal executive searches. What follows is information about our company and the value-added assistance that we would bring to the City of DePere. Please feel free to visit our website at www.public-administration.com.

Please call if I can answer any questions or concerns you may have regarding this proposal. I would be also more than willing to present this proposal to your City Council and/or Selection Committee if requested.

Thank you for your consideration.

Sincerely,

*Kevin M. Brunner*

Kevin M. Brunner, President

Public Administration Associates

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# 1. About Public Administration Associates

SINCE 1998

Taking Local Government to New Heights...

**Public Administration Associates, LLC (PAA)** is recognized among the most trusted, skilled and effective local government consultants in Wisconsin and the Midwest. Our consultants are highly skilled practitioners who get the job done through unparalleled commitment to public service, the highest standards of service to its clients and the efficient use of client time and resources. PAA has built a sterling reputation earned from 25 plus years of municipal consulting and a combined 400+ years of public management experience.

## Celebrating 25 Years of Municipal Consulting in Wisconsin

PAA was organized in April 1998 by partners William Frueh, Denise Frueh, and Dr. Stephen Hintz. Kevin Brunner is now President of PAA and the Fruehs and Hintz are PAA Associates along with approximately fifteen other local government professionals who are affiliated with PAA and work on a project-to-project basis. In 2020, Kevin Brunner was joined by David Bretl and Christopher Swartz as partners of the firm. Brunner currently serves as the firm's president while Bretl serves as vice-president and Swartz as its secretary/treasurer.

## Kevin Brunner

President/Partner

Kevin Brunner has over forty years of experience in serving Wisconsin local governments. He served as the manager/administrator in Saukville, Monona, De Pere, and Whitewater and worked as an assistant administrator for the City of Appleton and Kenosha County. He retired from public service as the Director of Central Services/Public Works for Walworth County. Brunner was the recipient of the 2007 Wisconsin City/County Manager of the Year and 2012 Service Innovation awards, both from the Wisconsin City/County Management Association (WCMA). Brunner is a past president of the WCMA and served on the League of Wisconsin Municipalities and Alliance of Cities Boards of Directors. He received his BA in Political Science and Criminal Justice from Carthage College (Magna Cum Laude and Rhodes Scholar Nominee); MPA from Michigan State University and is a graduate of the University of Virginia Senior Executive Institute. He achieved credentialed manager (ICMA-CM) status from the International City/County Management Association during his city management career. He has served on numerous public and non-profit boards and is currently chair of the Geneva Lake Conservancy. Brunner has been actively consulting since 2014.

## David Bretl

Vice President/Partner

David Bretl has served local governments in Wisconsin for the past twenty-nine years. He retired in early 2020 from his position as County Administrator and Corporation Counsel for Walworth County, a combined position that he held since 2003. He has joined PAA as a partner in January 2020 but has been working as a consultant with the firm since 2018. During his eighteen years at Walworth County, Dave was involved in the two board downsizings, the replacement of most of the County's facilities and the consolidation of six departments. Dave has moderated the county's Intergovernmental Cooperation Council (a collaborative effort among municipal, county and town governments) since 2008 and serves as an advisor to Leadership Walworth, a program designed to develop public, non-profit, and private sector leaders. In 2005 he helped organize a county-wide private-public economic development initiative, WCEDA (Walworth County Economic Development Alliance, Inc.). In 2015 that organization honored him by establishing the Dave Bretl Community Betterment Award.

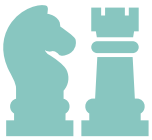
## Chris Swartz

Secretary-Treasurer/Partner

Chris Swartz has served as a municipal manager in Wisconsin for over 30 years, most recently as Village Manager for the Village of Shorewood (2004-2017), Administrator for the Village of Sussex (1990-2004) and Clerk-Treasurer Administrative Coordinator Village of East Troy (1986-1990). He started his career as a researcher for the Citizens Governmental Research Bureau/Public Policy Forum (1983-1985). He retired from Shorewood in 2017 as a credentialed manager as designated by the International City Management Association ICMA). Swartz has a Master of Science degree in Urban Affairs from the University of Wisconsin-Milwaukee (1983) and an undergraduate degree from University of Wisconsin-Stevens Point. Swartz has been recognized for his

innovative approach to economic development, strategic and financial planning, organizational development and intergovernmental cooperation. He is known as a mentor to emerging public administration leaders through his tenure as an adjunct professor within the Masters of Public Administration (MPA) graduate program at the University of Wisconsin-Milwaukee. Swartz has been formally recognized for his lifetime achievements, including Wisconsin City/County Management Association “Meritorious Service Award” (2015), James R. Ryan Lifetime Achievement Award from the Public Policy Forum (2017) and Wisconsin Economic Development Association Fredrick C. Pearce Lifetime Achievement award (2017).

# Comprehensive Government Consulting Services



**Executive Recruitment**

Assisting municipalities in the recruitment and selection of management personnel including managers, administrators and department/division heads.

**Interim Management Services**

Providing skilled and experienced administrators on a full-time or part-time basis for a limited period of time.

**Organization & Management Studies**

Analyzing municipal organizations, operations, and management structure and procedures using best practice standards. Specializing in organizational assessments, public works, and +public safety.

**Classification & Compensation Studies**

Analyzing and developing of classification and compensation plans using internal and external equity standards.

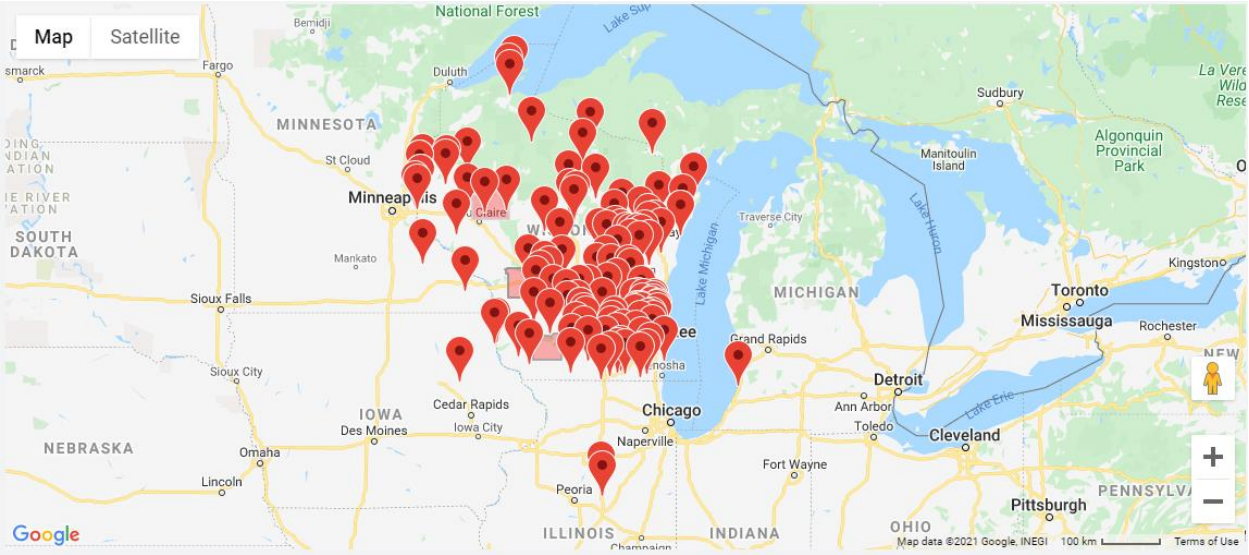
**Economic Development Services**

Assisting communities establish and implement economic development projects and programs, including downtown revitalization initiatives, redevelopment and tax incremental financing, business improvement district plans, brownfields initiatives, and business and industrial park planning and development.

**Strategic Planning & Implementation**

Performing community needs assessments, preparation of plans, strategies for implementation of community plans, site planning/development review assistance, and assisting communities in development of boundary agreements and cooperative plans.

# PAA Executive Recruitment Clients




## Over 400 Municipal Administrator Searches Since 1998

*The number beside the municipality name is the number of times PAA has assisted the municipality. State of Wisconsin unless otherwise noted. View the interactive map on our website for the work that we have performed for these communities.*

### Cities

Abbotsford (2)
Adams (2)
Algoma
Antigo (4)
Ashland (2)
Baraboo (3)
Berlin (2)
Brillion
Chilton (2)
Chippewa Falls (2)
Clintonville (2)
Columbus (5)
Crystal River, FL
Cudahy
Delavan (2)
DePere (3)
Durand (3)
Eagle River
El Paso, IL
Elkhorn
Elroy (3)
Evansville (3)
Fond du Lac
Fort Atkinson (2)
Fox Lake (3)
Franklin
Geneseo, IL
Glendale
Hartford
Hillsboro (3)
Horicon (2)
Hudson(3)
Independence, IA
Jefferson (5)
Kewaunee
Lake Elmo, MN
Lake Geneva (2)
Lake Mills
Lancaster (4)
Marinette (2)
Marquette, IA
Marshfield (2)
Mauston (3)
Menominee, MI
Menomonie (2)
Mequon
Menasha
Merrill
Middleton (2)
Milton (2)
Mineral Point
Minonk, IL (3)
Monona (3)
Monroe (3)
New Holstein
New Lisbon
New London (3)
Niagara
Oak Park Heights, MN
Oconto (2)
Omro (2)
Park Falls
Pine Island, MN
Platteville (5)
Prairie du Chien (2)
Princeton (2)
Portage
Port Washington (2)
Racine
Reedsburg (2)
Rhinelander
Rice Lake
Richland Center
Ripon (2)
Shawano (5)
South Haven, MI
St. Croix Falls
St. Francis
Sturgeon Bay (5)

Thorp
Tomah (2)
Verona (3)
Washburn (2)
Waukesha
Waupaca
Waupun (2)
Wautoma
Wauwatosa (2)
Weyauwega (3)
Whitewater (3)

## Villages

Ashwaubenon
Bayside (3)
Bellevue (2)
Belleville(3)
Black Earth
Bonduel
Brown Deer
Clinton (2)
Colfax
Cross Plains (2)
Darien
Deerfield
DeForest (2)
Denmark (2)
East Troy
Edgar
Egg Harbor (2)
Elkhart Lake
Elm Grove
Ephraim
Fox Point (2)
Germantown(2)
Grafton (2)
Greendale (2)
Greenville
Hales Corners
Hammond
Hartland (3)
Howard (3)
Johnson Creek (3)
Kewaskum
Little Chute (5)
Lodi (3)
Marathon City
Marshall (3)
Maple Bluff
McFarland (2)
Menomonee Falls
Merton
New Glarus (4)
North Fond du Lac (3)
Oregon (2)
Osceola (4)
Paddock Lake (2)
Palmyra
Pardeeville
Port Edwards
Poynette
Prairie du Sac
Pulaski
Rothschild (2)
Sherwood
Shorewood Hills (3)
Slinger (2)
Somerset
Spring Green
Suamico (3)
Stanley
Sussex
Thiensville (2)
Turtle Lake
Twin Lakes (2)
Union Grove (2)
Vernon
Waterford
Waunakee
W. Milwaukee (3)
Weston
Williams Bay (2)
Wind Point (4)
Winneconne (4)
Whitefish Bay (2)
Wrightstown (3)

## Towns

Algoma (4)
Beloit
Buchanan (5)
Cedarburg (2)
Clayton
Empire
Fox Crossing (Menasha) (4)
Gibraltar (2)
Grand Chute (4)
Greenville (2)
La Pointe (2)
Lawrence (2)
Ledgeview
Little Suamico
Linn
Lisbon
Oconto
Osceola
Rib Mountain
Richfield (2)
Sevastopol
Troy
Washington
Weston

## Counties

Ashland
Chippewa (3)
Dodge (2)
Door
Grant
Green Lake (2)
Kewaunee
Iowa
Monroe
Oconto (2)
Polk (3)
Price
Richland
Sauk
Sawyer
Shawano
Trempeleau
Wabasha, MN (2)
Washburn (2)
Waushara

# 2. PAA Consultants (Associates)

## Dr. Stephen Hintz - Associate

Associate Stephen Hintz served on the faculty of the University of Wisconsin Oshkosh from 1972 to 2001 where he taught personnel, budgeting, and municipal management in the Master of Public Administration program. For twenty years, he served as executive secretary of the Wisconsin City/County Management Association. Hintz holds a Ph.D. in political science from Yale University. He has been consulting with municipalities on recruitment and management issues since 1980. In 1998, Hintz was elected to the Oshkosh Common Council and was the Mayor of Oshkosh from 2002 to 2004. In 2001, he received the prestigious Sweeney Academic Award from the International City/County Management Association for his lifelong work in promoting public administration.

Dr. Hintz works on executive recruitment and general management studies for PAA.

## William Frueh – Associate

Associate William Frueh has served local and state governments since 1962, as a City Manager in Council Bluffs, Iowa; Newton, New Jersey; Shawnee, Oklahoma and retired in 1996 after 20 years as the city manager of Oshkosh, Wisconsin. He also served as the Director of Economic and Community Affairs for the State of Oklahoma. Oshkosh Citizens and the Oshkosh Northwestern newspaper named Frueh as one of the ten people in Oshkosh who most influenced the development of Oshkosh during the twentieth century. Frueh received his bachelor's degree in Civil Engineering from Iowa State University and has experience as a City Engineer and Public Works Director. He has been actively consulting since 1996 and is a Life Member of both the International City/County Management Association and WCMA.

Mr. Frueh works on executive recruitment and public works-related management studies for PAA.

## Denise Frueh - Business Manager/Associate

Denise Frueh received both her bachelor's and master's degrees in Business Administration from the University of Wisconsin. She has over 20 years of experience in serving municipal governments, as Deputy Assessor for the City of Oshkosh, WI and as a consultant to local governments. In addition to serving as the business manager for Public Administration Associates, she has been actively consulting since 1996 on numerous executive searches and administrative studies for Midwest municipalities in Wisconsin, Illinois, Minnesota and Iowa.

## Dave Tebo – Associate

Dave Tebo served as a Municipal Administrator in Wisconsin for 25 years, most recently in the Village of Poynette (1994-2000) and Town of Greenville (2000-2017). Tebo has a master's degree in Public Affairs & Administration from UW-Madison and a bachelor's in Urban & Regional Studies from UW-Oshkosh. Dave is a Credentialed Manager (CM) by the International City Management Association (ICMA) and Certified Public Manager (CPM) by the State of Wisconsin. He is experienced in all local government management duties including: budgeting, financial analysis, human resources, community development, planning and economic development. Project areas Dave had in-depth experience and success with in Greenville include: Land Use Planning, Sustainability, Land Stewardship (Creation of Two DATCP recognized Agricultural Enterprise Areas), Grant writing for Trail Construction and Administration ($3 million in trail projects over the last 15 years), and Economic Development (TID Development and work with Fox Cities Regional Partnership). Tebo's work in Greenville was featured in the book The New Public Service-Serving, Not Steering by Janet and Robert Denhardt in 2007.

Mr. Tebo works on interim management assignments, executive recruitment and classification/compensation studies for PAA.

## Duane Gau – Associate

Duane Gau has over thirty years of experience in Wisconsin local government. He has worked on cooperative agreements, boundary agreements, TID management, personnel management, recruitment, public works/utilities and finance. In 2001, as Village Administrator, he assisted in a merger of a Village and Township to create a new governmental entity. Gau provided organizational analysis and salary studies for the Villages of Holman and Cross Plains and has served as interim administrator for the Villages of Mount Horeb, Holmen, Maine, Brokaw, Town of Texas and interim Public Works/Utilities Director for Ripon Wisconsin. Duane has a bachelor's degree in Business Management from Cardinal Stritch University in Milwaukee and an associate's Degree in Civil Engineering from Madison College Technical College. He is member of WCMA.

Mr. Gau works on interim management assignments, executive recruitment and management studies for PAA.

## Sue McDade – Associate

Sue McDade has over 30 years of experience as a local government recreation and facilities administrator. She is currently the Community Services Director in Waunakee, Wisconsin, a fast-growing north Madison suburb. Responsibilities include recreational programming, supervision of the community center (including a fitness center, gymnasium, community room and senior center), and development of the park system, currently consisting of over 200 acres of park land. Mc Dade obtained a master's degree in Recreation and Park Administration from Penn State University. She is a past president of the Wisconsin Park and Recreation Association (WPRA), serving from 2014-2016. She is the recipient of numerous Wisconsin and regional honors and awards, including the prestigious WPRA Professional Award of Merit in 2010. McDade teaches courses in the Recreation Management Program at Madison Area Technical College.

Ms. McDade works on executive recruitment and park and recreation-related management studies for PAA.

## Anthony Brown – Associate

Anthony Brown is the current City Administrator for the City of Waukesha, WI. Anthony has over a decade worth of experience serving Wisconsin local governments. He has served in different municipal management capacities in southeast Wisconsin and the Fox Valley. Mr. Brown is recognized as a functional, hands-on servant leader, who believes in empowering employees to become leaders. He is experienced in all local government management duties including budgeting, financial management, human resources, community and economic development, strategic planning, and performance management. Anthony has a master's degree in Public Administration with an emphasis on municipal management and a Bachelor of Arts in Political Science with an emphasis on law studies from the University of Wisconsin-Milwaukee. In addition, Anthony has sought additional educational opportunities by graduating from the Government Finance Officers Association (GFOA) Budget Academy, obtaining his Lean Six Sigma Yellow and Green Belt Certification, and getting accredited through the Congress for New Urbanism (CNU).

Mr. Brown works on executive search and general consulting projects for PAA.

## Timothy Franz – Associate

Timothy Franz is the retired fire chief of the Oshkosh Fire Department and has been in the fire service for over 30 years. Franz has an associate's degree in fire protection from Fox Valley Technical College and a bachelor's degree in fire science from the University of Cincinnati. He also is a graduate of the National Fire Academy Executive Fire Officer Program. Franz is a past president of the Wisconsin State Fire Chiefs' Association and has served as a consultant on various fire and emergency management studies. Recently, he has worked on the Fire/EMS studies for Verona, Sevastopol, Door County, Buchanan, five Oconto County Townships, Little Chute, Platteville, Sturgeon Bay and Park Falls with PAA.

Mr. Franz works on Fire/EMS-related studies and Fire Chief executive search projects as well as Fire/EMS compliance audits for PAA.

## James Austad – Associate

James Austad is an instructor in the Fire Protection Program at Fox Valley Technical College. He is a 28-year veteran of the fire service, spending 22 years with the Oshkosh Fire Department. He was the battalion chief in charge of the emergency medical services division of the Oshkosh Fire Department. Austad received an associate's degree in fire protection from Fox Valley Technical College, a bachelor's degree in business management from Silver Lake College, and a master's degree in public administration from the University of Wisconsin Oshkosh. He also is a graduate of the National Fire Academy Executive Officer Program. Austad has recently worked on the PAA Fire/EMS Studies for Sevastopol, Door County, Buchanan, Oconto Township, Sturgeon Bay, Little Chute, Platteville and Park Falls.

Mr. Austad works on Fire/EMS-related studies and Fire Chief executive search projects as well as Fire/EMS compliance audits for PAA.

## Darrell Hofland – Associate

Darrell Hofland has 35 years of municipal management experience in Wisconsin, most recently as City Administrator for Sheboygan (2016-2020), Village Administrator for Grafton (1990-2016), Village Administrator for Little Chute (1986-1990), and Administrative Assistant to the Mayor for Appleton (1985-1986). Mr. Hofland was the first recipient of the Meritorious Service Award in 2000 by the Wisconsin City/County Management Association and Wisconsin's first Credentialed Manager by the International City/County Management Association. He is experienced in all local government management duties including budgeting, financial management, human resources, community and economic development, strategic planning, and performance management. His academic credentials include attainment of a Master's Degree in Public Administration from American University with a concentration in Financial Management and a Bachelor of Arts Degree in Political Science and Psychology from University of Iowa. He is also a graduate of the Senior Executive Institute of the University of Virginia's Weldon Cooper Center for Public Service.

Mr. Hofland works on executive recruitment, interim management assignments and municipal strategic planning projects for PAA.

## Dr. Mamadou Coulibaly - Associate

Associate Dr. Mamadou Coulibaly is a specialist in the application of Geographic Information Systems (GIS). Coulibaly is an Associate Professor of Geography at the University of Wisconsin-Oshkosh where he teaches and conducts research on information processing, data analysis, mapping, and solutions to environmental and socioeconomic problems. He received his Ph.D. from the Southern Illinois University at Carbondale in 2004. Coulibaly has worked on mapping for PAA on several Fire/EMS Studies including Cottage Grove, Jackson, Lake Geneva, Little Chute, Lodi, Platteville and Park Falls.

Dr. Coulibaly works on a wide variety of management studies for PAA.

## Steve Kubacki – Associate

Steve Kubacki has nearly 40 years of Municipal Government experience in the State of Wisconsin beginning with the City of Janesville as an Environmental Technician, Assistant Director of Public Works and Street Superintendent. He has since served as an Administrator for the City of Brillion, Villages of Germantown, Ashwaubenon and Suamico and Chippewa County. He has extensive experience and knowledge in economic and community development working to create, plan, administer and manage extremely successful TIF districts in Suamico, Germantown and Ashwaubenon, including the TIF district that now encompasses the “Titletown” Development District that surrounds Lambeau Field. Steve retired from the Village of Suamico in May of 2019 and has worked on a number of projects for PAA for the cities of Park Falls and Marinette as well as the Village of Bellevue and Town of Little Suamico. He is a graduate of UW- Stevens Point with a BS in Resource Management and has completed graduate level coursework at both UW-Whitewater and Oshkosh in Public Administration and Urban/Regional Planning.

Mr. Kubacki works on interim management assignments and public works-related management studies for PAA.

## Bruce Stelzner – Associate

Bruce Stelzner has over 30 years of experience in Wisconsin local government. Stelzner has served as a County Highway Commissioner, Public Works Superintendent and Business Park Administrator. His responsibilities have included administration, management, design, and construction of public works/ utilities; highways and bridges; public infrastructure, personnel management, asset management, fleet management, building and grounds management. Stelzner has served as the State Director for the National Association of County Engineers and President of the Wisconsin County Highway Association. Stelzner has served as the Chairman, Co-Chair or member of many national, State, and Local committees including the NACo Transportation Steering Committee, FHWA State Transportation Innovation Council, Wisconsin Regional Planning/MPO, Wisconsin Local Roads and Streets Council and many other boards and commissions.

Mr. Stelzner works on interim management assignments and public works-related management studies for PAA.

## Jon Hochkammmer – Associate

Jon Hochkammer has over forty years of public sector experience in Wisconsin. He retired in 2021 from his twenty-one-year employment with the Wisconsin Counties Association (WCA). While employed with the WCA, Jon served as Director of Insurance Operations, Legislative Director and Outreach Manager. He was elected Wisconsin State Senate Sergeant-at-Arms in 1994 and held that position for eight years during which he also served as President of the National Association of Legislative Services and Security Association. Jon gained extensive first-hand experience working at the local, state and federal level through these employment opportunities. Jon has twenty-nine years of local elected experience. He was elected to the Manitowoc County Board of Supervisors in 1984. He served for eight years including serving as its board chairperson/administrative coordinator. He was elected to the Verona City Council in 1997 including serving as Mayor from 2006 - 2018. Jon was President of the Dane County Cities and Villages Association from 2007 - 2018. Jon is a member of the Leadership Wisconsin Board of Directors. He is President of the Friends of the Dane County Bookmobile Board and chairs the Dane County Area Agency on Aging Access Committee. Prior service with Dane County includes the following boards: Area Agency on Aging Board (Chair), Specialized Transportation Commission, Human Services Board, and Library Board (Chair). Additionally, he was Fitch-Rona EMS Commission Treasurer, Verona Fire

District President, Newton Fire Department President and 1st Assistant Chief, and on the Madison Family Medicine Residency Board

Mr. Hochkammer works on interim management assignments and county-related organization and operations studies for PAA.

## Shawn Murphy – Associate

Shawn Murphy has held positions in state and local government for over 30 years with 26 years' experience as a Municipal Administrator. After obtaining his Bachelor Degree in Business Administration from the University of Wisconsin-Eau Claire in 1986 and Master's Degree in Public Administration from the University of Wisconsin-Milwaukee in 1990, Murphy began his career as a Budget & Program Coordinator for the Wisconsin Department of Transportation. Murphy served as Assistant Village Manager in Whitefish Bay from 1992-1997; Village Administrator in Prairie du Sac from 1997 to 2007; City Administrator in Verona from 2007 to 2010 and City Administrator in Portage from 2012 to 2023. Murphy has a strong track record of collaboration and was involved in the formation of the North Shore Fire Department, the reformation of a joint Police Department between Prairie du Sac and Sauk City; worked closely with the Sauk Prairie School District to create the Sauk Prairie Recreation Commission that includes 6 municipalities and was involved in the creation of a joint municipal court commission that includes 4 municipalities. Murphy was an active member of the Wisconsin City/County Managers Association (WCMA) and the International City Manager's Association serving on numerous committees. In 2023 Murphy received a lifetime achievement award from the WCMA.

Mr. Murphy works on interim management assignments and executive recruitment projects for PAA.

# 3. PAA's Approach to Executive Recruitment

**Our primary objectives are (1) to attract the highest number of professionally qualified, experienced and diverse applicants and (2) to facilitate a selection process that is thorough, professional and timely, resulting in the selection of the candidate who best meets the requirements of the City.**

We believe that the Mayor and full City Council should be actively involved in the selection process at all stages of the process and that our primary role is to provide progressively more information about candidates to assist the Mayor and City Council in selecting semi-finalists, finalists, and the final choice. While we certainly review applicants very carefully, it is not our role to select candidates.

We believe that the process consists both of recruiting—the City officials involved will be actively selling themselves to potential candidates—and selecting—the Mayor and City Council carefully reviewing applicants for the best possible choice. Too often municipalities only consider the selection part.

We believe that the De Pere city staff has a large stake in the process. We recommend that department heads and other staff have an opportunity to meet and talk with each of the finalists. However, we fully recognize that the final decision rests with the governing body.

Finally, we believe that the process should be conducted in a planned, deliberate, and timely fashion. Specific preferences of the City should be accommodated in the design of the process, not as the process unfolds.

# 4. Our Proposed Process for De Pere

The following is our 12-step process that describes the scope of activities to be performed by Public Administration Associates, LLC during a typical municipal executive recruitment and selection process. We can readily adapt the process that we utilize to a schedule as may be requested by the City.

**PAA President Kevin Brunner and PAA Associate Sue McDade, will be the consultants on the De Pere recruitment/selection project and Brunner will be the project leader. This team has worked on a large number of recent municipal chief executive searches throughout Wisconsin (most recently for Baraboo, Belleville, Columbus, Deerfield, DeForest, Hudson, Milton, Monroe, Platteville and Shorewood Hills) and collectively have worked on over 150 successful municipal administrator search projects.**

# Activities to be Performed for De Pere by PAA Consultants

**1. Meet with the Mayor, City Council and City Staff** as appropriate to discuss the characteristics desired in the next De Pere City Administrator and the process of recruitment; review the City Administrator ordinance and job description and prepare needed revisions; prepare the position description; determine recruitment procedures and the interview and selection process, and determine the optimal time schedule for the City of De Pere;

*These meetings are important to establish the qualifications and qualities that the City wants in its next City Administrator and to determine the recruitment procedures and schedule.*

**2. Place advertisements in appropriate publications and on-line sources**, including the International City/County Management Association (ICMA), Illinois City/County Management Association (ILCMA), League of Wisconsin Municipalities, Wisconsin City/County Management Association (WCMA), Government Finance Officers Association (GFOA); Iowa Municipal League, Minnesota League of Cities; Strategic Government Resources (SGR), Local Government Hispanic Network, Black Public Administrators Association, universities with nationally recognized public administration programs (city management) including the University of Kansas, Northern Illinois University, University of Minnesota, Mankato State University, Syracuse University and Brigham Young University; also contact and encourage personally known qualified individuals to apply;

*ICMA, ILCMA, WCMA, Strategic Government Resources and the League of Wisconsin Municipalities are the premier channels for reaching qualified applicants for the De Pere City Administrator position in our opinion. All told, we will post the De Pere position on over 50 on-line governmental and university job sites.*

**3. Produce a two-minute video with the City to promote the position via social media (primarily YouTube and LinkedIn) to prospective applicants.** PAA will assist in writing the script for the video and the City will assist in providing readily available still photography and/or video content of the City. Mayor Boyd will also be videotaped as part of this video to promote the position. Here are two links to recent video job announcements (for the Cities of Monroe and Platteville respectively) we distribute via social media as examples.

**Monroe City Administrator**
**https://youtu.be/Rm3trHWgyrE**

**Platteville City Manager**
**https://youtu.be/yhbnWgRo9kw**

PAA will also produce a digital De Pere City Administrator Position Profile that will be used in the direct marketing of the position to targeted candidates identified by PAA and the City. Here are links to two recent PAA Position Profiles developed for Middleton and DeForest respectively. DeForest: https://public-administration.com/wp-content/uploads/2022/07/DeForest-Community-Development-Director-Position-Profile-Org-Chart.pdf
Middleton: https://public-administration.com/wp-content/uploads/2023/06/Middleton-City-Administrator-Position-Profile-1221-1-2.pdf

**4. Receive applications and acknowledge receipt.** We will download all application materials onto a Google Drive file and will share that with the City Clerk so that a full and complete record of all submitted information is fully maintained for municipal recordkeeping and open records purposes.

**5. Review applications and provide a "Mini-Resume" Candidates Report to the Mayor and City Council** that will include a rating of the candidates as "qualified", "unqualified" and "wild card" (these candidates may not strictly meet the qualifications but may have skills or work experience that may warrant continued consideration as candidates for the City Administrator position).

**6. Review applications with the Mayor and City Council for the selection of semi-finalists** (typically there will be between six and ten candidates who would continue as semi-finalists).

**7. Contact semi-finalists designated by the Mayor and City Council**; conduct background and reference checks; prepare semi-finalist candidate profile statements (see attachment for an example of the detailed 4–5-page reference report that we produce on each candidate at this stage); provide material to the Mayor and City Council.

***This is the most important and time-consuming part of the search process. Semi-finalists must supply references that are from elected officials and staff superiors, peers, and subordinates with whom the applicant has worked. If references are not appropriate,***

***semi-finalists must supply additional references. Questions are asked about accomplishments, strengths, skills, interpersonal relationships, and needed areas of improvement. This information is critical in evaluating the candidates and preparing the candidate profile statements. Semi-finalists will prepare electronic video interview presentations for the Mayor and City Council to review. If desired as an alternative, telephone or video conference interview can be arranged.***

**8. Review semi-finalists with the Mayor and City Council for selection of candidates to be interviewed on site in De Pere.**

*The Mayor and City Council review the resumes, the reports developed from the reference/background information and the electronic presentations. It then selects candidates as finalists to be interviewed. At this stage, all the candidates should be technically qualified to be De Pere's next City Administrator. The primary value of the interview is to determine the "fit" with the Mayor, City Council, City staff and the De Pere community.*

**9. Work with the De Pere Human Resources to arrange interviews and the on-site candidate assessment center in De Pere.**

**10. Assist in the interview process**, including arranging the schedule, coordinating plans with candidates, providing sample interview questions, conducting a writing exercise, observing the interviews, facilitating the selection of the first choice, and seeing that the interviews run smoothly.

*While there are a variety of approaches to the interview process, PAA normally recommends a two-day "assessment center" type process. On the first day, all the finalists on individual schedules tour De Pere and meet with the city leadership team (typically department heads) and appropriate department staff. Although the department staff members do not participate in the final selection of the City Administrator, each of them is asked to comment on the candidates as further evidence for the Mayor and City Council to consider. These meetings are important for both the candidates and the staff and City officials. Other activities for the Mayor and City Council to consider are a community reception or meet and greet for the candidates, an in-basket exercise, a leaderless group discussion, an emotional intelligence assessment and a psychological review.*

*On the second day, the Mayor and full City Council interview each candidate for approximately one hour. In addition, each candidate participates in a writing exercise to determine writing skills. The actual interview day(s) are scheduled at the convenience of the Mayor and City Council members.*

There are other approaches to the interview process. PAA will work with the Mayor, City Council and HR Staff to determine the process that is most suitable for De Pere.

**11. Draft the recommended City Administrator employment agreement and provide assistance in the negotiation of an employment agreement.**

*Normally, PAA receives instructions from the Mayor and City Council and negotiates an employment agreement for review and approval by the City Council at its next meeting or at a special meeting. However, we are prepared to work with the Mayor, City Council and De Pere HR Staff in any capacity in negotiating an employment agreement with the selected candidate. It is also imperative that the De Pere City Attorney approve as to form the employment agreement that will be negotiated with the chosen candidate. While PAA has drafted many city administrator employment agreements, the final document to be negotiated must have the full review/approval of the City Attorney.*

**12. Prepare letters for Mayor Boyd's signature thanking all applicants and notifying them of the result.**

# 5. Project Costs for De Pere/Insurance

We strive to make our costs affordable to the municipal clients that we serve. We know that in Wisconsin, with local government levy limits and expenditure restraints, that municipalities must be ever cost-conscious.

Total Cost (Including all Direct Marketing Costs Estimated at Between $2,200 and $2,500 and $2,200 for the De Pere Posting and Direct Consultant Expenses Estimated at Between $800 and $1,100)-$16,900.

Not included in our lump sum amount are any aptitude/psychological tests, emotional intelligence assessments; post-offer background checks and/or interview visits to the candidate's community of residence if desired or requested. If requested by the City, PAA will facilitate this work and just pass-through these costs to the City (PAA does not apply any mark-up to them).

PAA will bill the City for one-third of the quoted lump sum amount at the time of execution of the executive services contract with PAA; one-third at the mid-point in the search process (selection of semi-finalists) and will bill the remainder of any other costs incurred on behalf of

the City after the new City Administrator's employment agreement has been approved by the De Pere City Council.

PAA carries professional liability insurance with limits of $1,000,000 per occurrence/$1,000,000 aggregate. We can provide a certificate of insurance to the City of De Pere upon request.

# 6. De Pere Recruitment/Selection Schedule

Typically, a municipal management search of this type will take approximately 16 weeks from start to when the new city administrator begins his or her new duties, however, PAA will work closely with City officials to maintain a schedule that will get a new administrator on board as soon as what the City desires. Early in the recruitment phase of the search process, we would like to discuss the full search schedule and what the most effective and efficient transition between retiring Administrator Delo and his selected successor should be.

| WEEKS | 1-4 | 5-8 | 9-12 | 12-16 |
|---|---|---|---|---|
| **Project Discovery/City Administrator Qualification & Qualities Discernment** | | | | |
| **Ad Placement, Video Production, Position Announcement** | | | | |
| **Application Reception** | | | | |
| **Application Review, Assessment, Presentation** | | | | |

| | | | | |
|---|---|---|---|---|
| **Contact Semi-finalists** | | | | |
| **Review Semi-finalists** | | | | |
| **City Administrator Candidate Assessment Center/Interviews** | | | | |
| **Negotiations with Selected Candidate** | | | | |
| **New City Administrator on Board in De Pere** | | | | |

# 7. Our Commitment to De Pere

Public Administration Associates, LLC will commit whatever time and effort is necessary to fully and successfully complete all tasks described in this proposal.

**Public Administration Associates, LLC provides the following guarantees**:

- If the initial search is not successful, PAA will conduct an additional search until the De Pere City Administrator position is filled. If additional marketing costs are incurred by PAA for any additional searches for this position, only these direct marketing costs and not any additional PAA consulting costs will be charged to De Pere.
- If the candidate selected either resigns or is terminated for cause within the first twelve months of employment, PAA will conduct a new search and waive its consultation fee. We have had to only honor this guarantee four times for the 400+ municipal executive searches that we have conducted over the past 26 years (that is a success rate of over 99%!). As such, we are very confident in our recruitment/selection processes that we employ.

# 8. PAA References-Recent Wisconsin Local Government Executive Searches

Quotes from two of our most recent municipal clients:

“PAA consultants exceeded our expectations in every area of recruiting and hiring our new city administrator. They were invested in creating an inclusive and successful process for our staff, community, and the candidates. Their high degree of professionalism, knowledge, and communication skills were demonstrated throughout the project. We could not be more pleased. There is no hesitation in recommending them to any community.”

**Mayor Anissa Welch, City of Milton**

"Thanks to Public Administration Associates, LLC, we were able to secure both an interim administrator who seamlessly guided us through a transitional phase and a permanent administrator who has already brought a fresh perspective and dynamic leadership to our organization. Their dedication to excellence and their unwavering support were integral to this successful outcome.

Without hesitation, I highly recommend Public Administration Associates, LLC to any organization seeking unparalleled professionalism, expertise, and results in their administrative recruitment endeavors. Their commitment to identifying the right talent is truly commendable, and their contributions have had a lasting positive impact on our organization."

**President Chris Campbell, Village of Marshall**

## PAA Municipal Executive Search References

**Jack Anderson,** Village President, Village of Greenville, Phone 920-757-5181 (C)

**Michael Bablick**, Former Mayor, City of Park Falls, Phone 715-661-3025 (C)

**Marty Becker**, Former Mayor, City of Port Washington, Phone 262-707-1464 (C)

**Mason Becker**, Former City Council President, City of Fort Atkinson, Phone 920-723-4924 (C)

**David Benforado**, Former Village President, Village of Shorewood Hills, Phone 608-535-2960

**Gurdip Brar**, Former Mayor, City of Middleton, Phone 608-821-8359 (C)

**Marty Brewer**, Chair, Richland County Board of Superviors,608-383-0207 (H)

**Chris Campbell**, Village President, Village of Marshall, Phone 608-655-4017 (O)

**Glenn Carlson**, Town of LaPointe (Madeline Island), Phone 715-747-6654 (O)

**Jeanne Carpenter**, Former Village President, Village of Oregon, Phone 608-358-7837 (C)

**Mitchel Craig**, Mayor, City of Portage, 608-697-7065

**Barbara Daus**, City Council President, City of Platteville, Phone 608-348-3365

**Donna Douglas**, Mayor, City of Monroe, Phone 608-214-8566(C)

**Dr. Bill Duncan**, Village President, Village of Williams Bay, Phone 262-245-2700 (C)

**Greg Frutinger**, Village President, Village of Deerfield, Phone 608-764-5505 (H)

**Russ Geise**, Chair, Town of Clayton, Phone 920-427-4126 (C)

**Steve Genisot**, Mayor, City of Marinette, Phone 906-399-8854 (C)

**Theodore Grant**, Mayor, City of Ripon, Phone 920-896-6900 (O)

**Joseph Hammer,** Mayor, City of Columbus, Phone 920-623-5900 (C)

**Tom Hartz**, Former Mayor, City of Lake Geneva, Phone 262-374-9127 (C)

**Brian Heckendorf**, President, Village of Jackson, 414-416-2234 (C)

**John Jarvis**, County Board Chair, Waushara County, 920-572-0029 (C)

**Diana Kaschinske**, President, Village of Poynette, 608-635-8960 (C)

**Dr. Bryan Kennedy**, Mayor, City of Glendale, 414-228-1700 (O)

**Randy Knaack**, Mayor, City of Menomonie, Phone 715-232-2369 (ext.100)

**Ben Krumenauer**, Administrator, Village of Bellevue, Phone 920-410-5563 (O)

**Bruce Lechner**, Mayor, City of Elkhorn, Phone 262-379-0890 (C)

**Tim McCumber**, County Board Chair, Sauk County, 608-963-6581 (C)

**Patrick Milliren**, Mayor, City of Durand, Phone 715-672-8770 (O)

**Wanda Montgomery**, President, Village of Brown Deer, Phone 262-502-1460 (O)

**Laura Nelson**, Former President, Village of Suamico, Phone 920-246-8212 (C)

**Rich O'Connor**, Mayor, City of Hudson, Phone 715-386-4765 (Ext. 120) (O)

**Joe Osterman**, Chair, Town of Lisbon, Wisconsin, Phone 262-246-6100 (Ext. 1200) (O)

**Thomas Pavlic,** Mayor, City of Cudahy, Phone 414-769-2222 (O)

**George Peterson**, President, Village of Rothschild, Phone 715-359-3660 (O)

**Deb Rose**, President, Village of Osceola, 715-294-2598 (H)

**Doug Rowen,** Chair, Town of Troy, Phone 715-808-1372 (C)

**Susan Sanabria,** Former President, Village of Wind Point, Phone 262-994-0733 (C)

**Kathy Schlieve**, Administrator, City of Waupun, Phone 920-324-5563 (O)

**Ryan Schroeder**, Mayor, City of Delavan, Phone 262-728-5585 ext. 113 (O)

**Daniel Shoemaker**, Mayor, City of Cumberland, Phone 952-270-1266 (C)

**Tweed Shuman**, County Board Chair, Sawyer County, Phone 701-330-6897 (C)

**Richard Snelson,** Mayor, City of New Holstein, 920-898-5766 (O)

**Steven Soukop**, President, Village of Bellevue, Phone 920-593-5508 (O)

**Dr. Lanny Tibaldo**, Chair, Town of Lawrence, Phone: 920-336-9131 (O)

**Roger Truttman,** President, Village of New Glarus, Phone 608-212-6785 (C)

**Greg Waters**, City Council President, City of Lake Mills, Phone 920-648-2344 (O)

**Anissa Welch**, Mayor, City of Milton, Phone 608-751-7198 (C)*

**Jane Cahill-Wolfgram**, President, Village of DeForest, Phone 608-438-5358 (C)

**Jim Weiss**, Chair, Town of Linn, Phone 262-245-2700 (C)

S. RENÉE NARLOCH
& ASSOCIATES
PROFESSIONAL EXECUTIVE RECRUITMENT

A PROPOSAL TO CONDUCT

# EXECUTIVE RECRUITMENT SERVICES

FOR

# CITY ADMINISTRATOR

ON BEHALF OF THE

# CITY OF DE PERE, WI

S. RENÉE NARLOCH, PRESIDENT
2910 Kerry Forest Pkwy D4-242, Tallahassee, FL 32309
P 850.391.0000
info@srnsearch.com

www.srnsearch.com

S. RENÉE NARLOCH & ASSOCIATES
PROFESSIONAL EXECUTIVE RECRUITMENT

April 22, 2024

Ms. Shannon Metzler, Human Resource Director
Ms. Tracy Hood, Human Resources Generalist
City of De Pere, WI
335 S. Broadway
De Pere, WI 54115

Dear Ms. Metzler and Ms. Hood:

We appreciate the opportunity to provide the City of De Pere with a proposal to conduct a search for the City Administrator position. Our proposal includes an overview of our qualifications and costs related to our services.

With respect to this recruitment for the City of De Pere, you should know:

- S. Renée Narloch & Associates has extensive experience conducting quality searches that place candidates ideally suited to clients' needs. S. Renée Narloch & Associates is incorporated in Florida and is a small, woman-owned business. For many years, Ms. Narloch, President, served as the Senior Vice President of Recruitment for a national public sector consulting firm, responsible for recruitments in 40+ states. Her career in public sector recruitment spans over 25 years, during which time she has participated in hundreds of public sector searches nationwide.

- S. Renée Narloch & Associates is currently conducting recruitments on behalf of City of Alpharetta, GA (Economic Development Director); Seminole County, FL (Utilities Director); City of St. Pete Beach, FL (City Manager); Town of Pembroke Park, FL (Town Manager); City of Port St. Lucie, FL (City Attorney); City of Cape Coral, FL (Public Works Director); City of Hollywood, FL (Wastewater Treatment Plant Manager); and Opportunity Home San Antonio, TX (Chief Operating Officer).

- Ms. S. Renée Narloch, President, has extensive experience conducting public sector executive recruitments throughout the nation, including more than 400 searches for clients such as the City of Oak Creek, WI (City Administrator); City of Washington, IL (City Administrator); City of Rye, NY (City Manager); City of Topeka, KS (City Manager); City of Virginia Beach, VA (City Manager; Assistant Human Services Director); City of Charlottesville, VA (City Manager); Town of Lake Lure, NC (Town Manager; Project Manager); Town of Landis, NC (Town Manager); City of Thomasville, GA (City Manager; Assistant City Manager; City Engineer); City of Coral Springs, FL (City Manager; Deputy City Managers (2); Director of Economic Development; Director of Financial Services); City of Fort Lauderdale, FL (City Manager; Assistant City Manager; City Attorney; Finance Director; Director of Sustainable Development; Deputy Director of Human Resources; Building Official); City of Tallahassee, FL (City Manager; Fire Chief; Airport Director; Director of

S. RENÉE NARLOCH & ASSOCIATES
PROFESSIONAL EXECUTIVE RECRUITMENT

Human Resources); Johnson County, KS (County Auditor; County Appraiser; Chief Legal Counsel); City of Dublin, OH (Director of Communications & Public Information); City of Arlington, TX (Assistant City Manager; Parks & Recreation Director); City of Baytown, TX (Assistant City Manager; City Attorney; Police Chief; Director of Public Affairs); City of Sugar Land, TX (Director of Budget & Strategy; Assistant Director of Finance); Leon County, FL (Building Official); City of Dunedin, FL (Community Development Director; Communications Director; City Manager; Finance Director; City Clerk); City of Dania Beach, FL (City Manager); City of Miami Beach, FL (City Manager); City of St. Cloud, FL (Police Chief; Human Resources & Risk Management Director; Information Technology Director; Environmental Utilities Director); City of Lake City, FL (City Manager); Palm Beach County, FL (County Administrator; Director of Capital Improvements); Person County, NC (County Manager); Cumberland County, NC (Assistant County Manager Community Services; Human Resources Director); and many others. Ms. Narloch will conduct the recruitment for the City Administrator for the City of De Pere. A sample of past clients is included in our proposal (Clients, Page 7).

- S. Renée Narloch & Associates has a highly trained staff, a vast network of contacts and professional affiliations in public sector management, and a proven recruitment process tailored to our client's needs, which will result in a quality pool of candidates.

Thank you for your consideration. Please do not hesitate to contact us at 850.391.0000 should you have questions or need additional information.

Sincerely,

S. Renée Narloch, President

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# ABOUT US

## Our Understanding of the Requested Services

S. Renée Narloch & Associates is highly qualified to assist the City of De Pere in recruiting a new City Administrator. We have extensive experience providing recruitment services, ranging from the initial contact with candidates to the successful hiring and placement of candidates.

We successfully manage all aspects of the recruitment process. We will work closely with the City to protect the integrity of the recruitment and ensure a successful outcome. The City can be assured that we will place a high priority on this recruitment, and our dedicated staff will provide their full attention throughout the entire process. Our recruiters have serviced hundreds of public sector clients, and we understand the importance of an objective and thorough process.

## Primary Contact

Ms. S. Renée Narloch, President, will conduct the City Administrator recruitment for the City of De Pere. Her contact information is as follows:

S. Renée Narloch, President
2910 Kerry Forest Pkwy D4-242
Tallahassee, FL 32309
P: 850.391.0000
Email: reneen@srnsearch.com
Website: www.srnsearch.com

## Our Firm History and Experience

S. Renée Narloch & Associates' recruiters are known throughout the industry as leading public sector recruiters by clients and candidates. We have a reputation for conducting quality searches that place candidates ideally suited to meet our client's needs. We pride ourselves on our responsiveness to clients and candidates, and we assure the City of De Pere that the highest caliber of service will be provided throughout the recruitment process.

S. Renée Narloch & Associates is a small, woman-owned business incorporated in the State of Florida. Ms. Narloch served as the Senior Vice President of Recruitment for a national public sector consulting firm for many years. Her career in public sector recruitment spans over 25 years, during which time she has participated in hundreds of public sector searches nationwide. In addition, our firm is comprised of individuals who are highly trained and experienced in the recruitment of public sector executives. The office of S. Renée Narloch & Associates is in Tallahassee, Florida.

S. Renée Narloch & Associates is currently conducting recruitments on behalf of City of Alpharetta, GA (Economic Development Director); Seminole County, FL (Utilities Director); City of St. Pete Beach, FL (City Manager); Town of Pembroke Park, FL (Town Manager); City of Port St. Lucie, FL (City Attorney); City of Cape Coral, FL (Public Works Director); City of Hollywood, FL (Wastewater Treatment Plant Manager); and Opportunity Home San Antonio, TX (Chief Operating Officer).

Ms. S. Renée Narloch, President, has extensive experience conducting public sector executive recruitments throughout the nation, including more than 400 searches for clients such as the City of Oak Creek, WI (City Administrator); City of Washington, IL (City Administrator); City of Rye, NY (City Manager); City of Topeka, KS (City Manager); City of Virginia Beach, VA (City Manager; Assistant Human Services Director); City of Charlottesville, VA (City Manager); Town of Lake Lure, NC (Town Manager; Project Manager); Town of Landis, NC (Town Manager); City of Thomasville, GA (City Manager; Assistant City Manager; City Engineer); City of Coral Springs, FL (City Manager; Deputy City Managers (2); Director of Economic Development; Director of Financial Services); City of Fort Lauderdale, FL (City Manager; Assistant City Manager; City Attorney; Finance Director; Director of Sustainable Development; Deputy Director of Human Resources; Building Official); City of Tallahassee, FL (City Manager; Fire Chief; Airport Director; Director of Human Resources); City of Arlington, TX (Assistant City Manager; Parks & Recreation Director); City of Baytown, TX (Assistant City Manager; City Attorney; Police Chief; Director of Public Affairs); City of Sugar Land, TX (Director of Budget & Strategy; Assistant Director of Finance); Leon County, FL (Building Official); City of Dunedin, FL (Community Development Director; Communications Director; City Manager; Finance Director; City Clerk); City of Dania Beach, FL (City Manager); City of Miami Beach, FL (City Manager); City of St. Cloud, FL (Police Chief; Human Resources & Risk Management Director; Information Technology Director; Environmental Utilities Director); City of Lake City, FL (City Manager); and many others. Ms. Narloch will conduct the recruitment for the City Administrator for the City of De Pere. She will be assisted by other senior staff members, as outlined in this proposal (The Team, Page 6). A sample of past clients is included in our proposal (Clients, Page 7).

We maintain a database of potential candidates, and our vast network of contacts and resources will be invaluable in identifying outstanding candidates, including those who may not be currently looking for opportunities. Our experience, proven recruitment process, expansive network of contacts, and knowledge of exceptional candidates will ensure the City of De Pere has a quality group of finalists from which to select the new City Administrator.

## Small Business/Minority Business

S. Renée Narloch & Associates is, by federal and state guidelines, considered a small, woman-owned business based on the size of our firm, our annual business earnings, and the percentage of ownership held (100%) by a woman/minority.

## Statement of Professional Standards

S. Renée Narloch & Associates believes in sound and ethical business practices. We understand that confidence and respect are imperative to our success. Our services to clients and candidates involve relationships that depend on good faith efforts. We conduct business forthrightly with no intentional misrepresentations that could mislead clients or candidates. We refrain from using sourcing techniques that involve deception or falsehood and do not engage in activities that violate antitrust laws. Communication between us, our clients, and our candidates is impartial and accurate. We make a concerted effort to see that the position, our clients, and candidates are represented honestly and factually. We honor the confidentiality of proprietary information received from clients and candidates and will disclose any knowledge of potential conflicts of interest to client agencies and candidates.

# OUR RECRUITMENT PROCESS

S. Renée Narloch & Associates' unique, client-driven approach to executive search will ensure that the City of De Pere has a pool of high-quality candidates from which to select the new City Administrator. Outlined below are the services we provide in our recruitment process.

## DEVELOPING THE CANDIDATE PROFILE

Our understanding of the City's requirements will be the foundation of a successful search. We will work directly with the Mayor, the Common Council, and others involved in the process to learn as much as possible about what the organization expects of a new City Administrator. We can also meet with other key staff or community members to gather information. We want to learn about the values and culture of the organization, as well as understand the current issues, challenges, and opportunities that face the City of De Pere. We also want to be fully acquainted with the City's expectations regarding the knowledge, skills, and abilities sought in the ideal candidate, and we will work with your organization to identify expectations regarding education and experience. Additionally, we want to discuss expectations regarding compensation and other items necessary to complete the successful appointment of the ideal candidate. As part of this process, we will evaluate the compensation and benefits of the City Administrator position. Based on these discussions, we will develop a profile addressing the responsibilities, core competencies and professional characteristics and traits, education and training, operational and organizational issues, and other relevant factors. The profile we develop together at this stage will guide our recruitment efforts.

## ADVERTISING CAMPAIGN AND RECRUITMENT BROCHURE

After gaining an understanding of the City's needs, we will design an effective advertising campaign that is appropriate for the recruitment. We will focus on professional journals specifically suited to the City Administrator search, such as the ICMA Newsletter, utilizing venues that will ensure a diverse pool of applicants, including qualified minority and women candidates. We will also utilize social media and will develop a professional recruitment brochure on the City's behalf that will discuss the community, organization, position, and compensation. Once completed, we will mail the brochure to an extensive audience, informing them of the exciting opportunity with the City of De Pere.

## RECRUITING CANDIDATES

After cross-referencing the ideal candidate's profile with our database of thousands of candidates and our contacts in the field, we will conduct an aggressive outreach effort that includes making personal calls to prospective applicants to identify and recruit outstanding candidates, including qualified minority and women candidates. We realize that the best candidate is often not looking for a new job, and this is the person that we actively pursue to become a candidate. Aggressively marketing the City Administrator position to prospective candidates will be essential to the success of the search.

## Screening Candidates

Following the recruitment closing date, we will screen all resumes and cover letters using the criteria established in our initial meetings to narrow the field of candidates.

## Preliminary Interviews

We will conduct preliminary interviews with the top 10 to 12 candidates to determine which candidates have the greatest potential to succeed in your organization. During the interviews, we will explore each candidate's background and experience regarding the City Administrator position. In addition, we will discuss the candidate's motivation for applying for the position and assess their knowledge, skills, and abilities. We will devote specific attention to determining the likelihood of the candidate's acceptance of the position if an offer of employment is made.

## Public Records Search

Following the interviews, we will review published articles that reference each candidate. Various sources will be consulted, including Lexis-Nexis™, a newspaper/magazine search engine, Google, and local papers from the communities in which the candidates have worked. This will bring to our attention any further detailed inquiries that we may need to make at this time.

## Recommendations

Based on the information gathered through meetings with your organization and preliminary interviews with candidates, we will typically recommend three to five candidates for your consideration. We will prepare a report on each candidate that focuses on the results of our interviews and public record searches, including detailed information about the candidate's professional experiences and accomplishments, strengths and potential gaps, and background information. We will make specific recommendations, but the final selection of those to be considered will be up to you.

## Final Interviews

Our years of experience will be invaluable as we help you develop an interview process that objectively assesses each candidate's qualifications. We will adopt an approach that fits your needs, whether it is a traditional interview, multiple interview panel, or assessment center process. We will provide you with suggested interview questions and rating forms, and we will be present at the interviews to facilitate the process. Our expertise lies in facilitating the discussion to bring a consensus regarding the final candidates.

We will work closely with your staff to coordinate and schedule interviews and candidate travel. Our goal is to ensure that each candidate has a very positive experience, as the manner in which the entire process is conducted will affect the candidate's perception of your organization.

## Background Checks/Detailed Reference Checks

We will conduct credit, criminal, civil litigation, and motor vehicle record checks for the top one to three candidates based on final interviews. In addition, those candidates will be the subjects of detailed, confidential reference checks. To gain an accurate and honest appraisal of the candidate's strengths and weaknesses, we will talk candidly with people with direct knowledge of their work and management style. We will ask candidates to provide the names of their supervisors, subordinates, and peers for the past several years. Additionally, we will speak confidentially to individuals known to have insight into a candidate's abilities but who may not be on their preferred list of contacts. At this stage in the recruitment, we will also verify candidates' educational backgrounds and any required certifications.

## Negotiations

We recognize the critical importance of successful negotiations and can serve as your representative during this process. Our experience provides insight into current industry standards and expectations in negotiating contracts, and we will be available to advise you regarding current approaches to difficult issues such as housing and relocation. To secure your chosen candidate's appointment, we will represent your interests and advise you regarding salary, benefits, and employment agreements. We have the expertise to turn a sensitive aspect of the recruitment into one viewed positively by both you and the candidate.

## Complete Administrative Assistance

Throughout the recruitment, we will provide the City with updates on the status of the search and a schedule for actions and deliverables at the beginning of the process. We will also take care of all administrative details on your behalf. Candidates will receive personal correspondence advising them of their status at each critical point during the recruitment. In addition, we will respond to inquiries about the status of their candidacy within 24 hours. Every administrative detail will receive our attention.

# THE TEAM

Our staff at S. Renée Narloch & Associates is comprised of a diverse group of individuals who have extensive experience recruiting public sector executives. The team assigned to the City Administrator search will include Ms. Narloch, the lead consultant, with assistance from Mr. Elliott Pervinich and Ms. Liana Velez Thompson.

## S. Renée Narloch, President

Ms. Narloch is the President of S. Renée Narloch & Associates and the Director of our office in Tallahassee, Florida. She is recognized as one of the nation's leading public-sector recruiters. She has more than 25 years of experience conducting public sector recruitments and has participated in more than 400 searches nationwide. Before forming S. Renée Narloch & Associates, Ms. Narloch spent ten years as the Senior Vice President of a public sector executive search firm responsible for clients in 40 states from Texas northward to the East Coast. She also previously served as a Senior Recruiter with DMG and MAXIMUS with sole responsibility for the firm's executive search practice in the Southeastern, Mid-Atlantic, and Mid-Western states. Ms. Narloch is considered an expert in public sector recruitment and is often a guest speaker at the International City/County Management Association (ICMA) Annual Conference. Ms. Narloch received her Bachelor of Science degree in Information Studies, summa cum laude, from Florida State University, Tallahassee, Florida.

## Elliott S. Pervinich, Vice President

Mr. Pervinich is the Vice President of S. Renée Narloch & Associates' office in Tallahassee, Florida. He concentrates on client outreach and business operations. Mr. Pervinich previously worked for a local city government in central Texas as a team-building trainer and facilitator in corporate development, which has given him great insight into the needs of our clients. He has twelve years of experience in executive administration in the local government and the for-profit sectors. Mr. Pervinich received his Bachelor of Science in Recreation and Leisure Services Administration from Florida State University, Tallahassee, Florida.

## Liana Velez Thompson, Senior Consultant

As a Senior Consultant with S. Renée Narloch & Associates, Ms. Thompson is responsible for research, candidate recruitment, screening, reference checks, and background verifications. She focuses on client communication and works closely with clients to coordinate candidate outreach and ensure a successful search. Before joining S. Renée Narloch & Associates, Ms. Thompson spent several years in special education. Ms. Thompson received her Bachelor of Arts degree, magna cum laude, and a Master of Special Education from Florida State University, Tallahassee, Florida.

# CLIENTS/REFERENCES

## CLIENTS

S. Renée Narloch & Associates' recruiters have extensive experience, placing more than 400 public sector professionals. Below is a list of some of the clients Ms. Narloch recruited in the last few years. For a complete client list, please contact us.

City of Oak Creek, WI
City Administrator
City of Washington, IL
City Administrator
City of Rye, NY
City Manager
City of St. Pete Beach, FL
City Manager, Building Official
City of Topeka, KS
City Manager; Administrative and Financial Services Director
City of Virginia Beach, VA
Deputy City Manager; Assistant Human Services Director
City of Charlottesville, VA
City Manager
Town of Lake Lure, NC
Town Manager; Project Manager
Town of Landis, NC
Town Manager
City of Thomasville, GA
City Manager; Assistant City Manager; City Engineer
City of Coral Springs, FL
City Manager; Deputy City Manager (2 positions); Director of Economic Development; Director of Finance; Police Chief
City of Fort Lauderdale, FL
City Manager; Assistant City Manager; Finance Director; Building Official; City Attorney; Director of Sustainable Development; Deputy Director of Human Resources
City of Tallahassee, FL
City Manager; Human Resource Director; Fire Chief; Director of Airport; Assistant General Manager - Underground Utilities & Public Infrastructure (Engineering Division)
City of Dunedin, FL
Community Development Director; Communications Director; City Manager; Finance Director; City Clerk
City of Dania Beach, FL
City Manager
City of Miami Beach, FL
City Manager
City of Dallas, TX
Assistant Director of Transportation Operations; Assistant Director of Water Utilities; City Manager; City Attorney; Managing Director of Environmental Quality; Assistant Director of Street Services (Maintenance)
City of Arlington, TX
Deputy City Manager; Parks & Recreation Director
City of Baytown, TX
Assistant City Manager; Police Chief; Director of Public Affairs; City Attorney
Town of Addison, TX
City Manager
Seminole County, FL
County Manager; County Attorney
Wake County, NC
County Manager
Cumberland County, NC
Assistant County Manager – Community Support Services; Human Resources Director
Person County, NC
County Manager
York County, SC
County Manager
Franklin County, OH
County Administrator; Animal Care & Control Services Director; Director of Job & Family Services
Hillsborough County, FL
County Administrator; Director of Head Start; Affordable Housing Services Director
Palm Beach County, FL
County Administrator; Director of Capital Improvements
Lee County, FL
County Manager; County Attorney
Pasco County, FL
County Manager
Alachua County, FL
County Manager

Sedgwick County, KS
County Manager; Health Department Director; Director of Human Resources
City of Delray Beach, FL
City Attorney
Broward County, FL
Assistant Director of Economic & Small Business Development; County Attorney; Port Everglades Chief Executive/Port Director; Port Everglades Director of Business Development
City of Gainesville, FL
City Attorney; City Auditor; Chief Plans Examiner; Building Inspector; Planner IV
City of Margate, FL
City Attorney; Director of Environmental and Engineering Services
City of Coconut Creek, FL
City Attorney
City of Wichita, KS
Director of Law; Director of Housing & Community Services
Johnson County, KS
Chief Legal Counsel; County Auditor; County Appraiser
Fort Worth Housing Authority, TX
President/CEO
Workforce Development Board (WDB), OH
Executive Director/CEO
Housing Authority of the City of Tulsa, OK
President/CEO; VP/CFO
San Antonio Housing Authority (SAHA), TX
President and CEO; Director of Community Development Initiatives; Development Services & Neighborhood Revitalization Officer; Director of Information Technology; Director of Human Resources; Director of Federal Housing Programs; Chief Operating Officer; Director of Communications and Public Affairs
Houston Housing Authority, TX
President/CEO
Rochester-Genesee Regional Transportation Authority (RGRTA), NY
Chief Executive Officer (CEO)
Housing Authority of the City of Austin, TX
Vice President/Chief Financial Officer; President/CEO
El Paso Water Utilities-Public Service Board, TX
President/CEO
Housing Authority of the City of Brownsville, TX
Chief Executive Officer (CEO)
SOS Children's Villages – Florida
Chief Executive Officer
Alexandria Redevelopment and Housing Authority (ARHA), VA
Chief Executive Officer
Greater Richmond Transit Co (GRTC), VA
Chief Executive Officer
Early Learning Coalition of Broward County, FL
Chief Executive Officer
New Orleans Redevelopment Authority, LA
Executive Director
Louisiana Housing Corporation, LA
Executive Director
Portsmouth Redevelopment & Housing Authority (PRHA), VA
Executive Director
Florida Public Transportation Association
Executive Director
International Association of Campus Law Enforcement Administrators (IACLEA), MD
Executive Director
Children's Board of Hillsborough County, FL
Executive Director
Western Reserve Transit Authority, OH
Executive Director
TOHO Water Authority, FL
Executive Director; General Counsel
Consolidated Dispatch Agency (Tallahassee), FL
Director
City of Sugar Land, TX
Controller; Assistant Director of Finance; Director of Budget & Strategy
City of San Antonio, TX
Assistant Finance Director – Procurement
City of Quincy, FL
Finance Director
City of Hallandale Beach, FL
Comptroller
Pinellas Suncoast Transit Authority (PSTA), FL
Chief Financial Officer
Centre Area Transportation Authority (CATA), PA
Director of Transportation, Director of Finance, Data Analyst
Wayne County, MI
Chief Deputy CFO; Deputy Chief Director of Personnel
Cincinnati Metropolitan Housing Authority (CMHA), OH
Director of Accounting
Dallas County, TX
Director of Human Resources
Sumter County, FL
Fire Chief; Public Works Director; Development Services Director; Assistant Public Works Director Engineer; Staff Engineer

Scott Consolidated Emergency Communications Center (Scott County, IA)
Emergency Services Dispatch Director
Virginia Commonwealth University (VCU), Richmond, VA
Police Chief
City of St. Cloud, FL
Police Chief; IT Director; Environmental Utilities Director; Human Resources & Risk Management Director
City of West Palm Beach, FL
Director of Public Utilities; Director of Engineering Services
City of Boca Raton, FL
Building Official; Risk Manager

Metropolitan Washington Airports Authority, DC
Vice President for Public Safety
South Padre Island, TX
Convention & Visitors Bureau Director
Community Coordinated Care for Children, FL
Chief Officer of Education
Miami-Dade County, FL Public Housing and Community Development
Director of Public Housing Division; PHCD Development Director; RAD Program Manager; Housing Choice Voucher Division Director
City of Austin, TX
Assistant Director, Public Works Engineering and Project Delivery
Leon County (Tallahassee), FL
Building Official

## REFERENCES

Clients and candidates best testify to our ability to conduct quality searches. Below are a few clients for whom Ms. Narloch has conducted searches. The average tenure of placements is approximately five years.

| | |
|---|---|
| CLIENT: | City of Dunedin, FL |
| REFERENCE: | Ms. Theresa Smalling, Director of Human Resources & Risk Management<br>(727) 298-3042; TSmalling@DunedinFL.Net |
| POSITIONS: | City Manager; Finance Director; City Clerk; Director of Community Development; Director of Communications |
| CLIENT: | City of Thomasville, GA |
| REFERENCE: | Mayor Jay Flowers<br>(229) 379-1006; jayf@hotmasville.org |
| POSITIONS: | City Manager; City Engineer |
| CLIENT: | Seminole County, FL (Reference letter included) |
| REFERENCE: | Ms. Meloney Koontz<br>(407) 665-7225; mkoontz@seminolecountyfl.gov |
| POSITIONS: | County Manager; County Attorney |
| CLIENT: | City of Baytown, TX |
| REFERENCE: | Ms. Carol Flynt, Assistant City Manager<br>(281) 420-6521; carol.flynt@baytown.org |
| POSITIONS: | Assistant City Manager; City Attorney; Police Chief; Director of Public Affairs |

# COST PROPOSAL

## PROFESSIONAL FEE AND EXPENSES

The professional fee for conducting this recruitment on behalf of the City of De Pere is $23,500, plus actual expenses. Services covered by the fee consist of all steps outlined in this proposal, including up to three (3) onsite/video meetings. Expenses are estimated not to exceed $5,450 and include items such as the cost of consultant travel, clerical support, placement of ads, newspaper searches, education verification, as well as credit, criminal, and civil checks. In addition, postage, photocopying, and telephone charges are included and will be allocated. Expenses related to the use of audio/video conferencing equipment by the City for interviews and candidates' travel for interviews are the responsibility of the City of De Pere.

## CANDIDATE TRAVEL

With respect to candidate travel for interviews, we typically ask candidates to make their travel arrangements and advise them that the City will reimburse them directly for reasonable airfare, hotel, and auto expenses if allowed. We advise candidates on what is standard and customary in the industry and the City's expectations and parameters regarding travel. Our experience has been that candidates use discretion and stay within reasonable limits in pricing and scheduling.

## PAYMENT

We will invoice the City of De Pere monthly for professional fees and expenses for services incurred as of the invoice date. We expect payment of the invoice within 30 days of receipt by the City. Typically, this results in three monthly invoices of 30% of professional fees and expenses, with a final invoice for the remaining ten percent of professional fees due upon the selection of the finalist.

## GUARANTEE

We guarantee that should the selected candidate be terminated for cause within the first year of employment, we will search again at no cost (except expenses) to the City. We are confident in our ability to recruit outstanding candidates and do not expect the City to find it necessary to exercise this provision.

## SCHEDULE

We are available to begin the search for the City Administrator immediately, and our current workload is such that we can ensure the City will receive our full attention throughout the entire recruitment process. We will be prepared to recommend finalists within 75 to 90 days from the start of the search. A standard recruitment can typically be completed in less than 16 weeks and follows an approach and schedule similar to the one below:

| WEEK | TASK: |
|---|---|
| 1 | Conduct meetings with the Mayor, the Common Council, and others involved in the process. |
| 2 | Develop recruitment brochure and advertisements. |
| 3 | City reviews recruitment brochure and advertisements. |
| 4 | Recruitment brochure printed and advertisements placed |
| 5 | Active recruitment of candidates begins. |
| 9 | Closing date |
| 10 | Screen resumes |
| 11-12 | Recruiter interviews top candidates |
| 12-13 | Public records search |
| 14 | Review recommendations with the Mayor, the Common Council, and others involved in the process. |
| 15 | Candidates interview with the City, follow-up interviews, and consultant reference/background checks |
| 16 | Candidate selected |

# PROPOSAL FOR
# EXECUTIVE RECRUITMENT SERVICES

## City Administrator
## City of De Pere, Wisconsin

**April 23, 2024**
**This proposal is valid for 60 days**

Strategic Government Resources
P.O. Box 1642, Keller, Texas 76244
Office: 817-337-8581

JJ Peters, President of Executive Recruitment
JJPeters@GovernmentResource.com

April 23, 2024

Hon. Mayor James Boyd and Common Council
City of De Pere, Wisconsin

Dear Mayor Boyd and Alderpersons,

Thank you for the opportunity to submit this proposal to assist the City of De Pere in your recruitment for a new City Administrator. At SGR, we take pride in our unique ability to provide personalized and comprehensive recruitment services to meet your specific needs.

We would like to highlight some key aspects that set SGR apart from other recruitment firms and enable us to reach the most extensive and diverse pool of applicants available:

- SGR is a recognized thought leader in local government management and is actively engaged in local government operations, issues, and best management practices.
- SGR has conducted executive recruitments for over 450 local government clients in 37 states, and we value the long-term relationships we have developed with many of our clients who continue to partner with us on future recruitment needs.
- We have a broad community of over 17,000 followers on LinkedIn, one platform we utilize to connect with a wide range of active and passive candidates across the nation.
- Our Servant Leadership e-newsletter, with a subscriber base of over 40,000 in all 50 states, announces all SGR recruitments, further extending our reach. Your position will also be posted on SGR's website and our Job Board.
- In addition, SGR sends targeted emails to our opt-in Job Alert subscriber database including over 5,000 city management professionals.

We are happy to provide references upon request. We are enthusiastic about the prospect of conducting this recruitment for the City of De Pere, and we are available to schedule a meeting at your convenience to discuss further.

Respectfully submitted,

Jeri J. Peters, President of Executive Recruitment
JJPeters@GovernmentResource.com

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# About SGR

Strategic Government Resources, Inc. (SGR) exists to help local governments become more successful by recruiting, assessing, and developing innovative, collaborative, and authentic leaders. SGR was incorporated in Texas in 2002 with the mission to facilitate innovative leadership in local government. SGR is fully owned by former City Manager Ron Holifield, who spent two high-profile decades in city management and served as a City Manager in several cities.

SGR's business model is truly unique. Although we are a private company, SGR operates like a local government association. Most of SGR's principals are former local government officials, allowing SGR to bring a perspective and depth of local government expertise to every project that no other firm can match.

SGR's Core Values are Customer Service, Integrity, Philanthropy, Continuous Improvement, Agility, Collaboration, Protecting Relationships, and the Golden Rule.

SGR is a full-service firm, specializing in providing solutions for local governments in the areas of recruitment and retention, leadership development and training, innovation and future readiness, and everything in between.

With 28 full-time employees, 1 part-time employee, 27 recruiters, 18 facilitators, and multiple consultants who function as subject matter experts on a variety of projects, SGR offers comprehensive expertise.

The company operates as a fully remote organization, with team members located in Texas, Arizona, California, Colorado, Florida, Georgia, Maine, Missouri, Montana, New York, North Carolina, Ohio, Oklahoma, Oregon, and South Carolina.

View all SGR team members and their bios at: https://sgr.pub/MeetTeamSGR.

# SGR's Unique Qualifications

**Extensive Network of Prospects**

SGR is intent on being a leader in executive recruitment and firmly believes in the importance of proactively building a workforce that reflects the diversity of the communities we serve. We leverage an extensive and diverse network to reach potential applicants.

- Your position will be announced in SGR's Servant Leadership e-newsletter, which reaches over 40,000 subscribers across all 50 states.
- We will send targeted emails to over 5,000 opt-in subscribers of SGR's City Management Job Alerts.
- Your position will appear on SGR's Website, https://sgr.pub/SGRWebsite, which attracts approximately 20,000 visitors per month.
- Your position will be posted on SGR's Job Board, https://sgr.pub/SGRJobBoard, which typically has over 2,000 job listings at any given time and receives approximately 16,000 unique visitors per month.
- SGR implements a comprehensive social media marketing campaign that includes custom-made graphics and distribution on SGR's LinkedIn page.
- We frequently collaborate with various local government associations, including the League of Women in Government, Alliance for Innovation, and the National Forum for Black Public Administrators.
- Approximately 65% of semifinalists selected by our clients learn about open recruitments through our website, servant leadership e-newsletter, job board, job alert emails, social media, or personal contact.

**Collective Local Government Experience**

Our recruiters have decades of experience in local government, as well as regional and national networks of relationships. Our executive recruiters leverage the professional networks of all SGR recruiters when recruiting for a position, enabling outreach to a wide and diverse array of prospective applicants. SGR team members are active on a national basis in local government organizations and professional associations. Many SGR team members frequently speak and/or write on issues of interest to local government executives. SGR can navigate relevant networks as both peers and insiders.

**Listening to Your Unique Needs**

SGR devotes significant time to actively listening to your organization and helping you define and articulate your needs. We work diligently to conduct a comprehensive recruitment process tailored specifically to your organization. SGR dedicates a prodigious amount of energy to understanding your organization's unique culture, environment, and local issues to ensure an alignment in terms of values, philosophy, and management style perspectives.

While we have established systems for achieving success, we are a “boutique” firm capable of adapting to meet a client's specific needs and providing insights on the pros and cons of their preferred approach.

**Trust of Candidates**
SGR has a track record of providing remarkable confidentiality and wise counsel to candidates and next-generation leaders, earning their trust. As a result, we can bring exceptional prospects to the applicant pool. Candidates trust SGR to assess the situation accurately, communicate honestly, and maintain their confidentiality to the greatest extent possible.

**Accessibility and Communication**
Your executive recruiter will keep you informed of the search status and will be readily accessible throughout the recruitment process. Candidates and clients can reach the recruiter at any time via cell phone or email. Additionally, the recruiter maintains communication with active applicants, ensuring they are well-informed about the community and the opportunity.

**Comprehensive Evaluation and Vetting of Candidates**
SGR offers a comprehensive screening process designed to ensure a thorough understanding of candidate backgrounds and to minimize surprises. Our vetting process for a full-service recruitment includes the following key components:

- Prescreening questions and technical review of resumes
- Cross-communication among our recruiters regarding candidates who have been involved in previous searches, providing greater insight into their background and skills.
- Written questionnaires to gain insights beyond what is available through a resume.
- Recorded one-way semifinalist interviews.
- All-inclusive media reports that far surpass automated Google/LexisNexis searches, tailored to each candidate based on their previous places of residence and work.
- Thorough, automated, and anonymous reference checks that provide feedback on candidates from a well-rounded group of references.
- Background checks completed by a licensed private investigation firm.

**Executive Recruitment Clients**
SGR has partnered on executive recruitments with more than 450 local government clients in 37 states. We take great pride in the long-term relationships we have developed with many of our clients who continue to partner with us on future recruitment needs.

View a full list of our Executive Recruitment Clients at: https://sgr.pub/ERClientList.

# DEI in Recruitments

SGR is deeply committed to equal employment opportunity and considers it an ethical imperative. We unequivocally reject any form of bias, expecting that candidates be assessed solely based on their ability to perform the job. Encouraging underrepresented demographic groups to apply is a vital aspect of our commitment. While we cannot guarantee the composition of semifinalist or finalist groups, SGR actively fosters relationships and contacts on a national scale to ensure meaningful participation of underrepresented groups. Our recruitment process is consistently evaluated and refined to incorporate a focus on equity and inclusion.

Statistics are a testament to our commitment to diversity and inclusion. In our 2023 placements, 31% of candidates were female and 23% indicated they were a person of color. Within SGR, our team of six executives includes three women and one person of color, and 79% of SGR's staff members are women. Our internal hiring practices are designed to attract diverse talent from various backgrounds and experiences. We understand the importance of words, ensuring our recruitment materials are inclusive and reflect an equity-focused perspective.

We also actively recommend advertising placements to attract a diverse applicant pool, leveraging partnerships with organizations such as the League of Women in Government, the Local Government Hispanic Network, and the National Forum of Black Public Administrators. Tracking candidate demographic data helps us proactively recruit traditionally underrepresented candidates for senior management positions in local government. We welcome feedback from our clients and candidates, using post-recruitment surveys to refine our processes and outcomes.

# Project Personnel

**Jeff Tyne, Senior Vice President**

JeffTyne@governmentresource.com
817-337-8581

Senior Vice President Jeff Tyne joins SGR with over thirty years of experience in local government management. During that time, he cultivated a wealth of expertise across various facets of public administration. His extensive background includes specialized knowledge in public budgeting, strategic management, finance, and comprehensive oversight of diverse operations. Jeff served in multiple leadership roles throughout his distinguished career, culminating in a six-year tenure as the City Manager for Peoria, Arizona.

Jeff holds a Bachelor of Arts in Political Science and a Master of Public Administration, both from Arizona State University. He also attended the Senior Executives in State and Local Government program at Harvard University and is an ICMA Credentialed Manager.

Jeff has always enjoyed being active in the local government profession. For a number of years, Jeff served as a Trustee with the Arizona State Retirement System, the largest pension fund in Arizona. Jeff was also on the Board of Directors for the Arizona City/County Management Association, former chair of the Government Finance Officers Association National Committee on Economic Development and Capital Planning, and served as Past President of the Government Finance Officers Association of Arizona.

Throughout his career, Jeff has consistently recognized the vital link between a community's quality of life and the health of its public organization. He has developed strategic initiatives aimed at fostering stronger connections between his team and the constituents they serve. By aligning elected officials' priorities, upholding professional standards, facilitating positive public engagement, and encouraging individualized staff growth, Jeff firmly believes that local governments can go to great lengths to build the trust and confidence of their community.

# Approach and Methodology

A full-service recruitment typically entails the following steps:

1. **Organization/Position Insight and Analysis**
    - Project Kickoff Meeting and Develop Anticipated Timeline
    - Stakeholder Interviews and Listening Sessions
    - Develop Recruitment Brochure
2. **Recruitment Campaign and Outreach to Prospective Applicants**
    - Advertising and Marketing
    - Communication with Prospective Applicants
    - Communication with Active Applicants
3. **Initial Screening and Review by Executive Recruiter**
4. **Search Committee Briefing to Review Applicant Pool and Select Semifinalists**
5. **Evaluation of Semifinalists**
    - Written Questionnaires
    - Recorded One-Way Semifinalist Interviews
    - Media Searches - Stage 1, as described below
6. **Search Committee Briefing to Select Finalists**
7. **Evaluation of Finalists**
    - Comprehensive Media Searches - Stage 2, as described below
    - Background Investigation Reports
    - DiSC Management Assessments (if desired, supplemental cost)
    - First Year Plan or Other Advanced Exercise
    - Press Release Announcing Finalists (if requested)
8. **Interview Process**
    - Face-to-Face Interviews
    - Stakeholder Engagement (if desired)
    - Deliberations
    - Reference Checks (may occur earlier in process)
9. **Negotiations and Hiring Process**
    - Determine Terms of an Employment Offer
    - Negotiate Terms and Conditions of Employment
    - Press Release Announcing New Hire (if requested)

## Step 1: Organization/Position Insight and Analysis

**Project Kickoff Meeting and Develop Anticipated Timeline**
SGR will meet with the organization at the outset of the project to discuss the recruitment strategy and timeline. At this time, SGR will also request that the organization provide us with photos and information on the community, organization, and position to assist us in drafting the recruitment brochure.

**Stakeholder Interviews and Listening Sessions**
Stakeholder interviews and listening sessions are integral to SGR's approach. SGR devotes tremendous energy to understanding your organization's unique culture, environment, and goals to ensure you get the right match for your specific needs. Obtaining a deep understanding of your organizational needs is the crucial foundation for a successful executive recruitment. In collaboration with the organization, SGR will compile a list of internal and external stakeholders to meet with regarding the position. These interviews and listening sessions will identify potential issues that may affect the dynamics of the recruitment and contribute to a comprehensive understanding of the position, special considerations, and the political environment. This process fosters organizational buy-in and will assist us in creating the position profile.

**Develop Recruitment Brochure**
After the stakeholder meetings, SGR will develop a recruitment brochure, which will be reviewed and revised in partnership with your organization until we are in agreement that it accurately represents the sought-after leadership and management attributes.

To view sample recruitment brochures, please visit:
https://sgr.pub/OpenRecruitments

## Step 2: Recruitment Campaign and Outreach to Prospective Applicants

**Advertising and Marketing**
The Executive Recruiter and the client work together to determine the best ways to advertise and recruit for the position. SGR's Servant Leadership e-newsletter, with a reach of over 40,000 subscribers in all 50 states, will announce your position. Additionally, we will send targeted emails to opt-in subscribers of SGR's Job Alerts, and your position will be posted on SGR's website and Job Board. SGR provides a comprehensive social media marketing campaign that includes custom-made graphics and distribution on SGR's LinkedIn page. Furthermore, we will provide a recommended list of ad placements to be approved by the client, targeting the most effective venues for reaching qualified candidates for that particular position.

**Communication with Prospective Applicants**
SGR maintains regular communication with interested prospects throughout the recruitment process. Outstanding candidates often conduct thorough research on the available position before submitting their resumes.

As a result, we receive a significant number of inquiries, and it is crucial for the executive search firm to be well-prepared to respond promptly, accurately, and comprehensively, while also offering a warm and personalized approach. This initial interaction is where prospective candidates form their first impression of the organization, and it is an area in which SGR excels.

**Communication with Active Applicants**

Handling the flow of resumes is an ongoing and significant process. On the front end, it involves tracking resumes and promptly acknowledging their receipt. It also involves timely and personalized responses to any questions or inquiries. SGR maintains frequent communication with applicants to ensure they remain enthusiastic and well-informed about the opportunity. Additionally, SGR communicates with active applicants, keeping them informed about the organization and community.

## Step 3: Initial Screening and Review by Executive Recruiter

SGR uses a triage process to identify high-probability, medium-probability, and low-probability candidates. This triage ranking is focused on overall assessment based on interaction with the applicant, qualifications, any known issues concerning previous work experience, and evaluation of cultural fit with the organization.

In contrast with the triage process mentioned above, which focuses on subjective assessment of the resumes and how the candidates present themselves, we also evaluate each candidate to ensure that the minimum requirements of the position are met and determine which preferred requirements are satisfied. This sifting process examines how well candidates' applications align with the recruitment criteria outlined in the position profile.

## Step 4: Search Committee Briefing to Review Applicant Pool and Select Semifinalists

At this briefing, SGR will conduct a comprehensive presentation to the Search Committee and facilitate the selection of semifinalists. The presentation will include summary information on the process to date, outreach efforts, the candidate pool demographics, and any identified trends or issues. Additionally, a briefing on each candidate and their credentials will be provided.

## Step 5: Evaluation of Semifinalists

The review of resumes is a crucial step in the executive recruitment process. However, resumes may not fully reveal an individual's personal qualities and their ability to collaborate effectively with others. In some instances, resumes might also tend to exaggerate or inflate accomplishments and experience.

At SGR, we understand the significance of going beyond the surface level of a resume to ensure that candidates who progress in the recruitment process are truly qualified for the position and a suitable match for the organization. Our focus is to delve deeper and gain a comprehensive understanding of the person behind the resume, identifying the qualities that make them an outstanding prospect for your organization.

During the evaluation of semifinalist candidates, we take the initiative to follow up when necessary, seeking clarifications or additional information as needed. This approach ensures that we present you with the most qualified and suitable candidates for your unique requirements. At SGR, our ultimate goal is to match your organization with individuals who possess not only the necessary qualifications but also the qualities that align with your organizational culture and values.

**Written Questionnaires**

As part of our thorough evaluation process, SGR will request semifinalist candidates to complete a comprehensive written exercise. This exercise is designed to gain deeper insight into the candidates' thought processes and communication styles. Our written instrument is customized based on the priorities identified by the Search Committee. The completed written instrument, along with cover letters and resumes submitted by the candidates, will be included in the semifinalist briefing book.

**Recorded One-Way Semifinalist Interviews**

Recorded one-way interviews will be conducted for semifinalist candidates. This approach provides an efficient and cost-effective way to gain additional insights to aid in selecting finalists to invite for an onsite interview. The interviews allow the Search Committee to evaluate technological competence, demeanor, verbal communication skills, and on-camera presence. Additionally, virtual interviews provide an opportunity for the Search Committee to ask candidates questions on specific topics of special interest.

**Media Searches - Stage 1**

“Stage 1” of our media search process involves the use of the web-based interface Nexis Diligence™. This platform is an aggregated subscription-based platform that allows access to global news, business, legal, and regulatory content. These media reports at the semifinalist stage have proven helpful by uncovering issues that may not have been previously disclosed by prospective candidates. The recruiter will communicate any “red flags” or noteworthy media coverage to the Search Committee as part of the review of semifinalists with the Search Committee.

## Step 6: Search Committee Briefing to Select Finalists

Prior to this briefing, SGR will provide the Search Committee with a briefing book on the semifinalist candidates via an electronic link. The briefing book includes cover letters, resumes, and completed questionnaires.

If applicable, a separate email with the link to view the recorded online interviews is sent to the Search Committee. The objective of this meeting is to narrow the list to finalists who will be invited to participate in onsite interviews.

## Step 7: Evaluation of Finalists

### Comprehensive Media Searches - Stage 2

"Stage 2" of our media search process includes the web-based interface Nexis Diligence™, supplemented by Google as an additional tool. By combining both resources, we offer an enhanced due diligence process to our clients, enabling efficient and thorough vetting of candidates and minimizing the risk of overlooking critical information. The Stage 2 media search consists of a more complex search, encompassing social media platforms, and has proven to be instrumental in identifying potential adverse news about the candidate that may not have been disclosed previously. The media search provides the Search Committee with an overview of the candidate's press coverage throughout their career. View a sample media report at: https://sgr.pub/SGRMediaReport.

### Background Investigation Reports

Through SGR's partnership with a licensed private investigation firm, we are able to provide our clients with comprehensive background screening reports that include the detailed information listed below. View a sample background report at: https://sgr.pub/SGRBackgroundReport.

- Social security number trace
- Address history
- Driving record (MVR)
- Federal criminal search
- National criminal search
- Global homeland security search
- Sex offender registry search
- State criminal court search for states where candidate has lived in previous 10 years
- County wants and warrants for counties where candidate has lived or worked in previous 10 years
- County civil and criminal search for counties where candidate has lived or worked in previous 10 years
- Education verification
- Employment verification for previous 10 years (if requested)
- Military verification (if requested)
- Credit report (if requested)

### DiSC Management Assessments (if desired, supplemental cost)

SGR utilizes the DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management assessment provides a comprehensive analysis and report on the candidate's preferences in five crucial areas: management style, directing and delegating, motivation, development of others, and working with their own manager. View a sample report at: https://sgr.pub/SGRDiSCReport.

For assessments of more than two candidates, a DiSC Management Comparison Report is included, offering a side-by-side view of each candidate's preferred management style. View a sample comparison report at: https://sgr.pub/SGRDiSCCompare.

**First-Year Plan or Other Advanced Exercise**
SGR will collaborate with your organization, if desired, to create an advanced exercise for the finalist candidates. One such example is a First-Year Plan, where finalist candidates are encouraged to develop a first-year plan based on their current understanding of the position's opportunities and challenges. Other exercises, such as a brief presentation on a topic to be identified by the Recruiter and Search Committee, are also typically part of the onsite interview process to assess finalists' communication and presentation skills, as well as critical analysis abilities.

## Step 8: Interview Process

**Face-to-Face Interviews**
SGR will arrange interviews at a date and time convenient for your organization. This process can be as straightforward or as elaborate as your organization desires. SGR will aid in determining the specifics and assist in developing the interview schedule and timeline. We will provide sample interview questions and participate throughout the process to ensure it runs smoothly and efficiently.

**Stakeholder Engagement**
At the discretion of the Search Committee, we will closely collaborate with your organization to involve community stakeholders in the interview process. Our recommendation is to design a specific stakeholder engagement process after gaining deeper insights into the organization and the community. As different communities require distinct approaches, we will work together to develop a tailored approach that addresses the unique needs of the organization.

**Deliberations**
SGR will facilitate a discussion about the finalist interviews and support the Search Committee in making a hiring decision or determining whether to invite one or more candidates for a second interview.

**Reference Checks**
SGR uses a progressive and adaptive automated reference check system to provide insights on candidates' soft skills from a well-rounded group of references. References may include elected officials, direct supervisors, direct reports, internal organizational peers, professional peers in other organizations, and civic leaders. SGR's reference check platform is anonymous, proven to encourage more candid and truthful responses, thus providing organizations with more meaningful and insightful information on candidates. SGR delivers a written summary report to the organization once all reference checks are completed. The timing of reference checks may vary depending on the specific search process and situation. If finalists' names are made public prior to interviews, SGR will typically contact references before the interview process. If the finalists' names are not made public prior to interviews, SGR may wait until the organization has selected its top candidate before contacting references to protect candidate confidentiality.

## Step 9: Negotiations and Hiring Process

### Determine Terms of an Employment Offer

Upon request, SGR will provide draft employment agreement language and other helpful information to aid in determining an appropriate offer to extend to your preferred candidate.

### Negotiate Terms and Conditions of Employment

SGR will assist to whatever degree you deem appropriate in conducting negotiations with the chosen candidate. SGR will identify and address any special needs or concerns of the selected candidate, including potential complicating factors. With our experience and preparedness, SGR is equipped to facilitate win-win solutions to resolve negotiation challenges.

### Press Release (if requested)

Until employment negotiations are finalized, you should exercise caution to avoid the embarrassment of a premature announcement that may not materialize. It is also considered best practice to notify all senior staff and unsuccessful candidates before any media exposure. SGR will assist in coordinating this process and in crafting any necessary announcements or press releases.

## Satisfaction Surveys

SGR is committed to following the golden rule, which means providing prompt, professional and excellent communication while always treating every client with honor, dignity and respect. We request clients and candidates to participate in a brief and confidential survey after the completion of the recruitment process. This valuable feedback assists us in our ongoing efforts to improve our processes and adapt to the changing needs of the workforce.

## Post-Hire Services

We offer post-hire services, such as executive coaching, team-building retreats, and performance review assistance at the six-month or one-year mark. For more information or to request a customized proposal, please visit https://www.governmentresource.com/leadership-development-training-resources.

# Typical Timeline *

The timeline below is an example only, and we will work with you to finalize and approve a timeline, with adjustments made if needed after the position is posted.

| Initial Steps Prior to Posting Position: | |
|---|---|
| • Contract Execution<br>• Kickoff Meeting to Discuss Recruitment Strategy and Timeline<br>• Organization/Position Insight and Analysis<br>• Stakeholder Interviews and Listening Sessions<br>• **Deliverable**: Draft Recruitment Brochure<br>• **Deliverable**: Recommended Ad Placements<br>• Organization Approves Ad Placements<br>• Search Committee Reviews and Approves Brochure | *Timing varies and usually takes a minimum of 2-3 weeks.* |

| Task | Week |
|---|---|
| • Post Position and Firm up Timeline<br>• Recruitment Campaign and Outreach to Prospective Applicants<br>• Initial Screening and Review by Executive Recruiter | Weeks 1-4 |
| • Search Committee Briefing to Review Applicant Pool and Select Semifinalists | Week 5 |
| • Questionnaires<br>• Recorded One-Way Semifinalist Interviews<br>• Media Searches - Stage 1, as described in Approach/Methodology | Week 6 |
| • **Deliverable**: Semifinalist Briefing Books via Electronic Link<br>• **Deliverable**: Recorded Online Interviews, if applicable | Week 7 |
| • Search Committee Briefing to Select Finalists | Week 8 |
| • Comprehensive Media Searches - Stage 2, as described in Approach/Methodology<br>• Background Investigation Reports<br>• Disc Management Assessments (if desired, supplemental cost)<br>• First-Year Plan or Other Advanced Exercise (if desired) | Weeks 9-10 |
| • **Deliverable**: Finalist Briefing Books via Electronic Link | Week 11 |
| • Face-to-Face Interviews<br>• Stakeholder Engagement (if desired)<br>• Deliberations<br>• Reference Checks (may occur earlier in process)<br>• Negotiations and Hiring Process | Week 12 |

** Timeline is dependent upon Search Committee availability and Holidays. Organization agrees to timely provide photos/graphics and information necessary to develop recruitment brochure, narrow candidate field, and conduct candidate screening; failure to do so, may in SGR's reasonable discretion, extend timeline and can negatively impact the outcome of the process.*

# Fee Proposal

**Not-to-Exceed Price: $27,900**

**Not-to-Exceed Price is comprised of:**

- **Fixed Fee of $25,400**
- **Up to $2,500 in Ad Placements (billed at actual cost)**

**The Fixed Fee includes:**

- Stakeholder Interviews and Listening Sessions
- Production of a Professional Recruitment Brochure
- Recruitment Campaign and Outreach:
    - Outreach to Prospective Applicants
    - Custom Graphics for Email and Social Media Marketing
    - Announcement in SGR's Servant Leadership e-Newsletter
    - Post on SGR's Website
    - Ad on SGR's Job Board
    - Two (2) Targeted Job Blasts to SGR's Opt-In Subscriber Database
    - Promotion on SGR's LinkedIn
- Application Management, Screening, and Evaluation
- Semifinalist Evaluation:
    - Questionnaires for up to 15 Semifinalists
    - Recorded One-Way Interviews for up to 15 Semifinalists
    - Media Searches – Stage 1 Reports for up to 15 Semifinalists
- Semifinalist Briefing Books via Electronic Link
- Comprehensive Stage 2 Media Reports for up to Five (5) Finalists
- Background Investigation Reports for up to Five (5) Finalists
- Finalist Briefing Books via Electronic Link
- Reference Checks for up to Five (5) Finalists
- Two (2) Onsite Visits by the Recruiter for 1-3 days each, Inclusive of Travel Costs

**Reimbursable Expenses <u>included</u> in the not-to-exceed price:**

- Ad placements up to $2,500 will be billed at the actual cost with no markup for overhead and are incorporated into our not-to-exceed price.

**Reimbursable Expenses <u>not included</u> in the not-to-exceed price:**

- Ad placements over and above $2,500 will be billed back at actual cost with no markup for overhead.

**Supplemental Services/Other Expenses <u>not included</u> in the fixed or not-to-exceed price:**

- There may be additional charges for substantial and substantive changes made to the recruitment brochure after the brochure has been approved by the Organization and the position has been posted online. Organization would be notified of any supplemental costs prior to changes being made.
- At your request, SGR can conduct an online stakeholder survey for $1,500 to help identify key issues or priorities that you may want to consider prior to launching the search. SGR provides recommended survey questions and sets up an online survey. Stakeholders are directed to a web page or invited to take the survey by email. A written summary of results is provided to the Organization. Please note that this type of survey may extend the recruitment timeline.
- Online interviews over and above the 15 included in the Fixed Fee - $250 per candidate.
- Additional comprehensive stage 2 media reports over and above the maximum of five (5) included in the fixed price above - $750 per candidate.
- Additional background investigation reports over and above the maximum of five (5) included in the fixed price above - $500 per candidate.
- Additional reference checks over and above the maximum of five (5) included in the fixed price above - $250 per candidate.
- DiSC Management assessments - $175 per candidate.
- Semifinalist and finalist briefing materials will be provided to the Organization via an electronic link. Should the Organization request printing of those materials, the reproduction and shipping of briefing materials will be outsourced and be billed back at actual cost.
- Additional onsite visits by the recruiter over and above the two (2) onsite visits included in the fixed price are an additional cost. Travel time and onsite time are billed at a professional fee of $1,000 per day. Meals are billed back at a per diem rate of $15 for breakfast, $20 for lunch, and $30 for dinner. Mileage will be reimbursed at the current IRS rate. All other travel-related expenses are billed back at actual cost with no markup for overhead.
- The organization bears the cost of candidate travel, and candidates are reimbursed directly by the organization.
- If the organization desires any supplemental services not mentioned in this fee proposal, an estimate of the cost will be provided at that time, and no work shall be done without approval.

**Billing**

SGR will bill the fixed fee in four (4) installments: 30% upon contract execution, 30% after the applicant pool is presented, 30% after finalist interviews, and 10% upon acceptance of employment. Ad placement expenses and supplemental services/other expenses will be billed as incurred or provided.

# Terms and Conditions

- The organization agrees not to discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status, or any other basis that is prohibited by federal, state, or local law.
- The organization agrees to refer all prospective applicants to SGR and not to accept applications independently during the recruitment process.
- The organization agrees to provide SGR with any candidates that were previously accepted as applicants for the given position before engaging SGR to conduct the recruitment for the subject position.
- If the organization wishes to place ads in local, regional, or national newspapers, the organization shall be responsible for paying directly for the ads and for placing the ads using language provided by SGR.
- The organization bears the cost of candidate travel, and candidates are reimbursed directly by the organization.

# Placement Guarantee

SGR is committed to your satisfaction with the results of our full service recruitment process. If, for any reason, you are not satisfied, we will repeat the entire process one additional time, and you will be charged only for expenses as described in the Fee Proposal under Supplemental Services. Additionally, we promise not to directly solicit any candidate selected under this engagement for another position while they are employed with your organization.

In the event that you select a candidate fully vetted by SGR, who subsequently resigns or is released for any reason within 12 months of their hire date, we are committed to conducting a one-time additional executive search to identify a replacement. In this case, you will only be charged for related expenses as described in the Fee Proposal.

If your organization circumvents SGR's recruitment process and selects a candidate who did not participate in the full recruitment process, the placement guarantee will be null and void. Additionally, SGR does not provide a guarantee for candidates placed as a result of a partial recruitment effort or limited scope recruitment.

# City & County Management Recruitments, 2019-Present

**In Progress**

- Brunswick, Maine (pop. 21,000) - Town Manager
- Coffeyville, Kansas (pop. 9,000) - City Manager
- Duncan, Oklahoma (pop. 23,000) - City Manager
- Manhattan, Kansas (pop. 55,000) – City Manager
- Marysville, Kansas (pop. 3,500) - City Administrator
- Medford, Oregon (pop. 86,000) - City Manager
- Miami, Oklahoma (pop. 13,000) - City Manager
- New Smyrna Beach, Florida (pop. 32,000) - City Manager
- Orono, Maine (pop. 11,000) - Town Manager
- San Juan County, Washington (pop. 18,000) - County Manager
- Scarsdale, New York (pop. 18,000) - Village Manager
- Topeka, Kansas (pop. 125,000) - City Manager
- Treasure Island, Florida (pop. 6,500) - City Manager

**2024**

- DuPont, Washington (pop. 10,000) - City Administrator
- Edwardsville, Kansas (pop. 4,700) - City Manager
- Leander, Texas (pop. 80,000) - City Manager

**2023**

- Camp Verde, Arizona (pop. 12,000) - Town Manager
- Cleburne, Texas (pop. 33,000) - City Manager
- Bristol, Tennessee (pop. 27,000) - City Manager
- Dobbs Ferry, New York (pop. 11,000) - Village Administrator
- Gatesville, Texas (pop. 16,000) - City Manager
- Glastonbury, Connecticut (pop. 35,000) - Town Manager
- Great Bend, Kansas (pop. 15,000) - City Administrator
- Justin, Texas (pop. 5,000) - City Manager
- Lafayette, Colorado (pop. 30,000) - City Administrator
- Laredo, Texas (pop. 256,000) - City Manager
- Largo, Florida (pop. 84,000) - City Manager
- Lawton, Oklahoma (pop. 90,000) - City Manager
- Mexia, Texas (pop. 7,000) - City Manager

- Nassau Bay, Texas (pop. 5,000) - City Manager
- Navajo County, Arizona (pop. 106,000) - County Manager
- Ottawa, Kansas (pop. 12,500) - City Manager
- Parker, Arizona (pop. 3,500) - Town Manager
- Rowlett, Texas (pop. 68,000) - City Manager
- Shawnee, Kansas (pop. 69,000) - City Manager
- Snoqualmie, Washington (pop. 14,000) - City Administrator
- Snyder, Texas (pop. 11,000) - City Manager
- Stillwater, Oklahoma (pop. 48,000) - City Manager
- Trophy Club, Texas (pop. 13,000) - Town Manager
- Williston, North Dakota (pop. 29,000) - City Administrator

**2022**

- Aledo, Texas (pop. 5,500) - City Manager
- Blaine, Washington (pop. 6,000) - City Manager
- Crandall, Texas (pop. 4,000) - City Manager
- Dalhart, Texas (pop. 8,500) - City Manager
- Edinburg, Texas (pop. 100,000) - City Manager
- Fort Collins, Colorado (pop. 175,000) - City Manager
- Frisco, Colorado (pop. 3,000) - Town Manager
- Graham, Texas (pop. 8,000) - City Manager
- Hutto, Texas (pop. 40,000) - City Manager
- Johnston, Iowa (pop. 24,000) - City Administrator
- Kennebunk, Maine (pop. 11,000) - Town Manager
- Kennedale, Texas (pop. 9,000) - City Manager
- Ketchikan, Alaska (pop. 8,000) - City Manager/Public Utilities General Manager
- Klamath Falls, Oregon (pop. 22,000) - City Manager
- Leawood, Kansas (pop. 34,000) - City Administrator
- Levelland, Texas (pop. 14,000) - City Manager
- Live Oak, Texas (pop 16,000) - City Manager
- Madisonville, Texas (pop. 4,500) - City Manager
- Manor, Texas (pop. 15,000) - City Manager
- Marshall, Texas (pop. 23,000) - City Manager
- Mineral Wells, Texas (pop. 15,000) - City Manager
- Mont Belvieu, Texas (pop. 8,000) - City Manager
- Montgomery, Texas (pop. 2,400) - City Administrator
- Nassau Bay, Texas (pop. 5,000) - City Manager
- Parkville, Missouri (pop. 7,000) - City Administrator

- Rocky Hill, Connecticut (pop. 21,000) - Town Manager
- Sunnyvale, Texas (pop. 8,000) - Town Manager
- Tolland, Connecticut (pop. 15,000) - Town Manager
- Walla Walla, Washington (pop. 34,000) - City Manager
- West Lake Hills, Texas (pop. 3,000) - City Administrator
- Wethersfield, Connecticut (pop. 26,000) - Town Manager
- Wickenburg, Arizona (pop. 7,500) - Town Manager

**2021**

- Bainbridge Island, Washington (pop. 25,000) - City Manager
- Breckenridge, Texas (pop. 5,000) - City Manager
- Bridgeport, Texas (pop. 6,500) - City Manager
- Briarcliff Manor, New York (pop. 8,000) - Village Manager
- Chandler, Arizona (pop. 270,000) - City Manager
- Chanhassen, Minnesota (pop. 27,000) - City Manager
- Chickasha, Oklahoma (pop. 16,000) - City Manager
- Choctaw, Oklahoma (pop. 12,000) - City Manager
- Clermont, Florida (pop. 44,000) - City Manager
- Flower Mound, Texas (pop. 79,000) - Town Manager
- Johnson City, Tennessee (pop. 65,000) - City Manager
- Kennett Square, Pennsylvania (pop. 6,000) - Borough Manager
- Lago Vista, Texas (pop. 8,000) - City Manager
- Lamar, Colorado (pop. 7,500) - City Administrator
- Monett, Missouri (pop. 9,000) - City Administrator
- North Port, Florida (pop. 77,000) - City Manager
- Port Chester, New York (pop. 30,000) - Village Manager
- Sherwood, Oregon (pop. 20,000) - City Manager
- Snoqualmie, Washington (pop. 14,000) - City Administrator
- Spokane, Washington (pop. 220,000) - City Administrator

**2020**

- Argyle, Texas (pop. 4,000) - Town Administrator
- Bay City, Texas (pop. 17,000) - City Manager
- Bedford, Texas (pop. 49,000) - City Manager
- Boerne, Texas (pop. 16,000) - City Manager
- Castroville, Texas (pop. 3,000) - City Administrator
- Clinton, Connecticut (pop. 13,500) - Town Manager

- Commerce, Texas (pop. 9,000) - City Manager
- Covington, Georgia (pop. 14,000) - City Manager
- DeSoto, Texas (pop. 56,000) - City Manager
- Duncanville, Texas (pop. 40,000) - City Manager
- Hutchinson, Kansas (pop. 42,000) - City Manager
- Hutto, Texas (pop. 30,000) - City Manager
- Iola, Kansas (pop. 5,500) - City Administrator
- Johns Creek, Georgia (pop. 84,000) - City Manager
- Joplin, Missouri (pop. 50,000) - City Manager
- Miami, Oklahoma (pop. 13,500) - City Manager
- Mission Hills, Kansas (pop. 3,500) - City Administrator
- Nacogdoches, Texas (pop. 33,000) - City Manager
- Santa Fe, Texas (pop. 13,000) - City Manager
- Tigard, Oregon (pop. 53,000) - City Manager
- Westworth Village, Texas (pop. 3,000) - City Administrator

**2019**

- Blaine, Minnesota (pop. 65,000) - City Manager
- Bullard, Texas (pop. 4,000) - City Manager
- Campbell County, Wyoming (pop. 46,000) - Commissioners' Administrative Director/County Administrator
- Canyon, Texas (pop. 15,000) - City Manager
- Copperas Cove, Texas (pop. 34,000) - City Manager
- Killeen, Texas (pop. 145,000) - City Manager
- Kingsville, Texas (pop. 26,000) - City Manager
- Lamar, Colorado (pop. 7,500) - City Administrator
- Lenexa, Kansas (pop. 55,000) - City Manager
- Mineral Wells, Texas (pop. 15,000) - City Manager
- Orange, Texas (pop. 19,000) - City Manager
- Palm Coast, Florida (pop. 86,000) - City Manager
- South Windsor, Connecticut (pop. 26,000) - Town Manager
- Springfield, Oregon (pop. 62,000) - City Manager
- Terrell, Texas (pop. 17,000) - City Manager
- Tolland, Connecticut (pop. 15,000) - Town Manager
- Vail, Colorado (pop. 5,000) - Town Manager
- Venus, Texas (pop. 5,000) - City Administrator
- Victoria, Texas (pop. 67,000) - City Manager
- West Lake Hills, Texas (pop. 3,000) - City Administrator

# TOWN MANAGER

*Orono, Maine*

Town of ORONO
HOME OF THE UNIVERSITY OF MAINE

EXECUTIVE RECRUITMENT PROVIDED BY SGR

## THE COMMUNITY

Orono offers small-town connectivity and big-university opportunities on the edge of the Maine wilderness.

The Town stretches across 18 square miles of Penobscot County, situated along Interstate 95, and is home to approximately 11,360 of the greater metro area's 153,700 residents. A community full of wisdom, talent, respect, and energy that delivers amazing opportunities in its neighborhoods and innovations that shape the world, Orono's residents also share a strong commitment to belonging, environmental stewardship, education, and municipal services.

The territories of Orono and Old Town, in the heartland of the ancestral home of the Penobscot Nation since time immemorial, and where many Penobscot people continue to reside, were first settled by Anglo-Americans in 1774. The Town of Orono was incorporated in 1806 and named in honor of Penobscot Chief Joseph Orono. As Maine achieved statehood in 1820, the town grew as a predominantly agricultural and industrial community, home to several lumber mills, a burgeoning manufacturing sector, and, ultimately, the University of Maine established in 1897.

Throughout the 20th century, Orono continued to develop as an economically and culturally diverse community, maintaining both agricultural and light manufacturing sectors and emerging as a service center while also providing home to a robust academic community. Today, it stands out as a safe community with a distinct identity, a gateway to Maine's North Woods, and a town committed to living its values.

Residents here enjoy a walkable, nature-focused community on the banks of the Stillwater and Penobscot rivers. Opportunities for canoeing, cross-country skiing, mountain biking, birdwatching, fishing, skating, and freshwater swimming are plentiful, and many of Maine's natural treasures, including Baxter State Park, Acadia National Park, and Mt. Katahdin — the state's highest peak and the northern terminus of the Appalachian Trail — can be reached in about an hour.

Orono recently celebrated the opening of the Caribou Bog Outdoor Center, a four-season outdoor center nestled within an extensive corridor of conservation lands, and area residents seeking an out-of-this-world experience are invited to the Versant Power Astronomy Center featuring the Maynard Jordan Planetarium. Other popular destinations include the Collins Center for the Arts, Page Farm & Home Museum, Hudson Museum, and Littlefield Ornamentals Trial Garden, and local families stay busy at the Orono Trampoline Park, Black Bear Cinemas, Orono Arcade, community events, and numerous area ski resorts, including Sugarloaf.

RSU 26 campuses are rated among the very best in Maine, educating over 800 students, and in addition to the University of Maine, area colleges and universities include Husson University, Eastern Maine Community College, the University of Maine Augusta – Bangor, and Beal University.

Over the next decade, hundreds of millions of dollars in new investments will be made to support the University of Maine's academic, research, and service missions as well as its Division I athletic programs. Over the same period, the Town will pursue transformational community projects meant to enrich the lives and experiences of everyone who lives, works, and learns in Orono.

## THE COMMUNITY *continued*

While Orono features a great selection of local shops, restaurants, and breweries, residents also benefit from Bangor just minutes away. A large city by Maine standards, Bangor is home to two major hospitals, an international airport, an arena, concert and performance venues, major retailers, and eclectic dining and shopping experiences.

The median household income in Orono is approximately $56,682, while the average home is around $214,600.

# Home of the University of Maine

## MAJOR EMPLOYERS

University of Maine

Sargent Corporation

RSU 26

Orono Commons

Dirigo Pines

Town of Orono

Independent Advocates of Maine/ Treats Falls House

University Credit Union

The Housing Foundation

Orono IGA

## YOUR VOICE MATTERS

The Orono Town Council has adopted a service promise and set priorities for itself to establish direction and build a stronger culture of citizen engagement and trust. These priorities will help make sure your voice matters in Orono.

**Bringing Ideas to Life:** Residents, neighborhoods, and community organizations know best what makes Orono a great place to live. We will commit shared resources to support citizen-led initiatives and launch new ideas that bring Orono together.

**Listening to Everyone:** We make decisions together in Orono. Everyone who wants to be heard must have a fair chance to participate in a clearly articulated process that includes timely updates to stakeholders. We will create personal connections through events and experiences, survey residents to collect comprehensive feedback, and promote Diversity, Equity, Inclusion and Belonging in Orono.

**Making Engagement Easy:** The Council relies on the expertise of professional staff to deliver services and navigate complexity while striving to make citizenship as simple as possible. We will work with staff to simplify processes where we can and to produce easy-to-find video tutorials or one-page summaries that make Orono's policies and procedures easy to understand.

**Stewarding Our Resources:** Orono's tax dollars fund our priorities and compensate hardworking, essential employees who educate, protect, and serve us all. We maintain accountability and set priorities for our limited resources through an open budget process and the best available data, trends, and projections. Residents are invited to help the Council ask questions and understand how spending decisions create opportunities and impact the tax burden. We all must act as stewards of our environment. Members of our community are leaders and experts in the work of preservation, sustainability, and access who can help shape decisions about ongoing operations and the future of Orono.

## GOVERNANCE & ORGANIZATION

The Town of Orono operates under a council-manager form of government with a seven-member Town Council, all of whom are elected at-large. By charter, the council selects a chairperson from among its members following each election. Members of the Town Council serve for three-year terms and are responsible for providing policy direction to the Town Manager.

The Town Manager is tasked with putting council policy into action. They also hire all town staff, are responsible for all contracted personnel, and appoint the Town Clerk, Treasurer, Tax Collector, Town Assessor, and all department heads, with confirmation by the Town Council. Major projects underway or recently completed include a public safety building assessment, library expansion, community building assessment, and improvements along the Route 2 corridor.

## ABOUT THE POSITION

Under the direction of the Town Council, the Town Manager directs the administration and operation of Orono's government in accordance with the Town Charter, ordinances, applicable state and federal laws, and relevant municipal management principles.

In addition to managing the organization's nearly $20.73 million annual budget and overseeing the daily operations of the Town's 84 employees, this position is responsible for assisting the Town Council in developing, formulating, and implementing goals, objectives, and programs in anticipation of future needs; directing the Town's capital improvement program; and advising the council on policy, carrying out its implementation once adopted. The role also involves working cooperatively with the Town Council and staff, administering grants, and responding to citizen and community concerns.

In addition to the Town Council, the selected candidate will work closely with the council-appointed Town Attorney, state and federal officials, the Orono School Department, and Orono-Veazie Water District, as well as officials from neighboring communities. Along with council members, the role also serves as a representative of the Town to citizen groups, the business community, the media, other public agency executives, community organizations, various advisory boards and commissions, and the University of Maine.

## OPPORTUNITIES & CHALLENGES

Orono's next Town Manager should be ready to advance the community's shared values relative to diversity, equity, inclusion, and belonging and have experience helping a broad community of stakeholders improve understanding and achieve common goals. Other priorities identified by participants looking to the Town of Orono's future as part of this candidate search include infrastructure, community, housing affordability, taxes, and climate change.

## EDUCATION & EXPERIENCE

The position requires a bachelor's degree or an equivalent combination of credentials and experience in a related field. An advanced degree or equivalent credentials are preferred. Candidates should also have at least five years of progressive management experience within a municipal government or similarly structured organization; experience working directly with a governing board is preferred.

Candidates should have demonstrated success in the development and/or implementation of strategic plans, collaborative management, and stakeholder empowerment and have proven themselves as an adaptable, ethical leader. Additionally, they should be able to set goals and manage for success across administrative functions, including financial management and capital improvement planning, human resources, and the departments of a community-engaged town government.

An understanding of public sector expectations is necessary, including a familiarity with how federal, state, and local laws impact operations.

The Town Manager may reside outside of Orono's town limits only with the written approval of the Town Council. The council expects its manager to live in the community but understands that the housing market in Orono is tight and intends to accommodate a reasonable time for residential transition and extenuating circumstances.

## IDEAL CANDIDATE

Orono is a community of kindness, talent, and boundless opportunity seeking a Town Manager who can help bring it all together.

Community leaders are searching for a trustworthy and charismatic public servant with senior-level management experience as a municipal manager or equivalent leadership role within a complex mission-oriented institution or agency of service-focused professionals. Candidates should have the knowledge and talents to make for effective and empowering public sector leadership and experience collaborating with a council, citizen committees, and advisory boards.

The right fit for this position will have experience taking an active role in community relations and be willing to devote the time to establish a positive presence for Town government with various organizations. Experience in financial and budget management, strategic planning, community and economic development, employee and labor relations and contract negotiation, community relations, team building and conflict resolution, and natural resource conservation and land use management is essential.

The town's next manager must be an adaptive and reliable leader, capable of supporting a team of professional staff that provides the functional and operational expertise needed to meet Orono's high expectations for municipal services. They should also be a collaborative leader with the courage to empower others in the pursuit of innovation and win-win solutions and an organized leader, helping the Town stay grounded in what can and needs to be done today while daring staff, citizens, students, and stakeholders to think big and work together for a better tomorrow.

The ideal candidate has superior interpersonal abilities and a genuine interest in bringing people together to achieve understanding and common goals. The manager will work with integrity, transparency, and, at times, vulnerability to build trust and encourage citizen engagement.

## COMPENSATION & BENEFITS

The Town of Orono is offering a competitive salary of $120,000 to $150,000 for this role commensurate with experience and qualifications. The organization's comprehensive benefits package includes health, vision, dental, and short-term disability insurance; paid holidays; and generous vacation and sick leave accrual policies. Employees also benefit from a wellness program, gym membership, and access to medical flex spending, health reimbursement, and dependent care accounts.

Orono participates in the MainePERS PLD Plan AC, featuring a 6.95% employee payment and 10.2% employer contribution. The Town also offers a 457 deferred compensation plan through Mission Square.

## APPLICATION PROCESS

Please apply online

For more information on this position, contact:

**Lissa Barker, Senior Vice President**
LissaBarker@governmentresource.com
817-266-0647

*The Town of Orono is an equal opportunity employer and service provider that celebrates diversity and is committed to creating an inclusive environment for its employees and those they serve. Applicants selected as finalists will be subject to a comprehensive background check.*

## RESOURCES

**Town of Orono**
orono.org

**Orono Town Manager**
orono.org/294/Town-Manager

**Community Survey Results Factsheet**
orono.org/DocumentCenter/View/12307/Town-Manager-Search-Community-Survey-Factsheet---Results

**Orono Economic Development**
orono.org/199/Economic-Development

**Bangor Region Chamber of Commerce**
bangorregion.com

**Orono Tourism**
visitmaine.com/places-to-go/the-maine-highlands/orono

**Agreement for Executive Recruitment Services ("PROJECT")**
**to City of De Pere, Wisconsin ("CLIENT") between**
**CLIENT and Strategic Government Resources, Inc. ("SGR")**

SGR and CLIENT (together, "Parties") agree as follows, effective upon the date of the later signature below, in consideration of the mutual promises contained in this Agreement and other good and valuable consideration, the sufficiency of which each Party hereby acknowledges.

**1. SGR promises and agrees:**

A. To perform the services described in SGR's Proposal for PROJECT dated April 23, 2024 ("PROPOSAL") substantially in the timeframe projected in the PROPOSAL.

B. To honor the Placement Guarantee stated in the PROPOSAL.

C. To comply with all applicable open records, public information and similar laws, and consult with CLIENT if SGR is asked for information before disclosure, unless prevented by court order or law from doing so.

**2. CLIENT promises and agrees:**

A. To pay SGR promptly as billed or invoiced for such services in accordance with the amounts stated in PROPOSAL, including Reimbursable Expenses and costs of any Supplemental Services or Other Expenses that CLIENT selects. Balances that are unpaid after the payment deadline are subject to a fee of 5% per month or the maximum lawful rate, whichever is less, on the owed amount every month, charged monthly until the balance is paid.

B. To timely provide photos/graphics and information necessary to develop recruitment brochure, narrow candidate field, and conduct candidate screening and interviews; failure to do so may, in SGR's reasonable discretion, extend timeline and can negatively impact the outcome of the process.

C. To respond to drafts of documents and reports in a timely manner; failure to do so may, in SGR's reasonable discretion, extend timelines and can negatively impact the outcome of the process.

D. To refer all prospective applicants to SGR and not to accept applications independently during the recruitment process.

E. To provide legal opinions to SGR regarding when and if any information relating to the PROJECT must or should be released in accordance with public information laws or legal process.

F. That if CLIENT receives an open records request, CLIENT shall notify and share the request with SGR in writing as soon as possible but within no more than three (3) business days of receipt and that CLIENT shall provide sufficient time for SGR to notify and provide advance notice to the impacted individuals prior to CLIENT releasing the required information with protected information redacted.

G. To directly reimburse finalists for travel-related expenses relating to in-person interviews.

H. That CLIENT is ultimately responsible for candidate selections and CLIENT will not discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation,

national origin, disability, marital status, or any other basis that is prohibited by federal, or applicable state, or local law.

I. To comply with the Fair Credit Reporting Act.

J. To cooperate with SGR to enable SGR to perform its obligations to CLIENT.

3. **Additional Terms and Conditions:**

A. The PROPOSAL is incorporated herein for all purposes including all terms defined therein, but if there is any conflict or inconsistency between the terms or conditions of this Agreement, this Agreement controls.

B. SGR may substitute personnel other than those initially placed, who have substantially equivalent training and experience and subject to approval of CLIENT, due to factors such as SGR employee/consultant turnover, developing needs of the PROJECT, or CLIENT's request.

C. CLIENT grants SGR permission to use any name, logo, or other identifying mark of CLIENT in SGR's social media content to refer to the relationship established by this agreement.

D. Remedies

i. CLIENT can terminate this agreement at any time for no reason upon giving SGR seven (7) days advance written notice of the termination date. In such an event, SGR shall be compensated for all work satisfactorily performed up to and through the termination date.

ii. SGR can terminate this agreement upon seven (7) days advance written notice of the termination date to CLIENT if CLIENT has failed to promptly pay in full any undisputed portion of any bill or invoice (if the dispute is in good faith) or has failed to perform its contractual promises in a manner that materially impedes SGR's ability to perform. In such an event, SGR shall be compensated for all work satisfactorily performed up to and through the termination date.

E. CLIENT acknowledges that the nature of executive recruitment is such that SGR engages in discussions with prospects through the process who may or may not ultimately become a candidate, and that SGR is utilizing its proprietary network of relationships to identify and engage prospective candidates, and that premature release of such proprietary information, including names of prospective candidates with whom SGR may be having conversations as part of the recruitment process, may be damaging to the prospects, CLIENT, and SGR. Accordingly, CLIENT acknowledges and, to the extent permitted by law, agrees that all information related to this search is proprietary, and remains the property of and under the exclusive control of SGR, regardless of whether such information has been shared with CLIENT.

F. There are no third-party beneficiaries to this Agreement.

G. If any term or condition of this Agreement is invalidated by final judgment of a court of competent jurisdiction or becomes impossible to perform, the Parties will confer about whether to continue performance without amending the Agreement, without prejudice to either Party's right to terminate the Agreement without cause.

H. This Agreement embodies the complete and final understandings, contract, and agreement between the Parties, superseding any and all prior written or verbal representations, understandings, or agreements pertaining to this PROJECT. This Agreement can be modified

only by signed written amendment. Electronic communications purporting to amend this Agreement will be effective only if the electronic communication includes specific reference to this Agreement or PROJECT.

I. This Agreement will be governed by the substantive laws of the State of Wisconsin without regard to the jurisdiction's choice-of-law doctrines. Venue for any litigation relating to this Agreement will be exclusively in Brown County of the State of Wisconsin.

J. To the extent it may be permitted to do so by applicable law, CLIENT does hereby agree to defend, hold harmless, and indemnify SGR, and all officers, employees, and contractors of SGR, from any and all demands, claims, suits, actions, judgments, expenses, and attorneys' fees incurred in any legal proceedings brought against them as a result of action taken by SGR, its officers, employees, and contractors, providing the incident(s), which is (are) the basis of any such demand, claim, suit, actions, judgments, expenses, and attorneys' fees, arose or does arise in the future from an act or omission of SGR acting within the course and scope of SGR's engagement with CLIENT; excluding, however, any such demand, claim, suit, action, judgment, expense, and attorneys' fees for those claims or any causes of action where it is determined that SGR committed official misconduct, or committed a willful or wrongful act or omission, or an act or omission constituting gross negligence, or acted in bad faith. In the case of such indemnified demand, claim, suit, action, or judgment, the selection of SGR's legal counsel shall be with the mutual agreement of SGR and CLIENT if such legal counsel is not also CLIENT's legal counsel. A legal defense may be provided through insurance coverage, in which case SGR's right to agree to legal counsel provided will depend on the terms of the applicable insurance contract. The provisions of this paragraph shall survive the termination, expiration, or other end of this agreement and/or SGR's engagement with CLIENT.

K. Notices related to this Agreement will go to the respective Parties as follows but either Party can change the addressee for notices to that Party by written notice to the other Party.

   i. For the purposes of this Agreement, legal notice shall be required for all matters involving potential termination actions, litigation, indemnification, and unresolved disputes. This does not preclude legal notice for any other actions having a material impact on the Agreement.

   ii. Any notice required be given by this Agreement shall be deemed to have been given within three (3) days of emailing or depositing in the mail.

**Legal Notices:**

**SGR**
Attn: Melissa Valentine, Corporate Secretary
PO Box 1642
Keller, TX 76244
Melissa@GovernmentResource.com

**CLIENT**
Attn: _____
Address: _____
Email: _____

**PROJECT Representative:**

**SGR**
Jeri J. Peters
President of Executive Recruitment
JJPeters@GovernmentResource.com
817-337-8581

**CLIENT**
Name: _____
Title: _____
Email: _____
Phone: _____

**Billing and Invoicing:**

**SGR**
Attn: Finance
Finance@GovernmentResource.com
817-337-8581

**CLIENT**
Name: _____
Title: _____
Email: _____
Phone: _____

L. Unless sooner terminated, this Agreement shall terminate at such time as the PROJECT is completed and the requirements of this Agreement are satisfied, except that duties of payment, of information disclosure, any representations and warranties, and placement guarantee survive this Agreement.

M. The Parties and each individual who executes this Agreement on behalf of a Party represent and warrant to the other Party that as to each Party's respective signatory, that signatory is authorized by their Party to execute this Agreement and to bind their Party hereto.

N. Time is of the essence to this Agreement.

O. This Agreement may be executed in counterparts which together will comprise the Agreement.

P. This Agreement is subject to appropriation of funds by CLIENT.

**Strategic Government Resources, Inc.**

_____
Signature

Printed Name: Jeri J. Peters

Title: President of Executive Recruitment

_____
Date

**CLIENT**

_____
Signature

Printed Name: _____

Title: _____

_____
Date

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **Common Council** |
| **FROM:** | **Anthony Wachewicz** |
| **SUBJECT:** | **Consideration and Possible Action on Regulation of ATV/UTV's on City Streets. *** |

**ATTACHMENTS:**

- Letter from Ald Carpenter- ATV-UTV (PDF)
- Town of Lawrence ATV-UTV Regulations (PDF)

To: Larry Delo

From: Dan Carpenter

Subject: ATV/UTVs

For finance meeting

Here is a copy of Town of Lawrence ordinance for ATV/UTVs

I would like to see if the City would entertain doing this for all City Streets south of South Bridge

Thanks
Dan

# ORDINANCE 2021-003 OF THE TOWN OF LAWRENCE, WISCONSIN TO CREATE SECTION 275 ARTICLE IV REGULATION OF ATV/UTVs

The Town Board of Supervisors of the Town of Lawrence does ordain as follows:

**Section 1:** Town of Lawrence Ordinance Chapter 275 – Traffic Control - is hereby Amended to Create Article IV – Regulation of All-Terrain and Utility-Terrain Vehicles to read as follows:

## CHAPTER 275 – VEHICLES AND TRAFFIC, ARTICLE IV - REGULATION OF ATV/UTV

### 275-21 - Regulation of All-Terrain/Utility Terrain Vehicles on Town Streets

(1) **General Authority.** Pursuant to the provisions of, except as otherwise specifically provided in this Section, Chapter 23.33, Chapter NR64 Wis. Admin Code and Chapters 340-348 of the Wisconsin State Statutes, the operation of ATV/UTV, as defined in subsection (2) herein below, shall be permitted on all Town roads except County Trunk Highways D, F, EE, EB, S, U, or any trunk interstates.

(2) **Definitions.** The definitions prescribed in Sec. 23.33(1), Wis. Stats., shall apply to this Section; and, as used in this Section, the following terms shall have the meaning indicated:

a. **"All Terrain Vehicle"** ("ATV") shall mean a motorized vehicle as more particularly defined in Section 340.01(2g), Wis. Stats.

b. ***"Utility Terrain Vehicle"*** ("UTV") shall mean a motorized vehicle as more particularly defined by Section 22.33(ng), Wis. Stats.

c. ***"ATV/UTV ROUTE"*** shall mean road, street or right-of-way designated for use by ATVs or UTVs by the Town.

d. ***"ATV/UTV Routes"*** shall mean all streets in the Town of Lawrence are open to ATVs/UTVs unless specifically prohibited below and or designated signage indicating the street is closed to ATV/UTV traffic. The ATV/UTV Route Map is attached hereto and incorporated herein. This corridor on public property or on private lands subject to public easement or lease, designated for use by ATV/UTV operators by the governmental agency having jurisdiction. This excludes ATV/UTV from operating on roadways, County roads, or highways, those roadways that are seasonally not maintained for motor vehicle traffic, and any private road, driveway, or private property in the Town.

(3) **State Driver's License Required.** No person may operate an ATV or UTV on any Town street unless they hold a current valid Driver's License and shall display that proof to a law enforcement officer upon request. Probationary licenses are prohibited.

(4) The Town shall retain the right to close any Town street to ATV/UTV operation for special events, street construction, repair, or any other needed closure without advance notice.

(5) **ATV/UTV Regulations.** No person shall operate an ATV/UTV on any Town road between the hours of 11:00 p.m. to 6:00 a.m. ATVs/UTVs that operate on the designated streets in the Town shall abide by all state traffic laws and those laws regulating ATV/UTV operation, including the following:

a. **Operate** in the extreme right-hand portion of the traveled part of the road and travel single file. Cruising is prohibited and described as running all or part of the length of the roadway multiple times, per day, back and forth, for any purpose other than departing or arriving at their residence, or place of business. When travelling on any route head and tail lamps must be illuminated.

b. **Speed limit:** shall not exceed 35 MPH or the posted Town speed limit, whichever is less.

c. **Registration:** ATVs/UTVs operated on Town streets/roads shall have current registration through the State of Wisconsin in accordance with Wisconsin State Statutes. Wisconsin registration number shall be clearly visible from the rear of the ATV/UTV.

d. **At all times:** while operating an ATV/UTV on Town streets, operators born after January 1, 1988, shall have passed an approved safety course.

e. **Closures:** The Town can close any ATV/UTV operation for nuisance issues.

f. **Hand Signals:** When operating an ATV/UTV under this Section, if the ATV/UTV has no turn signals and/or brake lights, the operator shall use hand signals when making turns or stopping.

g. **Liability:** No public or private landowner shall be liable for any property damage or personal injury sustained by any person operating or riding as a passenger on an ATV/UTV, or upon a vehicle or other device drawn by an ATV/UTV upon the public or private landowner's property, whether or not the public or private landowner has given permission to use the land, unless the public or private landowner charges a cash fee to the operator or owner of the ATV/UTV for the use of the property or unless damage or injury is intentionally inflicted by the landowner.

h. **Operators:** ATV/UTV operators must remain on an approved Town route. Upon failure to do so, Wisconsin DNR and other penalties will apply.

i. **Alcohol:** It shall be unlawful for any person to consume or have in their possession any open container containing an alcoholic beverage while operating or riding as a passenger on/in a ATV or UTV upon any public street, public way, public alley, or public parking lot within the Town.

j. **Alcohol or controlled substance:** No person may engage in the operation of an all-terrain vehicle or utility terrain vehicle on the streets of the Town or upon all premises held out to the public for use of their ATV/UTV whether such premises are publicly or privately owned and whether or not a fee is charged for the use thereof while under the Influence of an intoxicant to a degree which renders him or her incapable of safe operation of an all-terrain vehicle or utility terrain vehicle; while the person has an alcohol concentration of 0.08 or more or while the person has a detectable amount of a restricted controlled substance in his or her blood.

(6) **Additional ATV/UTV Operation Prohibitions.** The operation of ATVs and UTVs in the Town are subject to the following Limitations:

a. **School Hours.** ATVs and UTVs shall not be operated on any street where a school exists between 6:30 and 8:30 am and 2:00 and 4:00 p.m. on days when school is in session.

b. **Highways.** ATVs and UTVs may not be operated on the following streets, county roads, or interstate highways. (Not allowed on CTH D, F, EE, EB, S, U, or any trunk interstates is prohibited).

(7) **Traffic and Parking Regulation Compliance.** The operators of ATVs/UTVs on Town streets shall be subject to all applicable traffic and parking regulations.

(8) **Insurance Requirements.** No person may operate an ATV/UTV or allow another person to operate their ATV/UTV on any Town street unless the owner of the ATV/UTV has an active and current insurance policy in place that covers the owner, operator, and any passengers of the ATV/UTV. Insurance documentation must be kept with the ATV/UTV while operating on Town roads. The operator shall show proof of insurance upon request to a law enforcement officer.

(9) **Equipment Requirements.** ATVs/UTVs operated on Town streets pursuant to this Section shall have the following properly working equipment:

a. **Headlights.** One (1) or more properly functioning headlights that shall display a white or clear light and be visible from a distance of 500 feet.

b. **Taillights.** Properly functioning taillights that shall be red in color and be visible from a distance of 500 feet.

c. **Brakes.** Brakes in good mechanical condition.

d. **Seat Belts.** UTV passengers shall have their seat belts fastened as defined in sec. 347.48, Wis. Stats. And/or 23.33 (6)(i)

e. **Helmets** - ATV/UTV operators and passengers under 18 years of age shall wear protective headgear of the type required under Sec. 347.485 (1) (a), Wis. Stats. And/or 23.33(3G)

f. **Muffler System.** A fully functioning muffler system and such other related equipment or devices that preclude the operation of an ATV/UTV in such manner that noise emitted from the machine is louder than 96 decibels on the A scale dB(a)at 50 feet, measured in the manner prescribed in the reaffirmed 1998–07, Society of Automotive Engineers Standard J1287, entitled Measurement of Exhaust Sound Levels of Stationary Motorcycles.".

(10) **Implement of Husbandry.** Operators shall be permitted to operate an ATV/UTV pursuant to Sec.23.33 (4)(d)(5) if the ATV/UTV is an implement of husbandry or used exclusively for agricultural purposes.

(11) **Tires.** No person shall operate a ATV/UTV equipped with metal studded tires and/or tire chains on or alongside any Town road. Exception – May use tire chains while actively removing snow.

(12) **Penalties.** Any person found to have violated this subsection shall be subject to the penalties set forth in Sec. 23.33(13)(a), Wis. Stats., together with all applicable court costs and fees.

**275.22 ENFORCEMENT**

(a) **MOVING VIOLATIONS.** This Article, except non-moving violations, shall be enforced in accordance with the provisions of §345.20 to §345.33,Chapter §300 and §66.12 of the Wisconsin Statutes.

(b) **STIPULATION OF NO CONTEST.** The Chief of Police or Officer, designated by him, upon request of any person charged with a violation of any provision of this Chapter, after the issuance of a citation upon an official Wisconsin Uniform Municipal Citation and Complaint form prescribed by §345.11, Wis. Stats., may accept a signed stipulation of "no contest" as found on the uniform citation.

Said Stipulation shall be accompanied by the amount of penalty prescribed by the schedule of penalties established by the County Court for violations of the state traffic laws, as have been adopted by reference in Ord. #275-11 of the Municipal Code of the Town of Lawrence, WI.

**Section 2:** Severability

If any provision of this ordinance is found invalid or unconstitutional, or if the application of this Ordinance to any person or circumstances is invalid or unconstitutional, such invalidity or unconstitutionality shall not affect the other provisions or application of this Ordinance which can be given effect without the invalid or unconstitutional provision or application.

**Section 3:** This amendment to existing ordinances shall be effective upon passage and publication as provided by Law.

Dated at Town of Lawrence, Wisconsin on this 11th day of October, 2021.

TOWN OF LAWRENCE

Introduced by: Supervisor Brienen
Seconded by: Supervisor Farvour
Vote: 4 ayes
1 nay
0 abstain

Town Chairman, Lanny Tibaldo

Attest: _____
Town Clerk, Cindy Kocken

TOWN OF LAWRENCE OFFICIAL SEAL BROWN COUNTY, WIS.

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **Economic Development** |
| **FROM:** | **Quasan Shaw** |
| **SUBJECT:** | **Consideration and Possible Action on a proposed Purchase/Sale Agreement Terms for Enterprise Drive (Parcel ED-2077-1).*** |

**ATTACHMENTS:**

- FP Memo - May 01 2024 (DOCX)
- Heritage Enterprise Business Park Conceptual (PDF)

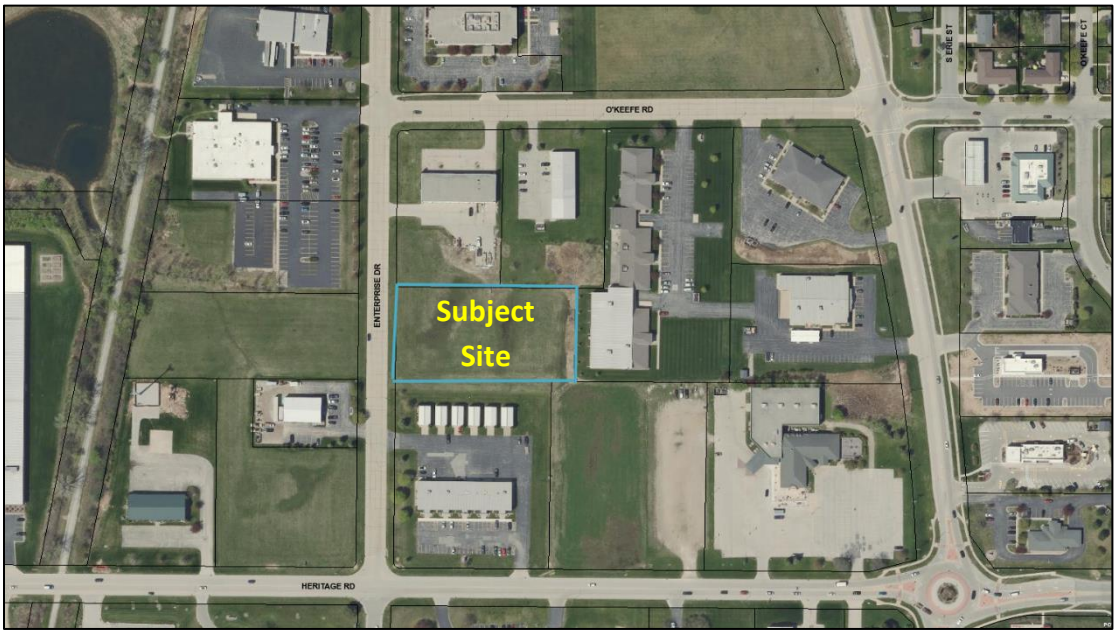
# CITY OF DE PERE
# MEMO

To: Finance and Personnel Committee
From: Quasan Shaw, Community and Economic Development Specialist
Date: May 14, 2024

RE: **Proposed Purchase/Sale Agreement Terms for Enterprise Drive (Parcel ED-2077-1).***

Tim Halbrook and Karen Classon, representing Tim Halbrook Builders Inc. (Developer) has an interest in acquiring parcel ED-2077-1 ("subject property"), a 1.731-acre parcel to construct twelve business rental units, each 48'x50' with small office, 0.5 bath and the remainder for workspace for a business facility. The property is located on Enterprise Dr (outlined in Figure 1 below) in the East Industrial Park and is zoned Business Park 1.

Figure 1:



**DEVELOPMENT PROPOSED TERMS**

| | |
|---|---|
| Parcel IDs: | ED-2077-1 |
| Address: | 1405 Enterprise Dr (recently assigned) |
| Acres: | Approximately 1.731 acres |
| Purpose: | Development of twelve (12) business rental units. |
| Development Agreements: | Developer (Tim Halbrook Builders) envisions that City of De Pere and Developer will enter into Sale and Development Agreement for the construction of the new business rental units. |

**Developer Obligations and Specific Provisions:**

The Developer shall:

1. Construct two (2) 14,400-square-foot buildings that will house twelve (12) business rental units totaling 28,800 square feet on the subject property.
2. Construct a building in accordance with the City of De Pere Zoning Code requirements and any other requirements by the Zoning Code or Plan Commission (landscaping, screening, façade materials, etc.) – site plan approval.
3. Compliance with all City codes.
4. Acquire City parcel ED-2077-1 at listed price of $40,000/acre (estimated 1.73 acres = $69,200).
5. Final purchase/sale agreement to be reviewed and decided upon by City Council.
6. Project completion (full assessment) by January 1, 2026.

**City Obligations and Specific Provisions:**

The City shall:

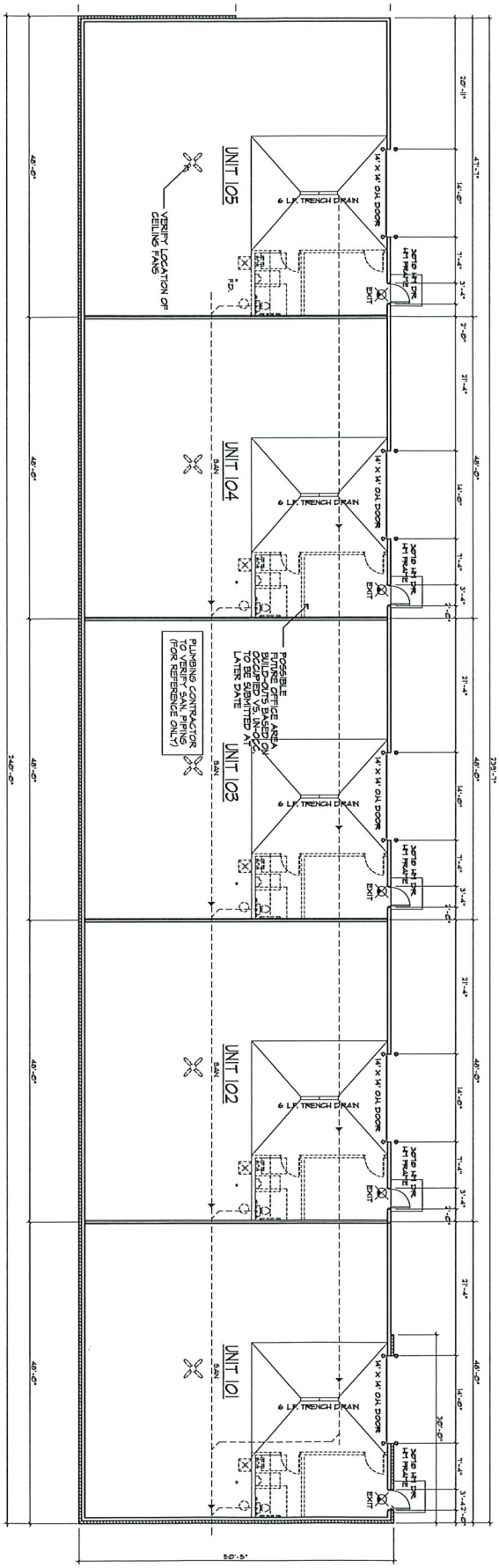
1. Record a deed restriction of no storage units allowed on property.
2. Sell parcel ED-2077-1 at listed price of $40,000/acre (estimated 1.73 acres = $69,200).

The following reviews are anticipated for this project:

Purchase/Sale Agreement Terms (Finance/Personnel Committee -May 14, 2024)
Site Plan (Plan Commission – target date May 28, 2024)
Purchase Sale Agreement (Common Council – June 4, 2024)

If the Finance and Personnel Committee approves the proposed terms, the City will draft a Sale/Development Agreement that will be reviewed by the Common Council at a future meeting. The Development Agreement will not be finalized until required land use and site plan approvals are secured.

Please contact me with any questions regarding this item.




BUILDING "A" FLOOR PLAN
BUILDING "B" MIRROR IMAGE

FLOOR PLAN
1/8" = 1'-0"

NORTH

PRELIMINARY - NOT FOR CONSTRUCTION

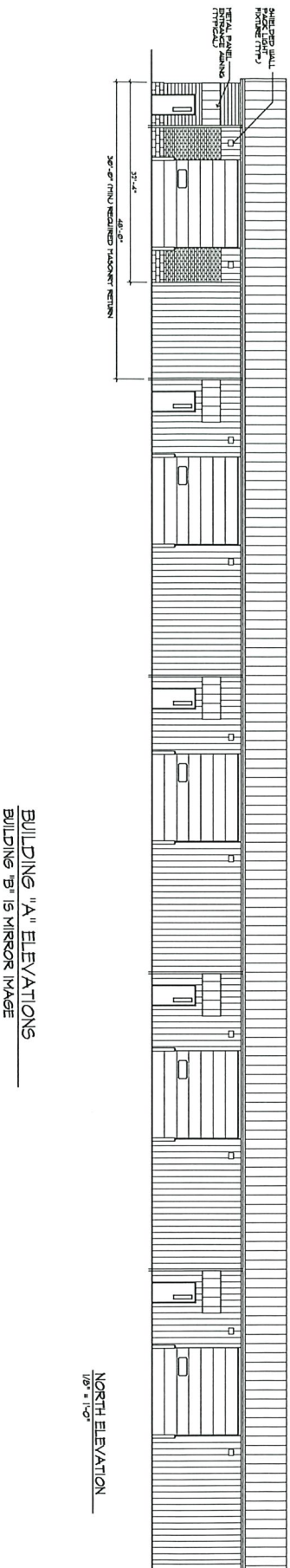
DATE 3/11/24
SHEET A1
PROJECT NUMBER 24124

PROPOSED BUILDINGS FOR:
TIM HALBROOK BUILDERS, INC.
ENTERPRISE DR. & HERITAGE ROAD
CITY OF DE PERE, WISCONSIN

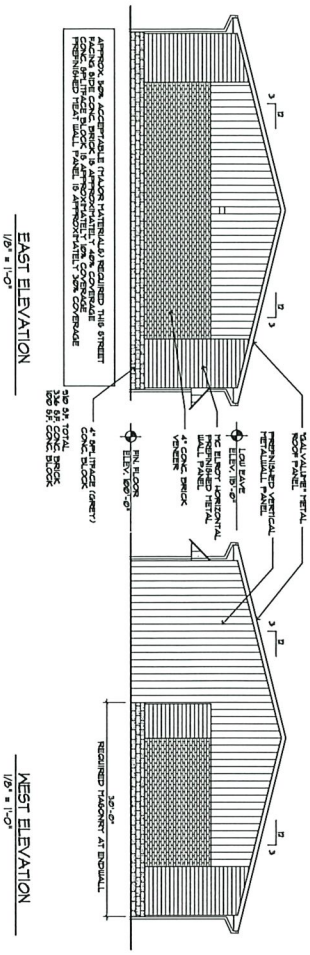
Design Consultant:
Concept One LLC
325 E. KALB AVE.
GREEN BAY, WISCONSIN
(920) 680-4060
eflsher.conceptone@gmail.com

Architect:
Daniel J. Meissner
AIA, LLC daniel.meissnerarch@gmail.com
1230 E. Calumet Street Appleton, WI
920.428.0982

| REV. NO. | DATE | DESCRIPTION |
|---|---|---|
| | | |

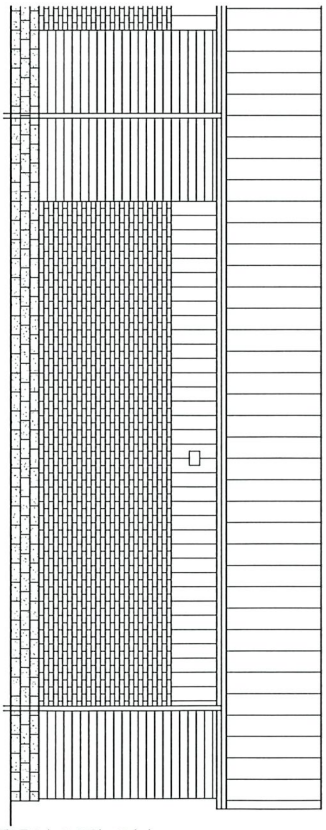



NORTH ELEVATION
1/8" = 1'-0"

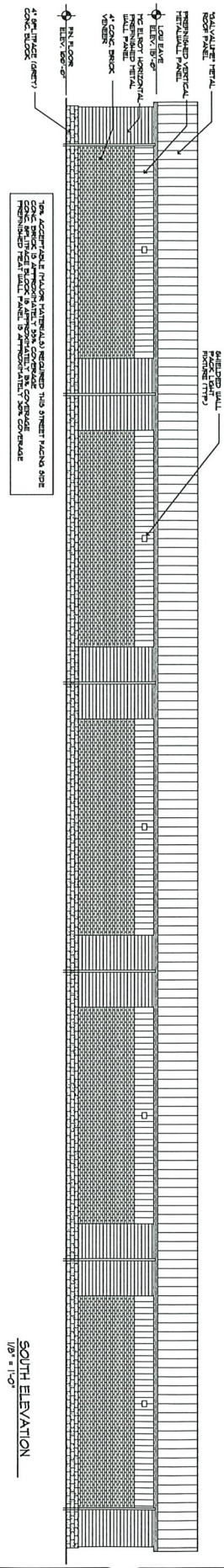



EAST ELEVATION
1/8" = 1'-0"

WEST ELEVATION
1/8" = 1'-0"



ENLARGED SOUTH ELEVATION
1/4" = 1'-0"




SOUTH ELEVATION
1/8" = 1'-0"

## BUILDING "A" ELEVATIONS

BUILDING "B" IS MIRROR IMAGE

PRELIMINARY - NOT FOR CONSTRUCTION

DATE 3/1/24
SHEET A2
PROJECT NUMBER 24|24

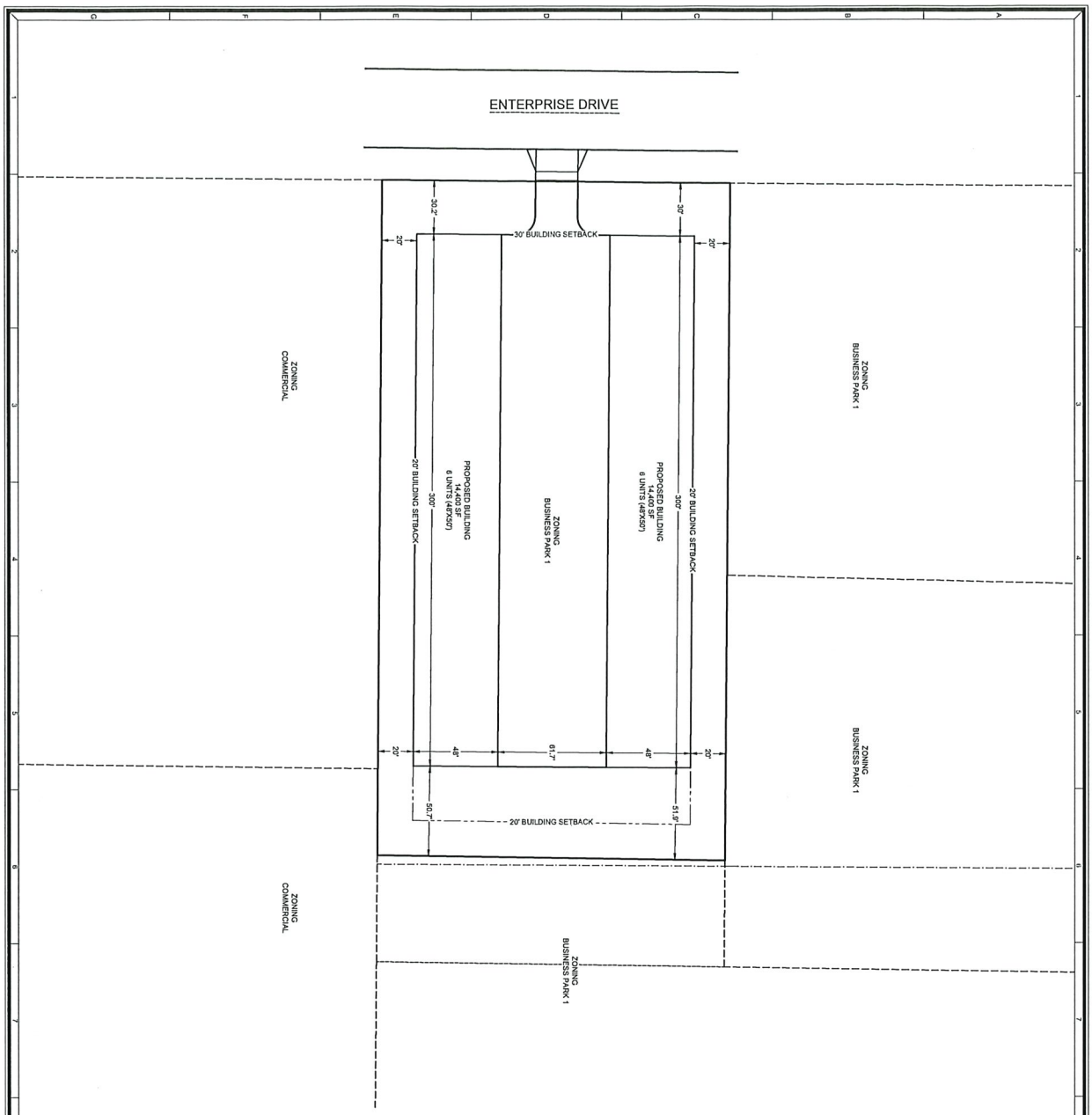
PROPOSED BUILDINGS FOR:
TIM HALBROOK BUILDERS, INC.
ENTERPRISE DR. & HERITAGE ROAD
CITY OF DE PERE, WISCONSIN

Design Consultant:
Concept One LLC
325 E. KALB AVE.
GREEN BAY, WISCONSIN
(920) 680-4060
eSther.conceptone@gmail.com

Architect:
Daniel J. Meissner
AIA, LLC daniel.meissnerarch@gmail.com
1230 E. Calumet Street Appleton, WI
920.428.0982

| REV. NO. | DATE | DESCRIPTION |
|---|---|---|
| | | |

R:\Proposals\2024\Halbrook\ED-2077-1 Parcel\Drawings\ED-2077-1.dwg 4/23/2024 3:59:11 PM




## SITE STATISTICS

| | |
|---|---|
| PARCEL ADDRESS: | ENTERPRISE DRIVE |
| PARCEL NUMBER: | ED-2077-1 |
| PARCEL SIZE: | 75,389 SF (1.731 AC) |
| ZONING: | BP-1 |
| EXISTING SITE | Area Square Foot (%) |
| GREEN SPACE: | 0.0 SF (0.0%) |
| IMPERVIOUS AREA | |
| BUILDING: | 0.0 SF (0.0%) |
| PAVEMENT: | 0.0 SF (0.0%) |
| TOTAL IMPERVIOUS: | |
| PROPOSED SITE | |
| TOTAL DISTURBED AREA: | 20% (15,078 SF) |
| GREEN SPACE REQUIRED: | 27,323 SF (36.2%) |
| GREEN SPACE PROVIDED: | |
| IMPERVIOUS AREA | |
| BUILDING: | 28,800 SF (38.2%) |
| PAVEMENT: | 19,289 SF (25.6%) |
| TOTAL IMPERVIOUS: | 48,089 SF (63.8%) |
| PARKING PROVIDED | |
| PARKING SPACES REQ'D/CALCS: | |
| PARKING SPACES PROVIDED: | |

GRAPHIC SCALE 30 15 0 30 60

| | | | |
|---|---|---|---|
| HALBROOK | | | |
| ED-2077-1 | | | |
| SITE LAYOUT | | | |

MACH IV
ENGINEERING • SURVEYING • ENVIRONMENTAL
2260 Salscheider Court Green Bay, WI 54313
PH:920-569-5765; Fax: 920-569-5767
www.mach-iv.com

| NO. | REVISION DESCRIPTION |
|---|---|

DATE: APRIL 23, 2024
DRAFTED BY: RPH
CHECKED BY:
PROJECT NO.: HALBROOK
DRAWING NUMBER
SHEET NUMBER
C1
OF 2

R:\Proposals\2024\Halbrook\ED-2077-1 Parcel Drawings\ED-2077-1.dwg 4/23/2024 3:59:15 PM

## SITE STATISTICS

| | |
|---|---|
| PARCEL ADDRESS: | ENTERPRISE DRIVE |
| PARCEL NUMBER: | ED-2077-1 |
| PARCEL SIZE: | 75,389 SF (1.731 AC) |
| ZONING: | BP-1 |
| EXISTING SITE | Area Square Feet (%) |
| GREEN SPACE: | |
| IMPERVIOUS AREA | |
| BUILDING: | 0.0 SF (0.0%) |
| PAVEMENT: | 0.0 SF (0.0%) |
| TOTAL IMPERVIOUS: | 0.0 SF (0.0%) |
| PROPOSED SITE | |
| TOTAL DISTURBED AREA: | |
| GREEN SPACE REQUIRED: | 20% (15,078 SF) |
| GREEN SPACE PROVIDED: | 27,323 SF (36.2%) |
| IMPERVIOUS AREA | |
| BUILDING: | 28,800 SF (38.2%) |
| PAVEMENT: | 19,266 SF (25.6%) |
| TOTAL IMPERVIOUS: | 48,066 SF (63.8%) |
| PARKING PROVIDED | |
| PARKING SPACES REQ'D/CALC'S: | |
| PARKING SPACES PROVIDED: | |

GRAPHIC SCALE
30 15 0 30 60

| NO. | REVISION DESCRIPTION |
|---|---|
| | |

DATE: APRIL 23, 2024
DRAFTED BY: RPH
CHECKED BY:
PROJECT NO.: HALBROOK
DRAWING NUMBER
SHEET NUMBER
C1 A
OF 2

HALBROOK

ED-2077-1

SITE LAYOUT WITH AERIAL

MACH IV
ENGINEERING • SURVEYING • ENVIRONMENTAL
2260 Salscheider Court Green Bay, WI 54313
PH:920-569-5765; Fax: 920-569-5767
www.mach-iv.com

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **Economic Development** |
| **FROM:** | **Quasan Shaw** |
| **SUBJECT:** | **Consideration and Possible Action to Award a Contract for Environmental Consulting Services with Stantec. *** |

**ATTACHMENTS:**

- Memo to FPC - May 14 2024 Environmental Services RFP (DOCX)
- Professional Environmental Consultant Services RFP 022024 (PDF)
- Stantec (PDF)

# CITY OF DE PERE
# MEMO

To: James Boyd, Mayor
Finance/Personnel Committee Members
From: Quasan Shaw, Community and Economic Development Specialist
Date: May 14, 2024

RE: **Consideration and Possible Action to Award a Contract for Environmental Consulting Services with Stantec.***

**Summary**
On February 5, 2024, the Development Services Department released for distribution a Request for Proposals (RFP) to qualified environmental services firms to assist the City in creating a Brownfield Program. Services provided will include:

- Task 1: Brownfield Program Development
- Task 2: Evaluation of Catalyst Brownfield Sites
- Task 3: Assessment, Remediation Planning, Onsite Remediation Work
- Task 4: Future Grant Application Support

City staff received a total of 7 RFP responses from the following agencies:

- Ayres Associates
- Cedar Corporation
- Fehr Graham
- Foth
- Robert E. Lee and Associates
- SEH
- Stantec

A review team of the City Administrator, City Attorney, Development Services Director, and Community Economic Development Specialist completed a review of the proposals and based on the content of the proposal and ability to accomplish desired tasks, the committee selected the proposal from Stantec Inc. to move forward as the environmental consultant.

**Timeline and Budget**
Stantec will provide Environmental Consulting Services to the City of De Pere for an estimated timeframe of 1 year, with extensions available for future years similar to other consulting agreements. The proposal includes the costs of each task for a total of $400,000.00, not expected to be expensed all within the first year.

**Staff Recommendation**
Recommend approval of the proposal from Stantec Inc. for environmental services as outlined in the RFP and forward the recommendation to the Common Council for approval.

# REQUEST FOR ENVIRONMENTAL CONSULTING SERVICES PROPOSALS:
# City of De Pere, Wisconsin

## Development Services Department

**Issued: February 5, 2024**

**Proposals Due: March 29, 2024 by 4:00PM**

# A. INTRODUCTION AND SUMMARY

Through this Request for Proposals (RFP), the City of De Pere (City) Development Services Department is seeking proposals from qualified professional environmental services firms to provide assistance with the creation of a Brownfield Property Acquisition and Remediation Fund (Brownfield Fund). The Common Council authorized the creation of a Brownfield Fund as a subset of the Revolving Loan Fund and has allocated funds to assist with Brownfield analysis and remediation efforts. The Brownfield Fund was designed for Phase 1 and Phase 2 assessments, grant applications, acquisitions, remediation planning, and if necessary assist with clean up. The Brownfield Fund should be limited to properties located outside a Tax Increment District or in tax increment districts that either do not have consulting expenses for Brownfields included in the project plan, have enough remaining years to recoup the Brownfield remediation expenses, or have surpassed the tax increment district expenditure period.

This RFP will be used to establish a list of qualified professional environmental consultants. Submissions must be received by the Development Services Department at City Hall, 335 S. Broadway, De Pere, WI 54115 no later than 4:00 p.m. on March 29, 2024.

The number and locations of Brownfields sites within the City include eight (8) priority properties and others that have or will be identified. One goal of the program is to develop a Brownfields Plan and inventory to promote effective planning by the City in implementing the Brownfield Fund program.

The City will award a contract to one (1) full-service firm to implement a Brownfield Property Acquisition and Remediation Program Fund. The initial contract may be extended at the option of the City.

# B. COMMUNITY OVERVIEW

The approximately 25,000 people who call the City of De Pere, Wisconsin home know that the community provides a high quality of life in the Greater Green Bay metropolitan area. The excellent schools, a dynamic downtown, successful business parks, and safe neighborhoods served by ample parks and natural areas have resulted in considerable loyalty and community pride among residents. The residences, businesses, and commercial areas are connected with a transportation and green space network that accommodates cars, bikes, and pedestrians. The beautiful Fox River is the focal point of the City Center, and the Claude Allouez Bridge unites the two sides of our dynamic downtown. Whether you are on the east side or west side, historic buildings thoughtfully blend with new redevelopment to provide a mix of housing, employment, shopping, dining, and entertainment.

# C. SCOPE OF WORK

This RFP is to solicit for a qualified environmental consultant who is expected to provide a wide range of environmental services to the City. The scope of work to be performed under this contract by the consultant is expected to include:

**Task 1: Program Development**

As part of this task, the consultant will work closely with the City to develop a Brownfield Fund Program to assess, cleanup, and redevelop brownfield sites within the City. The Brownfield Fund Program will take into consideration how existing funds should be utilized, identify and inventory priority sites, identify steps required to build a sustainable program, and how to leverage local funding to maximize State and Federal grant funding. This task is anticipated to evolve over time pending the needs of the City and as redevelopment opportunities arise. Expected product deliverable: Living work plan.

**Task 2: Evaluation of (8) Catalyst Brownfield Sites**

As part of this task, the consultant will review of existing project work, discussions with potential developers, establishing a timeline of probable next steps, identifying potential funding opportunities that align with project schedule, and creating an outline of proposed future work. The work will range from Phase I environmental site assessments (ESAs) to Remedial Action Plan reports that evaluate the types/extents of potential remediation needed to redevelop sites for industrial, commercial, and/or multi-family residential purposes. This task will also include preparing project Cut Sheets or other deliverables associated with the catalyst sites to assist the City in marketing the Properties. Further details below:

a) City parking lot 360 Main Ave. Expected product deliverable- Remedial Action Plan (Phase II complete).
b) City parking lot South Broadway St. Expected product deliverable- Remedial Action Plan (Phase II complete).
c) Joe's Service 400 Main Ave. Expected product deliverable- Remedial Action Plan.
d) Redevelopment sites along Southern Bridge route (4 sites). Expected product deliverable- Remedial Action Plan and Cut Sheets for sites.
e) G & G Rebuilders Inc. 2535 Lawrence Dr. Expected product deliverable- Remedial Action Plan and a removal, relocation, or condemnation plan.

**Task 3. Assessment, Remediation Planning, Onsite Remediation Work**

The majority of the program budget is allocated to Task 3 as uncommitted funds to support continued assessment, remediation planning, or onsite remediation work as identified at the target properties during Task 2 or at other Brownfield sites identified in the future. This portion shall require an additional scope of work under a master services agreement based off current rates.

**Task 4. Future Grant Application Support**

As part of this task, the consultant will work closely with the City to identify future Brownfield programs, grants, and opportunities with but limited to: United States Environmental Protection Agency, Wisconsin Department of Natural Resources, and the Wisconsin Economic

Development Corporation. This portion shall require a separate scope of work under a master services agreement based on current rates.

## D. SUBMITTAL QUESTIONS

All questions shall be submitted in written form to the contact information provided below by Friday, February 23, 2024. Answers will be provided via the City website as a part of addenda to the RFP as they become available. Multiple addenda may be released.

## E. Submission Requirements

The City wishes to evaluate each proposal under the same uniform review standards. Proposals for this project should be organized in the following order and contain all of the following information: Respondent shall submit one (1) electronic copy in PDF format through the City's online portal. In order to be considered, proposals must be received no later than 4:00 PM, Central Time, March 29, 2024 and delivered to:

Quasan Shaw
Community & Economic Development Specialist
qshaw@deperewi.gov
or
[De Pere, WI] RFP Application (seamlessdocs.com)

Proposals should include all of the following:

1. **Qualifications and Capabilities***:* This section shall include the firm's name, area of expertise, a brief history of the firm, size, number of office locations, and business address of the office responsible for the contract. The name, address, and telephone number of the contact person responsible for their submittal shall be included. In addition, the following shall be included:

    *a)* General description of firm's history providing brownfields services including grant writing and other related redevelopment funding and incentives.

    *b)* Experience of the firm in conducting Brownfield inventories, Phase I and Phase II ESAs, petroleum assessments, and subsurface site investigations under a U.S. EPA Brownfields Assessment grant, other governmental reimbursement and/or equivalent grant-funded programs.

    *c)* General description of the firm's services including experience for this contract in providing additional eligible assessment services including but not limited to: asbestos surveys, mold surveys, lead paint surveys, and wetlands and natural resource surveys.

    *d)* Summary of experience in redevelopment planning and market research activities related to Brownfield properties and site reuse.

*e)* Summary of experience in environmental/engineering/consulting experience with petroleum and hazardous contaminant Brownfield remediation.

*f)* Summary of experience Designing and maintaining Brownfield remediation strategies.

*g)* Summary of experience conducting community involvement and public engagement activities related to Brownfield program.

*h)* Ability to perform environmental inventories utilizing GIS in conjunction with U.S. EPA Brownfields grants. Knowledge and experience pertaining to EPA and DNR regulations shall be demonstrated.

2. **Technical Approach**: Description of the firm's technical approach to complete the tasks required of Brownfield projects including grant writing as described in the scope of work.

    *a)* Provide your understanding of this project and requirements as depicted in this document and identify key issues from the consultant's perspective.

    *b)* Provide a description of how your firm will manage and implement the site assessments and cleanup planning elements of the Brownfield Fund. Including the firm's approach and methodology to planning, organization, and management. Include how this approach is expected to achieve good results for this project.

    *c)* Address all scope of work issues and indicate how the consulting firm will go about assisting and coordinating the project with the City.

3. **Project Staff:** Description of the following:

    *a)* Brief biographical summaries of related experiences for staff members working on the project.

    *b)* Organizational chart.

    *c)* Resumes for key project personnel assigned to this project. Indicate the project manager who will be responsible for ensuring the project success.

4. **Budget:** Description of the following:

    *a)* Rates for Tasks 1 and 2

    *b)* Rates for Tasks 3 and 4

5. **Local Experience and Knowledge***:* Demonstrate local knowledge of the City and understanding of redevelopment and planning goals.

6. **References:** Project summary of relevant Brownfield experience and contact information for three (3) recent (completed within the past three years) client references with name, email address, and phone number for each.

## F. SELECTION PROCESS

The following describes the anticipated general review process.

1. Proposal review.
2. Staff recommendation to the Finance and Personnel Committee.
3. Common Council approval of the selected environmental consulting services firm.
4. Finalize/execute service contract.

## G. SELECTION CRITERIA

The selection process will involve the following primary steps. Applicants should carefully examine the entire RFP, any addenda, and all related materials and data referenced in the RFP. Applicants should become fully aware of the nature of the work and the conditions while performing the work. Each of the following review criteria will be taken into consideration in the evaluation of the proposals. The proposals evaluation will be weighted as shown below:

1. Completeness of Proposal: Extent to which completed proposal elements are submitted. (Maximum 10 points)
2. Professional Experience and Capacity: The extent to which the firm has demonstrated knowledge of project area and competence in creating and implementation brownfield programs and assessments. In addition, the firm has appropriate personnel, project experience, regulatory and scientific knowledge, equipment, and facilities to perform the scope of services to implement a Brownfield assessment program. (Maximum 45 points)
3. Project Methodology: The extent to which the firm has demonstrated their approach to manage and perform program implementation, reporting, and related activities. (Maximum 45 points)

The selection team will recommend an environmental consulting services proposal and firm to the Common Council based on the Selection Criteria.

The Common Council reserves the right to reject any and all proposals and select an environmental consulting services firm of their choosing. When a selection decision is made, the City expects to enter negotiations with the selected firm to complete a service contract. Upon approval and execution of a service contract, all other competing firms will be notified of the selection in writing. The City is committed to a cooperative working relationship with the selected environmental consulting services firm.

## H. TENTATIVE TIMELINE

The following is the conceptual timeline for the process (subject to change):

| | |
|---|---|
| Release of Request for environmental Consulting Services | February 5, 2024 |
| Written questions submitted to qshaw@deperewi.gov | February 23, 2024 |
| Reponses to questions available | March 1, 2024 |
| Submission deadline by 4:00 p.m. | March 29, 2024 |
| Follow Up Information and Interviews (if needed) | TBD, 2024 |
| Presentation of Proposals to Finance/Personnel Committee | April 9, 2024 |
| Recommendation to Common Council | April 16, 2024 |

## I. De Pere Resource Links

City of De Pere:
https://www.de-pere.org/

Comprehensive Plan, Downtown Master Plan, Cultural District Master Plan Historic Neighborhood Preservation Plan:
https://www.de-pere.org/egov/apps/document/center.egov?view=item&id=730

Zoning Code (Chapter 14):
https://library.municode.com/wi/de_pere/codes/code_of_ordinances?nodeId=PTIIMUCO_CH14ZOOR

Business Districts:
https://library.municode.com/wi/de_pere/codes/code_of_ordinances?nodeId=PTIIMUCO_CH14ZOOR_ARTVIIBUDI

General Requirements:
https://library.municode.com/wi/de_pere/codes/code_of_ordinances?nodeId=PTIIMUCO_CH14ZOOR_ARTXGERE

Design & Development Standards:
https://library.municode.com/wi/de_pere/codes/code_of_ordinances?nodeId=PTIIMUCO_CH14ZOOR_ARTXIIDEDEST

De Pere Municipal Ordinance:
https://library.municode.com/wi/de_pere/codes/code_of_ordinances

De Pere Chamber:
http://deperechamber.org/

Definitely De Pere:
http://definitelydepere.org/

# J. STATEMENT OF RIGHTS AND UNDERSTANDING

The City reserves, and may, in its sole discretion, exercise any and all of the following rights and options with respect to this RFP:

1. To accept, reject, or negotiate modifications to, any and all proposals;
2. Submission of a proposal does not bind the City to any action or any applicant;
3. To issue clarifications and propose addenda;
4. To modify any timeline;
5. To negotiate with one or more applicants;
6. To select any submission as the basis for negotiations and to negotiate with applicants for amendments or modifications to their submission;
7. To conduct investigations with respect to the qualifications of each applicant;
8. All materials submitted in response to this RFP become the property of the City;
9. Any proposal/response submitted in conjunction with this request will become public record;
10. The City is not responsible for costs associated with preparing proposals, or for cost incurred before a formal notice to proceed is issued if a contract is awarded;
11. No legal liability is assumed or shall be implied with respect to the accuracy or completeness of this RFP. This RFP has been prepared by the City and does not purport to be all-inclusive or to contain all of the information a prospective applicant may desire. No legal liability is assumed or shall be implied with respect to the accuracy or completeness of this RFP.

PROPOSAL
**3.29**
2024

Stantec Consulting Services Inc.

# REQUEST FOR ENVIRONMENTAL CONSULTING SERVICES

## City of De Pere

Stantec

# We help you realize the potential

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←
Monmouth Maple City Dairy
Prairie Hills Resource Conservation and Development, Inc.
Illinois

# 1. Qualifications and Capabilities

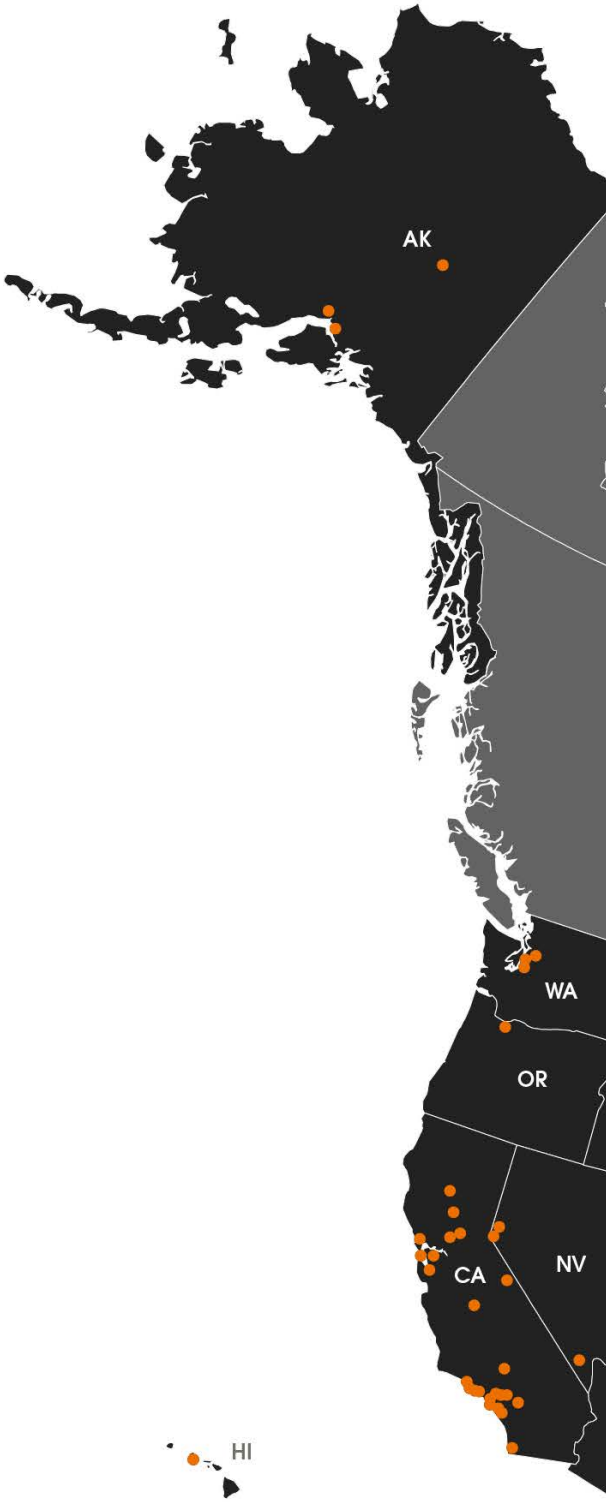
## We're active members of the communities we serve.

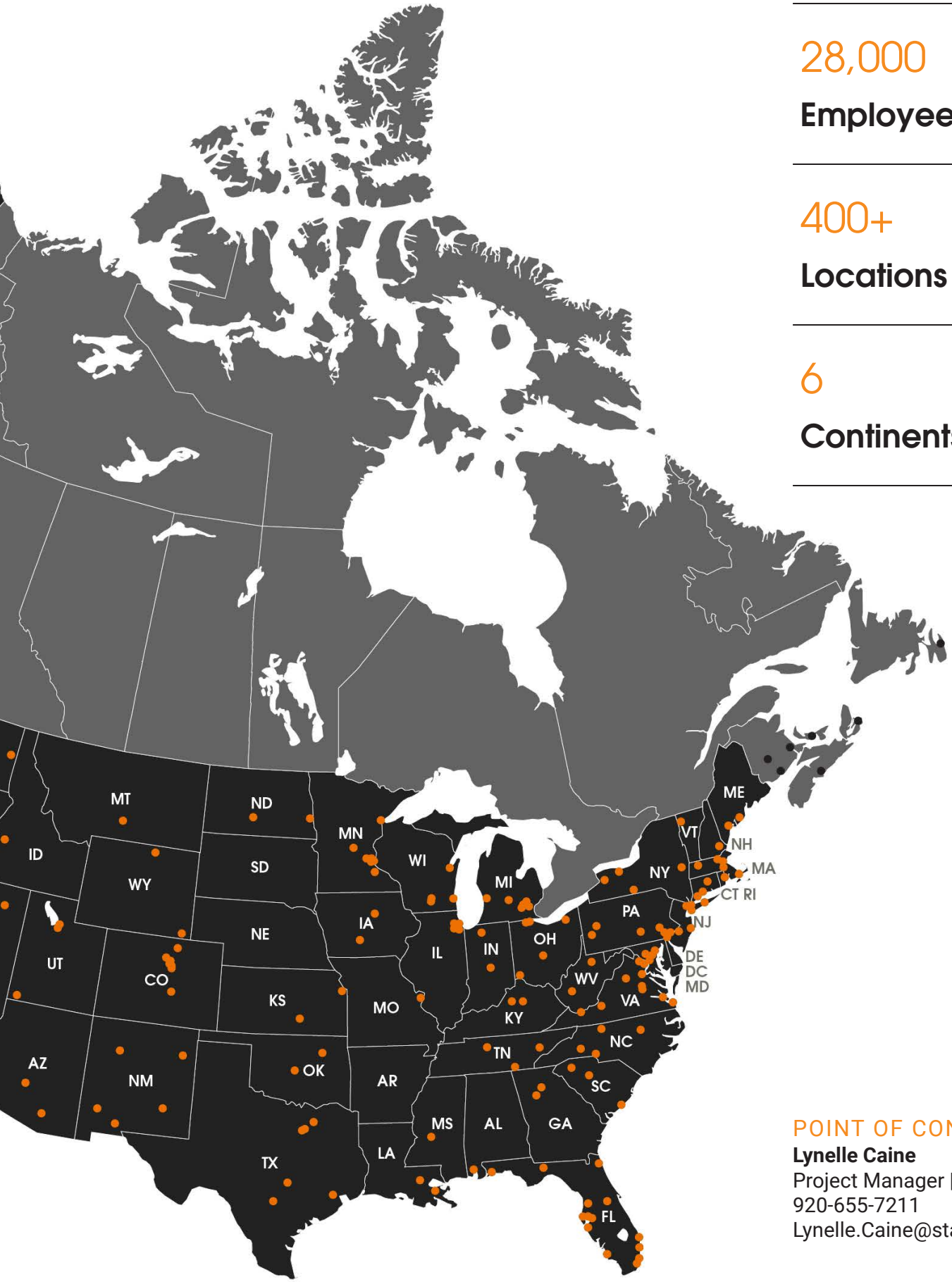
## That's why at Stantec, we always **design with community in mind.**

The Stantec community unites more than 28,000 employees working in over 400 locations across 6 continents. Stantec has been doing business in Wisconsin for more than 30 years and we have continued to grow by establishing long-term relationships with clients based on trust and integrity, and by committing to making a difference in the communities we serve.
We collaborate across disciplines and industries to bring buildings, energy, resource, and infrastructure projects to life. Our work—professional consulting in environmental sciences, planning, engineering, architecture, interior design, landscape architecture, surveying, project management, and project economics—begins at the intersection of community, creativity, and client relationships.

Since 1954, our local strength, knowledge, and relationships, together with world-class expertise, have allowed us to go anywhere to meet our clients' needs in more creative and personalized ways.

The Stantec team can leverage a multi-disciplinary in-house team of environmental scientists, planners and outreach specialists, engineers, health and safety experts, landscape architects and building architects, construction managers, as well as historical/cultural preservation experts. We will leverage this expertise to spur economic development, emphasize sustainability, increase the property tax base, and incorporate resiliency planning and design.






28,000

**Employees**

400+

**Locations**

6

**Continents**

POINT OF CONTACT
**Lynelle Caine**
Project Manager | Senior Associate
920-655-7211
Lynelle.Caine@stantec.com

# REALIZING THE POTENTIAL

We see brownfield sites differently, transforming them from liabilities into assets for you and your community.

**Undesirable. Risky. Cost-prohibitive.**
These are words often associated with brownfield properties. But what we see is opportunity to transform these sites into assets that revitalize communities and bring neighborhoods back to life.

Rather than focusing primarily on the initial environmental clean-up process, we approach brownfields as development projects. By incorporating remediation into the overall project, we save our clients time and money through all phases—from planning, funding, entitlements, and approvals, to design, construction, and maintenance.

Spaces once perceived as liabilities are now full of life and energy. Previously derelict land is now economically viable. And the value of once-thriving areas is reclaimed and carried forward for generations to come.

**Financing. Public health. Economic development. Job creation. Risk and liability. Community needs.**
These are all things municipalities must consider when faced with the decision of what to do with a brownfield site. For various reasons, municipalities can be left with properties that have declined over time and are no longer creating value. That's where we come in. We help communities reinvent themselves with programs to manage site re-use and revitalization now and into the future.

Stantec

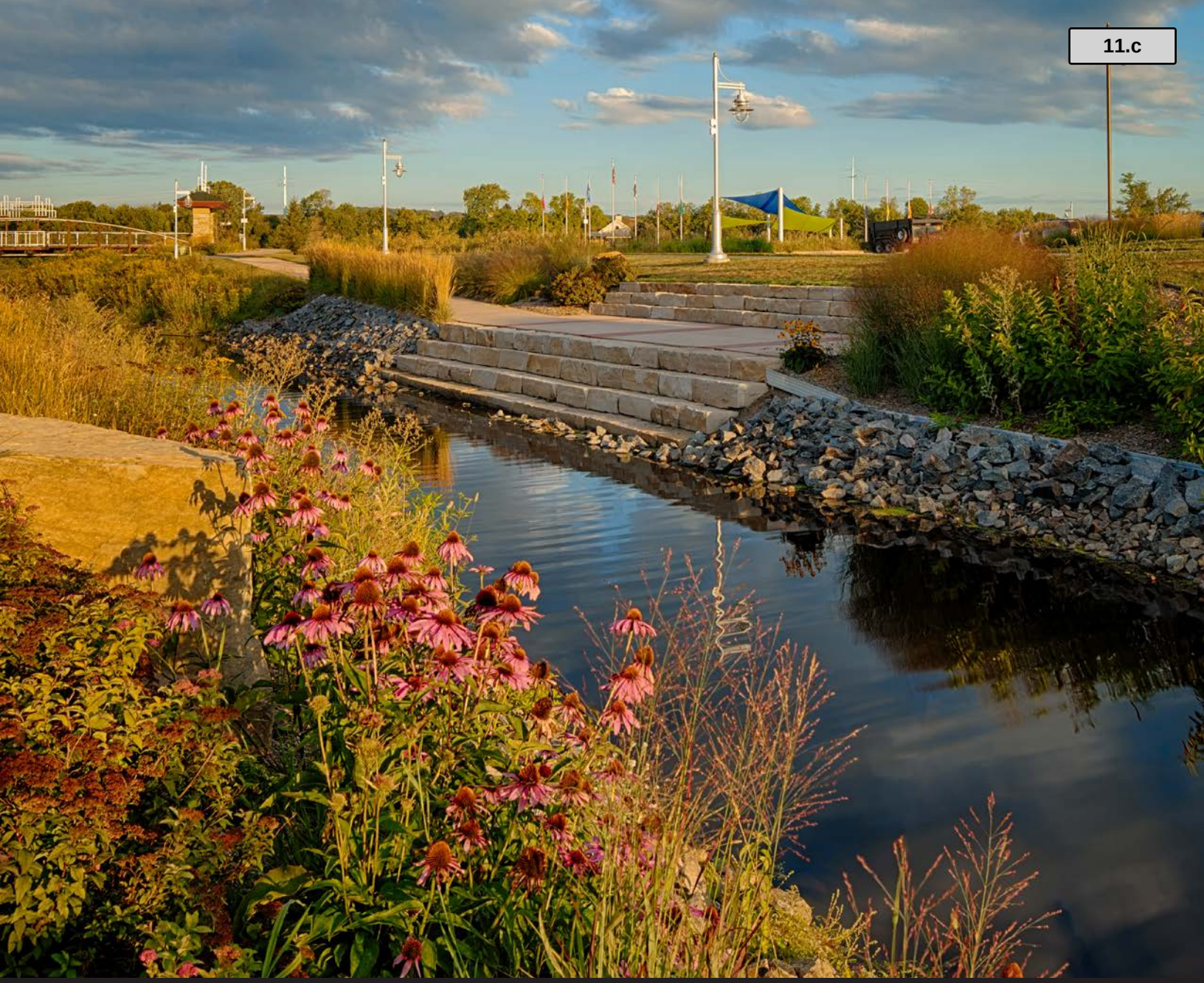
**Stantec has been proud to be a part of the De Pere Community since 2011**

Stantec Office Responsible for Contract

1165 Scheuring Rd, De Pere, WI 54115

## What can we do for you?

- Project feasibility evaluation
- Planning
- Environmental compliance and remediation
- Permitting and regulatory interface
- Civil engineering
- Architecture and building engineering
- Landscape architecture
- Geotechnical engineering
- Geomatics
- GIS



- Market research
- Transportation infrastructure and planning
- Public consultation
- Public funding support
- Facility decommissioning and transformation
- Construction management and administration
- Implement municipal and community vision
- Prepare site inventories and assessments
- Perform required planning and design
- Prepare applications for grant funding
- Position your site for redevelopment
- Implement your plan through all phases of development
- Real estate valuation
- Market and feasibility studies
- Land planning
- Project management
- Design services

# **1a.** When it comes to securing and implementing Brownfield grants, we are the experts.

Over the past decade, Stantec has assisted in securing and/or implementing more than 490 US EPA Brownfield Grants totaling nearly $200 million. Stantec has also assisted with hundreds of state and locally funded brownfield programs. We realize that brownfield redevelopment often requires layering funding from multiple federal, state, and/or local agencies.

Example federal funding sources could include US EPA, United States Department of Agriculture, and the Community Development Block Grant program. Example state funding sources could include programs run by Wisconsin Department of Natural Resources (WDNR) and and Wisconsin Economic Development Corporation (WEDC). Examples of local non-profit funding sources are the Fund for Lake Michigan and multiple local/ regional "Friends of" organizations. Additional examples of municipal funding include funds revolved through a City's Brownfield Cleanup Revolving Loan Fund, funds provided through a tax-increment financing district (TIF), or special funds set aside by a municipality for brownfield assessment and cleanup. Our broad experience in securing supplemental funding is unparalleled. Our experienced team provides clients with high quality, focused grant applications that meet the funding guidelines and tell a compelling story for revitalization.

## Preparing Successful Grant Applications

Each grant program is different; however, we have found that collaboration during grant writing always yields the most compelling applications. To truly reflect the voice of the community, we anticipate a significant collaboration with our clients, related coalitions, committees, and stakeholders, with various groups working on the text and providing ideas for improvement.

Often Stantec's primary role often is to prepare the grant text and cover letter, prepare/ assemble the appropriate attachments, complete the necessary forms, and submit the application on our client's behalf to funding agencies as specified in the grant guidelines grant applications. For example, US EPA grants are submitted through grants.gov. State grants are typically sent by email and a cloud-based server directly to the project manager.

## General Approach for Assessment Grant Applications

Stantec is intimately aware of brownfield and redevelopment challenges. For broadly funded grant applications (e.g., US EPA community-wide and coalition assessment grants), Stantec works with clients to identify focus areas to emphasize in the assessment grant application. When preparing a US EPA assessment grant we will focus on US EPA priorities, centering on areas with significant social, economic, and environmental disadvantages to present a strong case for funding. In addition, catalyst sites within each focus area that are identified for future revitalization in existing plans will be highlighted. For site-specific assessment grants (e.g., US EPA; WDNR WAM; WEDC SAG), we work to identify projects that align with agency funding priorities and develop scopes of work that align with allowable activities under each program.

## General Approach for Cleanup Grant Applications

Cleanup grants (e.g., US EPA, WEDC, WDNR) are unique in that the most compelling applications are for projects that are truly shovel-ready, with a redevelopment plan in place. Stantec works with clients during the assessment phase of projects to develop a funding timeline for keystone brownfields so cleanup grant opportunities align with the project redevelopment schedule.

Remedial planning and the scope of the cleanup grant are tailored in each instance to the proposed reuse and site redevelopment plans.

## Attention to Detail

One of the simplest, but most important strategies for preparing a successful grant application is paying careful attention to detail and responding explicitly to every criteria in the guidelines. The grant scoring process is often subtractive; therefore, minimizing points lost in each section is critical. Our systematic grant writing methodology is based on our brownfield team's experience submitting successful applications for more than 490 US EPA grants. The Stantec project manager and support team repeatedly review the criteria and instructions while writing and editing each draft of the application–focusing on completeness and clarity.

## Developing a Consistent and Compelling Story

Brownfield grant programs are becoming incredibly competitive. The Stantec team will work with clients to develop a unique combination of geographic, demographic, economic, and environmental factors that illustrate the challenges resulting from brownfield sites, and how addressing these needs will lead to a more resilient community.

These objectives will be woven into a larger storyline, with emphasis placed on the highest priorities (such as increasing tax base, eliminating blight, attracting investment, supporting job creation by local entrepreneurs, protecting the environment, etc.).

## QA/QC

Stantec has implemented a rigorous QA/QC process specifically tailored to federal, state, and local brownfield grant applications. This process includes a complete review by a senior-level expert, an independent review, and an administrative review. This three-step process occurs after the lead grant writer has prepared a complete draft and reviewed the entire application. Each reviewer reads the full application with a different focus. The senior reviewer focuses on factual details and guideline conformance; the independent reviewer evaluates the overall storyline for consistency in identified needs, goals, and priorities; and the administrative reviewer focuses on formatting, cross references, and completeness.

Brownfields in rural areas can be difficult to identify and even more difficult to investigate/redevelop. The former Quinney Plating Facility is a prime example of a County foreclosing on a significantly blighted property that posed an immediate threat to the health and safety of the community. Stantec worked to secure/stack a variety of grant funds to demolish the former structures and complete the environmental investigation at the property.

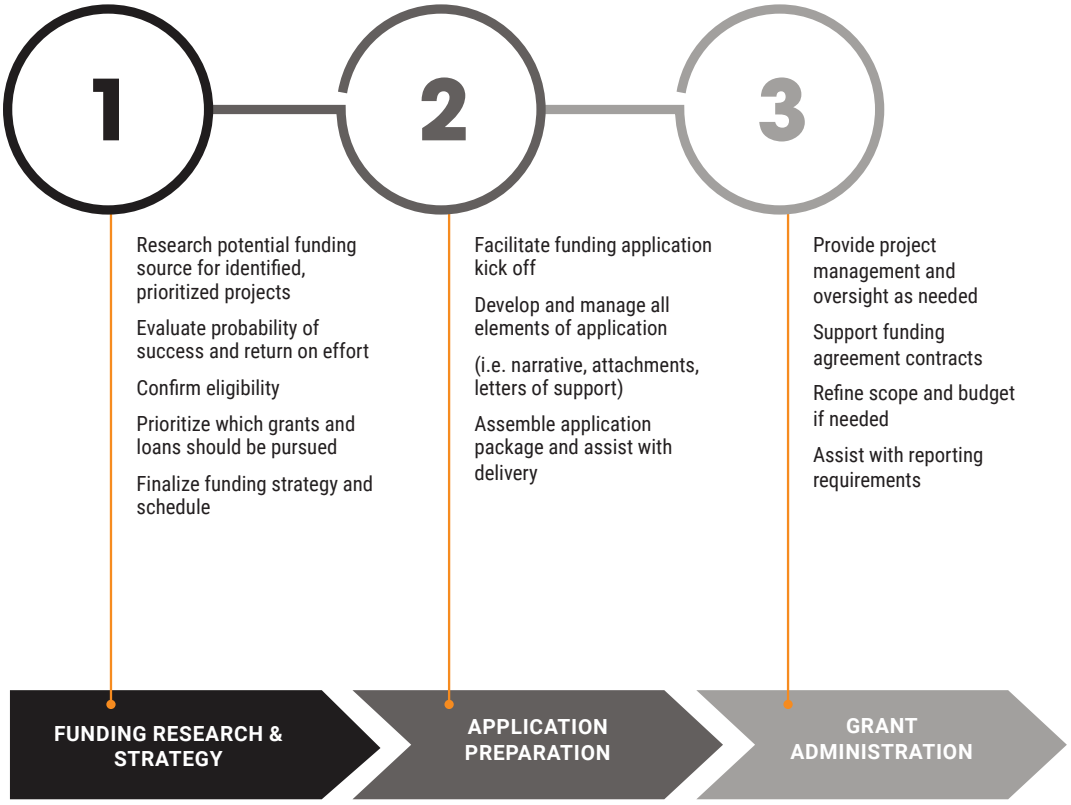
## Identifying Other Grants and Funding Sources for Communities

Stantec helps communities secure a variety of funding to achieve their project goals. Identifying a project is easy. Finding funding is not. Our team understands how challenging and time consuming it can be to identify funding sources—and navigate the application process. We recognize that securing funding is a critical component of executing projects that advance the quality of life in communities. For more than 30 years, Stantec has partnered with our clients to successfully apply for grants and loans that have helped our clients secure more than **$8 billion in funding.**

Funding services is a natural and complementary extension of the other technical and professional services we offer as a firm. With Stantec, from concept to construction you have an integrated team of resources at your fingertips—not only grant writers, but more than 140 funding experts, experienced financial consultants, urban planners, engineers, landscape architects, transportation designers, and geographic information systems (GIS) analysts.

We've compiled a team of Funding Advisors that have decades of experience developing financial plans and securing grants and loans for communities across the country. We have successfully leveraged our technical offerings into our funding services to create robust applications that 'Wow' funding agencies. With Stantec, you get all the services you need in-house.

We work with you to understand the projects that are most important to your organization and community. Whether it is a brownfield redevelopment, a new park, or water treatment plant expansion, our team can help you de-mystify the funding process. We act as a liaison between your team, funding agencies, and the public, helping you develop achievable funding strategies to turn your project plans into reality.




**140+**

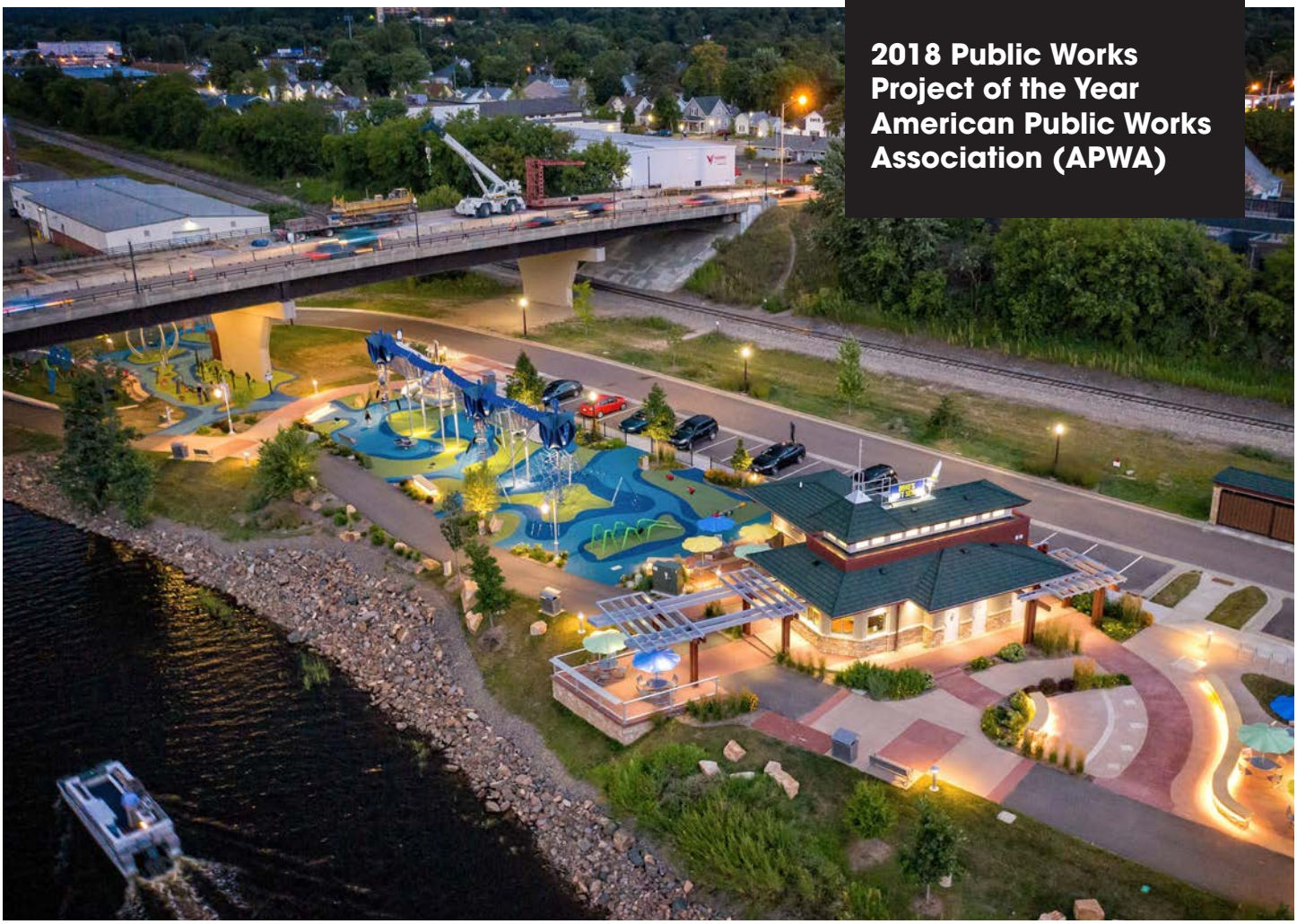
**Stantec funding experts across North America**

**100+**

**Funding programs leveraged to advance critical community projects**

**8B+**

**Secured in grant and loan funding for our clients**



**2018 Public Works Project of the Year American Public Works Association (APWA)**

We partner with you from the start, helping you identify and develop projects that include elements which are eligible for funding, and we work alongside you to develop successful grant and loan applications. We can help administer grants and loans and comply with funding and reporting requirements throughout the duration of a project.

## Stacking Brownfield and Other Grant Funding

When it comes to stacking, securing, and implementing grants, we are the experts. We realize that brownfield redevelopment often requires stacking and layering funding from multiple federal, state, and local agencies to achieve the anticipated outcome. Our broad experience in securing supplemental funding is unparalleled. One of the biggest challenges in securing WEDC assessment funding is the required "match." For example, by continually securing and using USEPA Brownfield assessment grant funding for the match, Stantec assisted a Wisconsin community in securing an additional four WEDC assessment grants totaling $435,500 to support continuing assessment work. The supplemental assessment funding was critical in securing a $250,000 WEDC Brownfield cleanup grant to support a multi-family redevelopment project; closing a brownfield cleanup Revolving Loan Fund (RLF) in 2021, securing a $500,000 USEPA brownfield cleanup grant in 2022; and is the basis for the community's recent $500,000 cleanup grant awarded in 2023. By stacking significant external funding, the redevelopment is leveraging well over $125,000,000 in private and public investment in property.

# **1b.** We have unmatched experience performing brownfield assessments in Wisconsin.

Stantec has provided brownfield assessment and redevelopment services in Wisconsin since 1988. We have exceptional experience conducting Phase I and II ESA activities at hazardous substance brownfields, petroleum brownfields, and other types of environmentally impaired sites. Stantec has completed more than 25,000 environmental projects in the Midwest alone. Our team has extensive experience relevant to designing and implementing effective and innovative brownfield remediation and reuse strategies.

This experience has resulted in a detailed knowledge of the US EPA and Wisconsin regulatory requirements as well as an excellent working relationship with staff at multiple state and federal regulatory agencies. Stantec has successfully obtained regulatory approvals for a broad range of beneficial reuses of both construction and demolition materials, as well as soil and fill materials containing elevated concentrations of one or more contaminants. Reuse of materials can save millions of dollars on larger brownfield sites associated with historic fill or other large-scale contamination sources, and can make the difference between successful redevelopment or long-term vacancy. We have significant experience in green and traditional remediation at brownfield sites ranging in size from residential heating oil tank excavations, to large industrial complexes and manufactured gas plants.

We are experts not only in assessment and cleanup activities but securing funding and strategic implementation of municipal and grant-funded Brownfield projects. We help our clients take full advantage of the opportunities presented by redeveloping brownfield sites to not only advance sites through the environmental due diligence process, but also in using grants and projects to strengthen our clients' long-term brownfields, economic development, and community revitalization programs.

## Brownfields Inventory

Stantec often creates or works with our clients and community members to create or expand an existing brownfields GIS database to identify potential brownfield properties in the community or project area. The inventory often includes windshield surveys, reviewing and incorporating information from federal and state databases into GIS, integrating new types of data into GIS (e.g., georeferenced Sanborn® Fire Insurance Maps, historic orthophotography) and point data (e.g., federal and state databases of known and potential brownfields).

## Prioritization of Brownfield Sites

Prioritizing properties for assessment is critical to leveraging the greatest benefit to the community. Stantec developed a semi-quantitative GIS-based scoring rubric we have found useful in prioritizing properties for assessment. Among other things, our rubric considers:

- Eligibility of the property for Brownfield grant funding
- Willingness of the property owner and potential purchaser to allow access to the property and follow program requirements
- Likelihood redevelopment will occur following assessment work

## Phase I ESAs

Stantec completes Phase I ESAs per the requirements of the All-Appropriate Inquiry Rule following procedures outlined in ASTM E1527-21. Stantec will work with potential purchasers to confirm appropriate due diligence is completed to qualify for a liability defense under CERCLA and we can issue reliance letters as needed. Work may also include coordinating with potential purchasers to obtain liability clarification letters from WDNR.

If underground storage tanks could remain onsite, a geophysical survey using ground penetrating radar and/or EMI techniques may be completed.

### Site Specific Sampling and Analysis Plans

Stantec develops site-specific sampling and analysis plans to assess environmental liabilities and recognized environmental conditions identified during Phase I ESAs. The SSSAPs will summarize methods used to complete investigations and will be submitted to the appropriate regulatory agency for approval. If warranted, SSSAPs will be written as a formal Site Investigation (SI) Workplan per Ch. NR 716 WAC to meet WDNR requirements

### Phase II ESAs and Supplemental Site Investigations

All work will be completed per the applicable SSSAP and/or ch. NR 716 SI Workplan following procedures described in Stantec's standard operating procedures or applicable QAPP.

Phase II ESAs are conducted per ASTM 1903-9. Supplemental Site Investigations are completed per Ch. NR716 WAC requirements. Copies of assessment deliverables are provided in electronic format to the client, current owner, in Stantec's standard operating procedures or applicable potential purchaser (if applicable).

## **1c.** Additional Assessment Services

Stantec has local staff in our De Pere office along with a team of subconsultants that can assist the City with additional assessment services.

### Asbestos, Lead-Based Paints Inspections, and Regulated Building Material Surveys

Stantec, with our subcontractor NorthStar Environmental Testing, LLC, has the experience of evaluating structures for the presence of asbestos containing materials (ACMs) as well as evaluating the presence and hazards of lead-based paint (LBP) and regulated building materials (RBMs).

RBMs may include, but are not limited to, building materials such as mercury-containing thermostats, switches, and fluorescent light bulbs; PCB-containing transformers; oil door closures; treated lumber; electronics; paints/solvents; and cleaning products. All Hazardous Building Materials Surveys (asbestos, lead bearing paint and restricted wastes) are completed by State of Wisconsin—certified subconsultants per ch. DHS159 WAC following WDNR Pub WA-651 for compliance with ch. NR 447 WAC.

If asbestos is found in a structure scheduled for demolition or renovation, we determine if the asbestos must be removed before these activities.

If there are ACMs that require removal, we obtain qualified contractor estimates for abatement. When the abatement has been completed, we perform clearance wipe sampling within 24 hours to ensure that the LBP hazard no longer exists and that the lead levels are below the allowable standards set forth by the appropriate regulatory agency.

Pre-demolition assessments can save time and money as they can determine and quantify environmental issues ahead of time before they cause delays. A typical pre-demolition assessment consists of an inspection to categorize the types of hazards present in a structure, and collecting and laboratory-analyzing samples to identify and quantify the types of each hazard. This information is used to determine the most suitable method to abate the hazard. Stantec is not a demolition contractor or an asbestos or LBP abatement contractor; however, we provide an independent assessment of the hazards that exist within any particular structure.

## Mold Surveys

Stantec is able to offer mold assessment services including air sampling to determine if there is evidence of mold amplification inside structures including characterization of the genera found and recommendations for remediation. Stantec is also able to assess structural elements for water intrusion including infrared visualization to identify construction materials that may be wet which provides a growth medium form mold, inductive and conductive analysis of building materials to identify possible wetting of those materials and surface swabs and wipes to assess potential mold colonies that are identified as part of the visual inspection of premises.

## Wetland and Water Resource

Stantec specializes in providing a variety of wetland and water resource services. Our experience includes work on municipal, utility, transportation, commercial development, residential development, storm-water management planning, natural resource management, habitat restoration, and other natural resource projects.

Stantec is experienced in the preparation and review of environmental assessment documents. Similarly, our staff has worked extensively with clients and regulators to develop and analyze project alternatives. This work is varied in scale and includes the Central Brown County Water Authority Pipeline project, the Brown County Wetland Mitigation project, DOT State Highway 10 reconstruction, Green Lake pier development, and more-modest projects like Prairie Hills Subdivision, Rice Lake Condominiums, or private land habitat restoration.

Our staff also has extensive experience identifying and delineating wetlands. Stantec's eight wetland delineators working out of our De Pere office complete hundreds of wetland delineations each year that encompass virtually every type of wetland found in the Great Lakes region. This is the first step to getting our clients the permits they need to construct their community development projects. With strong soils, hydrology, and plant identification skills, our staff understand the technical nuances of wetland mapping. Our De Pere office is also a leader in wetland and stream restoration to support our clients permit needs. We have created over 1,500 acres of wetland mitigation projects in Wisconsin and have numerous ongoing mitigation bank projects.

Stantec has 20 rare species specialists in Wisconsin that are trained in handling a variety of rare species issues ranging from insects to bats. We have performed Natural Heritage Inventory (NHI) screenings and related threatened and endangered species (TES) scoping on hundreds of projects throughout Wisconsin. Our staff are certified by the WDNR as NHI specialists with access to rare species data. We are very familiar with the NHI database and the sensitive data it contains. As such, we have used NHI data to design and perform biological surveys to investigate potential TES conflicts.

Where appropriate, we have completed consultations with WDNR and US Fish and Wildlife Service (USFWS) to address unavoidable impacts to TES habitats or individuals.

Where impacts to natural resources are unavoidable, Stantec provides the full range of restoration design, oversight, monitoring, and habitat management services. Our staff experience includes restoration of thousands of acres of wetlands, prairies, and woodlands throughout the Midwest region.

Our wetland restoration projects include design of isolated wetland basins, wetland mitigation banks, and waterfowl management flowages. Our prairie restoration experience encompasses native grassland and prairie on private lands as well as large tracts of public hunting grounds. Stantec staff has also designed woodland restoration and management projects that include timber harvest, stand improvement, and reforestation.

The District historical imagery, West Bend, Wisconsin

The District is being redeveloped into a mixed-use facility, West Bend, Wisconsin

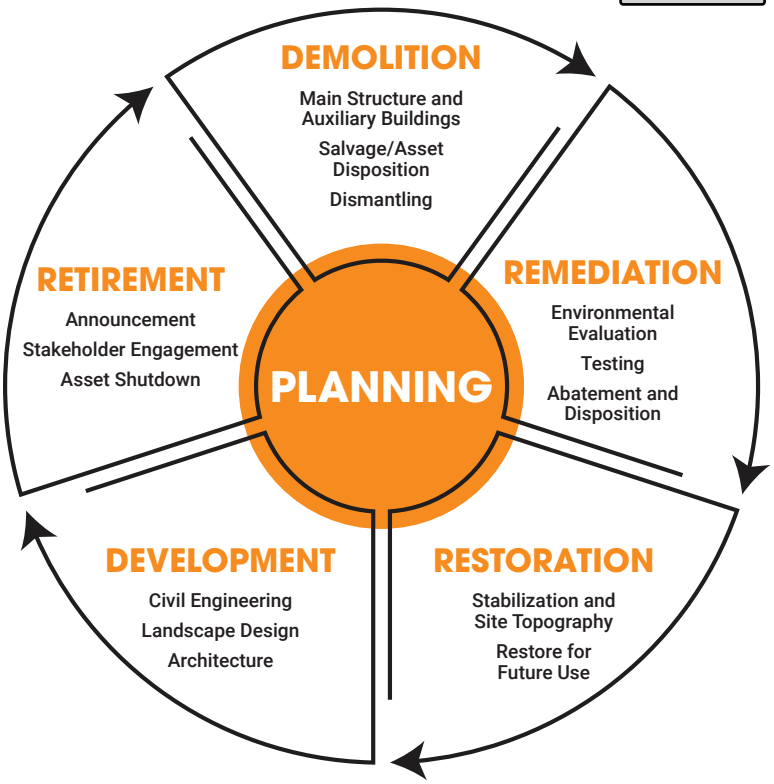
# **1d.** Through Redevelopment Planning and Market Research we turn Brownfields into Reinvestment Opportunities

Stantec approaches brownfields as revitalization opportunities where communities can transform vacant or underutilized property into a community asset. We can help navigate federal and state assistance programs, inventory sites, and manage implementation to reshape your community.

Often, these properties have remained idle due to fear of hidden environmental liabilities. Our nationally recognized brownfield grant experts view these not as costly cleanup jobs but as restoration/reinvestment opportunities to put properties back into productive reuse. Rather than focusing primarily on the initial environmental clean-up process, we approach brownfields as development projects. By incorporating remediation into the overall project and funding strategy, we save our clients time and money through all phases from planning, funding, entitlements, and approvals, to design, construction, and maintenance.

## Redevelopment Planning + Market Research

Brownfield assessment and cleanup grants represent a significant opportunity to plan the redevelopment of brownfield sites on an integrated basis. Our project team includes not only multiple experts in the environmental assessment of brownfield sites, but urban planners and market researchers with experience in redevelopment and revitalization of former brownfields sites. Our team also includes experts in urban design, civil and structural engineering, market analysis, economic development, environmental consulting, landscape planning, and architecture.




Approaching a brownfield assessment or cleanup program with a combination of both planning and environmental expertise results in superior project outcomes, as the environmental assessment process can be guided or focused with an understanding of site reuse options and requirements (placement of parking lots or roads with potential contamination). Planning for brownfields reuse is greatly enhanced when the project team has an in depth understanding of environmental constraints, and how these can impact decisions such as industrial vs residential use, construction of underground parking, placement of stormwater ponds, etc.).

Stantec's project team is recognized in the region for our deep experience in brownfield redevelopment plans. These plans are aspirational in terms of meeting local goals, but with our unusual depth in understanding development markets we ground them in the real world market context so that the proposed redevelopment vision meets a feasibility threshold, and is supported by clear direction about the critical steps needed for implementation.

We have completed six to eight brownfield redevelopment plans over the the past couple of years. One such project was in nearby Brillion, Wisconsin, where we supported the City and the property owner in creating a redevelopment plan for a nearly 145-acre former ductile iron foundry.

Our team can deliver an effective multidisciplinary approach to revitalizing sites, securing community input, assessing transportation and infrastructure requirements, and eliminating impediments to redevelopment associated with undefined environmental liabilities, lack of current or accurate market data, community opposition, related to access and infrastructure, or other factors.

## **1e.** Stantec brings a multi-disciplinary in-house team of experts to set the City up for long-term success.

Unlike other consultants that focus only on assessment or cleanup, Stantec brings environmental scientists, community planners and outreach specialists, engineers, health and safety experts, landscape architects and architects, construction managers, as well as historical/cultural preservation experts. We leverage this expertise to spur economic development, emphasize sustainability, increase the property tax base, and incorporate resiliency planning and design that revitalizes the community. We are also thoroughly experienced in performing assessment and cleanup in coordination with property redevelopment through use of multiple federal, state, and local grants while collaborating with public and private stakeholders.

Stantec has a broad spectrum of engineering knowledge and expertise, covering many disciplines. Approximately 25 staff are currently registered as professional engineers in Wisconsin. Stantec also has significant additional expertise in environmental services, with experts in a variety of disciplines available to consult on unexpected, unusual, or particularly challenging issues that arise related to individual brownfield sites.

## **1f.** We design and implement Brownfield Remediation strategies to fit your project and budget.

### Remedial Action Plans

Remedial action planning is the bridge between site investigation and redevelopment. You cannot have a successful redevelopment without this step.

Stantec balances the developers' needs and our client's redevelopment goals with regulatory compliance and overall cost. This is an area where significant cost savings can be realized. Following completion of a Site Investigation, a Remedial Action Options Report and/or an Analysis of Brownfield Cleanup Alternatives (ABCA) may be prepared per the requirements of ch. NR 722 WAC to plan for cleanup. A Remedial Action Plan may be prepared per the requirements of ch. NR 724 WAC for brownfields entering the remediation phase of redevelopment.

### Brownfield Cleanup

We have extensive experience remediating brownfield sites to achieve the redevelopment goals and ultimately obtaining site closure by regulatory agencies. As part of this task, Stantec will coordinate and oversee the implementation of the approved remedial action plans and coordinate all work with the City, developer, and construction contractors.

If applicable, Stantec may prepare a materials management plan (MMP) to manage excavated impacted soil on-site or a low hazardous exemption to manage impacted materials at a WDNR-approved off-site location, prior to the implementation of remedial activities.

Stantec personnel will oversee the remedial action activities through completion. Following completion of the necessary remediation work, Stantec will prepare a Remedial Action Documentation Report per the requirements of ch. NR726 WAC. The report will be submitted to the WDNR for final review and approval.

### Case Closure Request / GIS Registry and Continuing Obligations

Stantec will submit a case closure request, including documents for listing the property on the GIS registry of closed cases will be prepared at the conclusion of each project. Any requirements for continuing obligations will be documented and cap maintenance plans prepared. The package will be submitted to WDNR for final review/approval.

**Recent project examples of our environmental/engineering/conusulting exeperience with petroleum and hazardous contaminant Brownfield remediation are included in our References section.**

## 1g. We understand the importance of community outreach and public engagement.

### Community Outreach

We routinely inform, and include the public through a variety of fun, creative, interactive forums, small group discussions, and print/social media. We also have experience assisting steering committees and preparing presentation materials for project meetings and websites. Our team works hard to make sure all voices are heard, and communication of environmental, technical, and potential health issues is clear and relevant the parties these issues affect most.

For larger projects, community outreach activities may include development of site-specific community involvement plans and interviews/outreach with property owners.

Stantec staff are experienced in conducting a broad range of outreach activities as part of brownfield assessment, cleanup, and area-wide planning projects. These projects have included outreach activities, ranging from very basic community outreach meetings to far more complex public engagement involving multiple stakeholder meetings, charrettes, visual preference surveys, and concept plans. Stantec has completed hundreds of planning projects for which public outreach was a significant component.

**Public Engagement Tool Spectrum**

Our team offers a wide variety of public engagement methods, platforms, and tools that we can draw from to help support the project's community outreach.

| Controlled Environment | | | Mixed Environment | | | Open Environment | | |
|---|---|---|---|---|---|---|---|---|
| Online Surveys | Feedback Cards | Social Media | Live/Work/ Play Maps | Visual Preference Surveys | Bubble Boards | Storytelling | Stakeholder Interviews | Facilitator Exercises |
| E-mail Blasts | Door Hangers | WOM | Visioning Workshops | Charettes | Instant Polling | Walk/Bike Tours | Tactical Urbanism Events | Targeted Youth Workshops |

# **1h.** We have the knowledge and experience utlizing GIS and understanding of state and federal regulations to implement your project.

## GIS Capabilities

We are knowledgeable in the strategies for managing geographic coordinate data throughout all phases of assessment, cleanup, and redevelopment as they occur at many brownfield sites, and integrating these data with GIS.

Specifically, we have enhanced our Brownfield Inventories by incorporating new types of data in GIS (e.g., georefrenced Sanborn Fire Insurance Maps, historic orthophotography, inspection surveys) and point data (e.g. federal and state databases of known and potential brownfields). We have also encouraged municipalities to link final reports (ie. Phase I and II ESAs) to parcels within their internal GIS systems to make these documents readily available for staff and/or future employees.

## Federal and State Environmental Statutes or Associated Regulations

Stantec's experience with federal and state statutes/regulations is well documented. Our in-depth technical understanding of regulations includes nuanced criteria of the AAI Final Rule and ASTM 1527-21 and the requirements to investigate/remediate brownfields under ch. NR700 of the Wisconsin Administrative Code (WAC) while balancing waste regulations under ch. NR500 and ch. NR600 WAC.

We also have experience with the various provisions and requirements associated with the CERCLA.

This required detailed knowledge of the National Contingency Plan and other applicable US EPA guidance documents. As a contributing member to the WDNR Brownfields Advisory Committee, Dr. Harris Byers has detailed knowledge of state environmental regulations, assessment, and cleanup criteria. In addition, Stantec staff have a strong working knowledge of Resource and Recovery Act (RCRA) and Toxic Substances Control Act (TSCA) regulations.

We have performed investigation and remediation on numerous RCRA sites and have assessed and remediated PCBs subject to subject to TSCA, including the former Mirro property. With more than 200 staff based in our Wisconsin offices, Stantec has in-house experts knowledgeable in federal and state statutes, laws, or regulations pertaining to brownfield assessment, cleanup, planning, and redevelopment.

# 2. Technical Approach

## Our staff are familiar with the specific regulatory and programmatic requirements and how to effectively complete deliverables for brownfield grant projects.

Stantec has implemented numerous Brownfield Programs under the US EPA Brownfield grant program and we believe we can mirror this experience and establish a robust Brownfield Program for the City. The fundamental intent of the law that established the US EPA Brownfield program is to support small business growth through redevelopment of blighted properties.

Approximately half of our portfolio involves working with communities, small business, and small local/regional developers, many of whom are involved in their first brownfield redevelopment project. Our team fully understands the anxiety and concern that potential first-time purchasers (including communities going through the foreclosure process) have when confronting and planning around the challenges of a brownfield project. We work in close collaboration with potential purchasers to address any and all questions, working with the community to develop reasonable project schedules to increase the likelihood projects are successful. Our work follows the All-Appropriate Inquiry rule and WDNR requirements, so potential purchasers have great confidence our deliverables protect their liabilities. The value of this expertise is difficult to quantify–but compared to a developer walking away at the last minute from a project–the value of our expertise working with inexperienced purchasers/ developers is uncalculatable.

## **2a.** Project Understanding

We understand that the City of De Pere (the City) Common Council has authorized the creation of a Brownfield Property Acquisition and Remediation Fund (Brownfield Fund) as a subset of the Revolving Loan Fund and has allocated $400,000 to assist with Brownfield analysis and remediation efforts. As a result, the City is seeking a qualified environmental consultant to assist with the Brownfield Fund. Stantec has divided this work in the following subsequent tasks. Task 1: Program Development, Task 2: Evaluation of (8) Catalyst Brownfield Sites, Task 3: Assessment, Remediation Planning, Onsite Remediation Work, and Task 4: Future Grant Application Support.

We understand the project will be led by the City and supported by Stantec. The following sections lay out our qualifications, methodology, and typical brownfield services Stantec anticipates  providing as part of this project implementation.

Stantec has a deep understanding of federal and state agency requirements and a strong working relationship with US EPA and WDNR. Our goal will be to leverage our existing knowledge of US EPA and Wisconsin brownfield and regulatory programs to maximize your existing funding, while exploring other sources as we have done with other municipalities such as Green Bay, Ashwaubenon, Brillion, Wausau, Sheboygan, and Neenah, Wisconsin.

# **2b.** Management + Implementation Approach

There are many options for managing and implementing brownfield programs. Our approach is to act as an extension of our clients during the entire project, developing a project management and implementation plan that is best suited to the client's preferences, needs, and workload. Following contract award, a project kick-off meeting will be held between Stantec and the client to define this plan. During this meeting, we will also define the roles and responsibilities of Stantec and the City. We believe the key to a successful project is open communication between the client, Stantec personnel, and the appropriate regulatory agency or Stantec's project manager typically communicates with our clients on a weekly basis to discuss the status of ongoing projects and upcoming work. At minimum, a reoccurring monthly conference call will be conducted to discuss the project status.

We know the level of effort needed to complete brownfield assessment work on the most challenging brownfield properties. We also understand that the investment in brownfield sites is of little value to the community if the anticipated redevelopment outcomes are not achieved. Having partnered with numerous communities over the last decade, Stantec has developed an integrated approach to program implementation to maximize value to the community and achieve program outcomes. Our adaptable and innovative approach is flexible and allows for advances in the consulting industry.

## Aligning Project Objectives with Schedule and Funding Opportunities

The first step in the redevelopment process is setting reasonable schedules of the key project milestones. From there, we start aligning milestones with available funding opportunities so the schedule moves smoothly and funds arrive at the precise time.

An example of this strategy is the River Point district in Manitowoc where US EPA brownfield assessment funds were first used, then stacked with state assessment funds to finish investigation work. Cleanup grant funds were then immediately secured so redevelopment/reuse progressed on schedule.

## Managing your project

The Stantec Project Management Framework identifies the key tasks that will help you and your project team to manage risks and quality on a typical project. These tasks also represent the project requirements of our ISO 9001 Quality Management System.

**0** Prepare a proposal that includes a preliminary Project Plan including scope, project budget, resources, deliverables, and schedule. Conduct and document an independent review of the final proposal.

**1** Obtain written instructions to proceed and execute an approved written contract. Obtain written subconsultant agreements (if applicable).

**2** Prepare a Project Plan to an appropriate level of detail. Conduct and document an independent review.

**3** Establish hard copy and/or electronic project record directories and file project records accordingly.

**4** Complete a Health, Safety & Environment (HSE) risk management assessment and documentation for all projects involving field work.

**5** Monitor the Project Management Dashboard on a regular basis. Follow best practices for managing project financials, including time charges, work in progress (WIP), accounts receivable (AR), and estimates to complete (ETC).

**6** Obtain the client's written approval on scope of service changes in a timely manner.

**7** Conduct and document a quality review of all final* deliverables prior to issue.

**8** Conduct and document an independent review of all final* deliverables prior to issue.

**9** Close off the project financials and close out the project files.

### Collaborations Between Environmental and Engineering Disciplines

Our internal collaborative approach builds on over a decade of teamwork with our internal engineering disciplines (i.e., civil, structural, marine, etc.) and planners (e.g., landscape architects,building designers, etc.). This internal open collaboration allows for streamlined input from a wide range of technical disciplines to identify the most cost-effective and efficient approach to achieve a redevelopment objective.

An example of this approach was recently used on the Bellin Clinic project in Brillion, Wisconsin. After reviewing the project, our civil and structural engineers proposed the use of Geopiers, which saved the developer well over $500,000 compared to the external architect's recommended approach of typical perimeter foundation walls. In another Wisconsin project, our brownfield team worked in close collaboration with our civil engineer when establishing final grades to integrate reuse features as engineered barriers to minimize the amount of impacted historic fill that required excavation and removal from the Property. This approach **saved the community well over $90,000,000.**

Finally, Stantec routinely peer-reviews remedial plans developed by other consultants for developers of brownfield properties. In one case, the proposed remedial approach was technically infeasible, so we provided a remedial alternative that achieved the desired objective in a shorter period and **saved the developer $750,000.**

Occasionally, a developer may already have retained their own environmental consultant. Stantec openly collaborates with multiple regional and national firms when implementing Brownfield programs–as we recently did on a project for the City of Two Rivers, which **saved the developer $100,000 in costs and allowed redevelopment to begin on a shortened timeline.**

### Relationships with Developers + Subcontractors

Our exceptional brownfield experience allows us to leverage a wide network of highly skilled developers and builders/contractors to bring potential end users to the table if one does not already exist. Our prequalified list of subcontractors eliminates firms that do not have an exceptional safety record matched with impeccable technical skills. Having safe and experienced subcontractors saves budget by getting the work done correctly, the first time.

## **2c.** Stantec's methods and controls for Implementation and Addressing Scope of Work Issues

For each project, Stantec starts with a kickoff meeting with the client to establish objectives, tasks, budget, and schedules. If grant funding is obtained, activities under each funding source will be tracked under a separate project number with separate invoicing.

Schedule and budget are tailored as appropriate to meet project objectives and funding agency requirements. Stantec is often responsible for the management of approved budgets and schedules, site tracking, and management of subconsultants and subcontractors associated with brownfield projects. Stantec provides project specific status updates on a bi-weekly or monthly basis. We have found that open communication regarding the project status and findings avoids any scope of work issues and allows you to reallocate project goals and budgets as needed for priority sites. We provide updates by task in a letter with each invoice. Stantec prepares presentations as appropriate for community (e.g., Brownfield Advisory Committee, City Council, etc.) meetings providing updates on the implementation status of the City's and other funding programs and solicit input from the community on specific sites or revitalization needs. A detailed methodology of how each task will be implemented is included in the Project Budget section.

# Quality Control/Quality Assurance Process

- **Define Acceptance Criteria:** Define what "done" means, from no defects to satisfying code requirements and conforming to client's specifications.
- **Develop a Quality Management Plan (QMP):** Quality will be integrated into the project through the implementation of detailed processes and guidance contained in the QMP.
- **Utilize Quality Control Checklist:** Qualified reviewers utilize checklists at defined checkpoints to confirm that quality complies with the QMP and specifications.
- **Correct Work:** When a task does not meet the standards of the acceptance criteria, the work needs to be corrected. Correct the problem. Verify it meets the quality standards.
- **Prevent Future Deficiencies:** If a repetitive quality trend is detected, develop a Corrective and Preventative Action Report and adjust the QMP so it does not happen again.

# 3. Project Staff

## 3a. When it comes to implementing Brownfield Programs, we are the experts.

Our National Brownfields and Community Revitalization Program includes 75 senior-level brownfield specialists who routinely work with our local technical experts in offices throughout the US to deliver funding and implementation results to our diverse clientele. Environmental staff in our local DePere office have the resources to assist the City in implementing their Brownfield Program and leveraging additional grant funds to facilitate the redevelopment of catalyst sites.

What kind of team does it take to provide you with the right combination of enthusiasm, qualifications, and experience for this project? It takes a team that works together and is driven to achieve. At Stantec, we collaborate across disciplines to bring projects to life. We are ready to be your project partner and meet your needs in a creative and personalized way. The key members of our team bring a diverse background and experience related to US EPA brownfields, remediation monitoring, soil contamination, environmental management, documentation, and funding.

This combination of our unique strengths and passions, knowledge, and experiences makes it possible for us to deliver successful projects and advance the quality of life in our community.

Stantec has assembled a dynamic project team with exceptional expertise in implementing Brownfield Programs including securing federal, state, and local brownfield assessment and cleanup grants. The team has the experience and expertise needed to address the full range of technical, legal, financial, and other challenges associated with priority brownfields in the City.

### Certified Professionals

Stantec's professional geologists are all registered in accordance with the requirements of Chapter (ch.) GHSS 2 of the Wisconsin Administrative Code (WAC) or licensed in accordance with the requirements of ch. GHSS 3 WAC. Stantec's professional engineers are registered in accordance with the requirements of ch. A-E8 WAC. In addition to professional registrations, members of the team leading field work are all qualified environmental professionals (QEP), as that term is defined by the American Society for Testing Materials in ASTM 1527-21.

Stantec's contaminant hydrogeologists and brownfields staff all maintain appropriate Occupational Safety and Health Administration (OSHA) Hazardous Waste Operations and Emergency Response Standard (HAZWOPER) certified safety training. The team routinely works in the ch. NR 700 WAC rule series in Wisconsin, preparing reports for all phases of environmental assessment work in strict compliance with state requirements and Wisconsin Department of Natural Resources (WDNR) guidelines.

We work within the ch. NR500 and ch. NR600 WAC rule series in collaboration with solid and hazardous waste landfills to manage investigative derived wastes and wastes generated during cleanup of brownfield properties.

Stantec has strong working relationships with United States Environmental Protection Agency (USEPA) Staff in the Resource Conservation and Recovery Act (RCRA), Superfund and Toxic Substances Control Act (TSCA) programs.

## Assisting and Coordinating with the City

**Lynelle Caine** will serve as the project manager during the duration of the project and will be responsible for day-to-day management of project activities, coordination with the City, and addressing any issues that arise. **Evan Weber** will serve as the assistant project manager. Lynelle has successfully worked together with members of her team for more than 20 years writing and implementing brownfield grants including US EPA Brownfield Cleanup, US EPA Revolving Loan Fund, and WEDC Brownfield cleanup grants communities such as Green Bay, Ashwaubenon, Manitowoc, Neenah, Wausau, and Sheboygan.

Serving as our Quality Assurance/Quality Control (QA/QC) lead is **Stu Gross**. Stu is a professional geologist with 29 years of experience involving the investigation, remediation, and redevelopment of brownfields. Stu will complete a QA/QC review on all elements of the project to ensure consistency, clarity, and compliance. Our team's landscape architect/urban planners, **Sarah McDonald** and **Tom Leighton**, will apply their more than 37 years of experience in urban design and landscape architecture. Sarah and Tom will also help lead the public outreach initiative and will provide strategies to best engage the public when needed.

Resumes for our team including relevant project experience and years working on brownfields and key clients are included on in the next section. An organizational chart of team members, including subcontractors, their roles, and how they are organized is displayed on the following page.

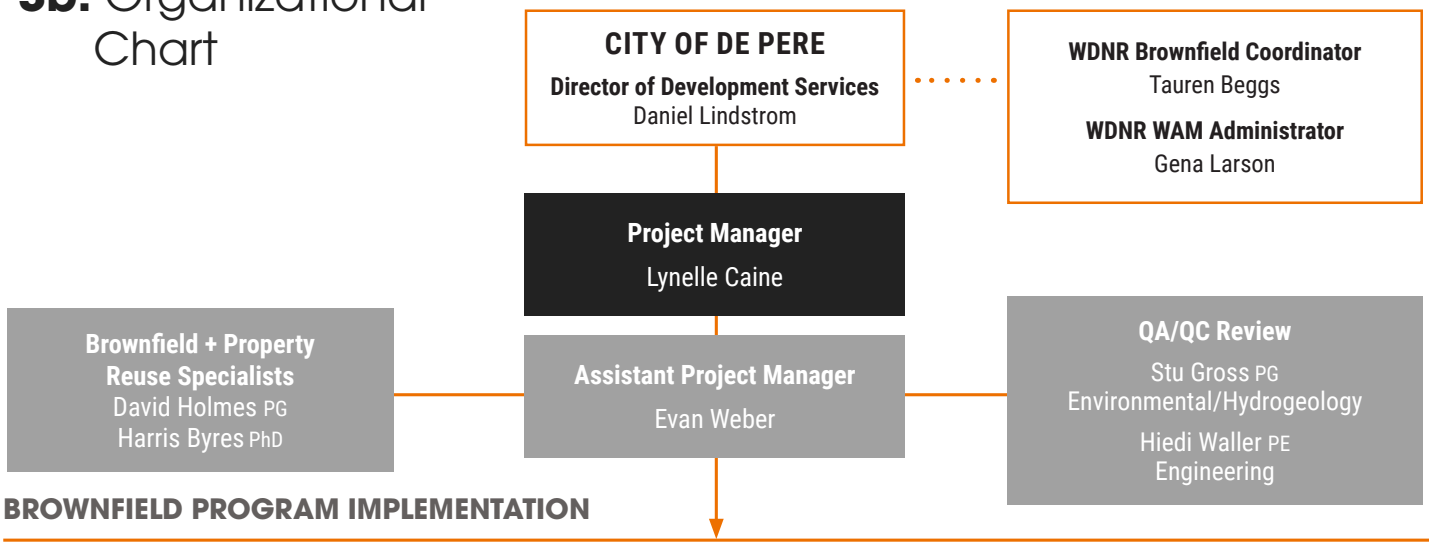
## Team Members and Related Project Experience

Across Wisconsin and nationally, our award-winning brownfield team has implemented hundreds of redevelopment projects. What we have learned is that each project is unique and the needs are very fluid depending on the funding sources, the community, the site conditions, infrastructure, and the environmental conditions. At Stantec we always operate with Community in Mind and are prepared to support the City of De Pere to make this project a success. Stantec has urban planners; landscape architects; recreational and sports designers; remediation and sustainability experts; wetlands, waterfront, and ecology scientists; architects; infrastructure engineers; and hundreds of other creative staff waiting to serve you. Please review our team's relevant experience listed below.

**PERSONNEL RELEVANT EXPERIENCE**

| Name/Role | Years of Experience | US EPA/ WDNR Program Requirements | QAPP, ABCA/ RAP, HASP, MMP | Remedial Design | Remediation Oversight/ Monitoring and Documentation | Site Assessment | Grant Management/ Reporting | Community Outreach |
|---|---|---|---|---|---|---|---|---|
| Lynelle Caine<br>*Project Manager* | 29 | ● | ● | ● | ● | ● | ● | ● |
| Evan Weber<br>*Assistant Project Manager* | 9 | ● | ● | ● | ● | ● | ● | ● |
| Harris Byers<br>*Brownfield + Property Reuse Specialist* | 20 | ● | ● | ● | ● | ● | ● | ● |
| Stu Gross<br>*QA/QC - Environmental/ Hydrogeology* | 29 | ● | ● | ● | ● | ● | ● | ● |
| Jeff Brand<br>*Phase I and II ESAs* | 22 | ● | ● | ● | ● | ● | ● | ● |
| Hiedi Waller<br>*QA/QC Engineering* | 34 | ● | ● | ● | ● | | ● | |
| Chris Hatfield<br>*Phase I ESA* | 28 | ● | ● | ● | ● | ● | ● | ● |
| David Holmes<br>*Brownfield + Property Reuse Specialist* | 37 | ● | ● | ● | ● | ● | ● | ● |
| Tyler Hischke<br>*Phase I ESA* | 4 | ● | ● | ● | ● | ● | | |
| Sydney Herman<br>*Phase I ESAs* | 1 | | | | | ● | | |
| Sarah McDonald<br>*Community Outreach /Reuse Planning* | 13 | ● | | | | | | ● |
| Tom Leighton<br>*Community Outreach /Reuse Planning* | 24 | | | | | | | ● |
| Paul Eickenberg<br>*Geotechnical Engineer* | 25 | | | ● | | ● | | |
| Yong Wu<br>*Geotechnical Engineer* | 21 | | | | | ● | | |
| Aaron Volkening<br>*Stormwater Engineer* | 23 | ● | | ● | | | | |

# 3b. Organizational Chart




## BROWNFIELD PROGRAM IMPLEMENTATION

### Program Development and Brownfield Prioritization
Lynelle Caine
Harris Byers, PhD
Stu Gross, PG

### Phase I ESAs
Lynelle Caine
Chris Hatfield, PG
Jeff Brand
Evan Weber
Tyler Hischke, PG
Sydney Herman

### Sampling Analysis Plans, Phase II ESAs and NR 716 Site Investigations
Jeff Brand
Evan Weber
Tyler Hischke
Hiedi Waller, PE
Stu Gross, PG

### Pre-Demolition Regulated Building Material Surveys
NorthStar Environmental Testing, LLC

### Remedial Planning
Lynelle Caine
Evan Weber
Jeff Brand
Hiedi Waller, PE
Stu Gross, PG

### Remedial Oversight, Closure Requests, and Continuing Obligations
Hiedi Waller, PE
Evan Weber
Stu Gross, PG
Lynelle Caine
Tyler Hischke
Sydney Herman

### Stormwater Management
Hiedi Waller, PE
Aaron Volkening, PE

### Reuse Planning and Community Outreach
Sarah McDonald PLA, CLARB, ASLA
Tom Leighton AICP, EDFP

### US EPA/WDNR/WEDC Grant Application Management
Lynelle Caine
Harris Byers PhD
Evan Weber

### Subcontractors (As Appropriate)
Geiss Soil Samples, LLC
NorthStar Environmental Testing, LLC
Eurofins TestAmerica Laboratories

### Geotechnical Services
**(As-Needed for Remedial Design)**
Paul Eickenberg, PE
Yong Wu, PE

# LYNELLE CAINE

Ms. Caine has more than 29 years of professional experience as an environmental consultant. As a Senior Project Manager/Senior Associate in Stantec's Environmental Service Business Sector, Lynelle specializes in revitalizing and redevelopment of abandoned and underutilized commercial and industrial properties by working closely with municipalities and private developers. These projects are performed under multiple regulatory programs including US EPA Region 5, Wisconsin Department of Natural Resources (WDNR), and the WDNR voluntary party liability exemption (VPLE) program.

With this experience, she is able to support local units of government with redevelopment of brownfield properties. This is done through assessment and remediation of environmental concerns and often helping procure federal and state grants and other funding sources to off-set the environmental cleanup costs often associated with these redevelopment efforts. In addition to brownfield redevelopment, Lynelle specializes in identifying and securing grants funds for local government units, private developers, community-based organizations, and non-profits by helping her clients identify strategic partnerships, strategize matching funds, and provide community outreach to engage public support. Lynelle has been the primary grant writer for a wide variety of projects securing funds under various state and federal grant programs including but not limited to Community Development Block Grants (CDBG); US EPA brownfield assessment, cleanup, and area-wide planning grants; and Wisconsin Economic Developments (WEDC) Community Development Investment (CDI) grant, Site Assessment Grant (SAG), IDLE Site, and Brownfield Redevelopment programs.

## Senior Associate
## Senior Project Manager

**EDUCATION**
BS, Saint Norbert University,
Geology, De Pere, WI, 1994

**CERTIFICATIONS**
OSHA
Health & Safety Training
for Hazardous Waste Operations,
8-hour Refresher, 2016

OSHA
Health & Safety Training
for Hazardous Waste Operations,
40-hour, 1994

**Brownfield Grant Writing, Various Clients, WI**
Lynelle has assisted in preparation of numerous successful State and Federal Brownfield grant applications totaling over $10 million to assess, investigate and cleanup brownfield sites throughout Wisconsin. These grants included the following:

**Municipal Clients**

- City of Green Bay: $2 million total in US EPA Grants in 2013, 2017, 2019, and 2020 which includes four US EPA Brownfield Community Wide Assessment (CWA) grants, one US EPA Brownfield Area-Wide Planning (AWP) grant, and one Revolving Loan Fund (RLF) grant. In addition, two WEDC Brownfield grants totaling $1 million for the Shipyard Redevelopment project.
- City of Green Bay Redevelopment Authority (RDA): $500,000 US EPA Brownfield Cleanup grant for the Shipyard Redevelopment Project.
- City of Neenah: $1.3 million if state funding for redevelopment of the former P.H. Glatfelter Mill Redevelopment Site which included two WEDC SAGs, 2 WDNR Ready for Reuse Grants; and one WEDC Brownfield grant. In addition, a $400,000 US EPA Brownfield CWA grant was also obtained.
- City of Stevens Point: $600,000 in brownfield assessment grant funds through two US EPA Brownfield CWA grants.
- City of Marinette: $400,000 in brownfield assessment grant funds through two US EPA Brownfield CWA grants.
- Village of Ashwaubenon: $37,500 in WEDC Brownfield SAG funds which led to private redevelopment along the Fox River.

**Private Developers/Other Entities**

- DDL Holdings (Rail Yard Innovation District), Green Bay, WI: Helped secure two WEDC Brownfield grants totaling $1 million for cleanup efforts of a multi-parcel 16 acre 100-year-old industrial property vacant for over a decade.
- Eight Street New Jersey, Sheboygan, WI: $350,000 WEDC Brownfield grant.
- GB Hotel, Ashwaubenon, WI: $497,000 WEDC Brownfield Grant
- Manseau Flats, Ashwaubenon, WI: $500,000 WEDC Brownfield Grant
- T-Wall Enterprises, LLC, Green Bay, WI: $500,000 WEDC Brownfield Grant
- Marinette County Association of Business and Industry, Marinette, WI: $500,000 WEDC Brownfield Grant

**Tecumseh Mill Demolition | City of New Holstein**
Lynelle assisted the City of New Holstein in obtaining two grants totaling $1.16 million (2021) for demolition of an abandoned 100-year-old mill that has sat vacant for over a decade. Not only did Lynelle help the City obtain a $250,000 WEDC IDLE sites grant and a $910,660 CDBG-CLOSE grant but strategized with the City to identify funding options to finance the remainder of the project through ER TIF and other resources.

**Brownfield Revitalization and Implementation Experience | City of Green Bay, WI (Project Manager)**
Lynelle worked closely with the City of Green Bay for nearly a decade and successfully helped the City obtain over $3.5 million in state and federal grant funds to revitalize brownfield sites throughout the City. One of Stantec's first significant projects in the City was the remedial oversight and closure of the former Younkers Department Store, which facilitated the construction of Hagemeister Park. Recently, she has worked closely with City staff and private developers to complete environmental assessment and cleanup in the downtown and surrounding areas to facilitate redevelopment, including the KI Expansion Center, the Metreau, City Deck Landings, Whitney School, former Larsen Cannery, Friar House Flats, and many more. Through these projects Lynelle worked closely with the City staff, design build contractors, architects and the general contractors.

**US EPA Brownfield Assessment Grant Implementation | City of Neenah, WI (Project Manager)**
Lynelle provided technical and management oversight for implementation of two US EPA Brownfield Assessment Grants for petroleum and hazardous substances awarded to the City of Neenah, Wisconsin. The grants were utilized to inventory Brownfield properties, perform environmental assessments, conduct remedial planning and assist with community involvement activities. As part of this grant, conceptual reuse alternatives and renderings were developed for key brownfield sites along the Commercial Avenue corridor taking into consideration environmental impacts.

US EPA grant funds have been critical in beginning redevelopment efforts within the City of Neenah to effectively reuse land once burdened by environmental impacts. Notably, five individual parcels were assessed under the US EPA assessment grant that resulted in the construction of Gateway Towers, a five story, 60,000-square-foot, multi-tenant office building downtown.

**Redevelopment of Larsen Green Cannery, Railyard Innovation District | Green Bay, WI**
Since 2014 , Lynelle has provided environmental services associated with the on-going redevelopment efforts with the Rail Yard Innovation District (Rail Yard) in Green Bay. The approximate 20-acre property was formerly part of a large canning facility referred to as the Larsen Canning Company. The Larsen Canning Company operated at the Property as a vegetable cannery until its closure in 2003. In support of cannery operations, the Property historically contained multiple large warehouses, support buildings, numerous railroad tracks/spurs, and a roundhouse. Stantec aided redevelopment through assessments, reuse and remedial action planning, remedial oversight, and helping obtain grant funding. Our team also designed a WDNR approved site-wide remedial action plan which allowed the beneficial reuse of low impact materials on and off site with a limited volume of soil being landfilled. Capping of the entire site with clean soil and/or an impermeable surface is the approved remedial alternative to address contaminant impacts at the Site. This plan has effectively saved hundreds of thousands of dollars through reduced trucking and soil disposal costs. Redevelopment activities completed to date include construction of townhomes, Broadway Lofts, and reuse of existing structures for commercial space and business offices with one separate housing unit currently under construction. Being located in an opportunity zone, the use of WHEDA tax credits and historic preservation tax credits were a few of the many financial tools used to fund the redevelopment efforts at the Site.

**Glatfelter Mill Redevelopment | Neenah, WI**
Since 2008, Lynelle has been the Project Manager leading the investigation and remediation at the Glatfelter Mill site. This project involved transforming a 16-acre site from an abandoned paper mill in the City's downtown to a catalyst mixed use redevelopment destination that includes the Plexus Global headquarters, a health care clinic, two market rate housing redevelopments, Gateway Plaza, Legacy Park, and the Plaza at Gateway Park (an outdoor ice rink and warming shelter). There were numerous challenges associated with redevelopment of this 130-year-old paper mill site that extended over periods of economic uncertainties. The huge size of the specialized mill buildings and the cost associated with their demolition were initial challenges. In order to reduce costs and to conduct the demolition in a sustainable manner that would maximize reuse of materials, three key strategies were implemented. First, basement floor slabs and foundation walls were left in place throughout a majority of the site to serve as engineered barriers to prevent direct contact with fill materials during construction, and to eliminate the waste of disposing of an enormous volume of material with little associated economic or environmental benefit. Secondly, following asbestos abatement, all inert demolition materials were segregated into materials with and without lead-based painted surfaces. The material without lead-based paint was crushed and reused as fill in portions of the site. Lastly, the pervasive ash fill material was capped with a two-foot clay cap or another impermeable material (e.g., asphalt or concrete) wherever a slab was absent. During redevelopment of other portions of the site approval was obtained to place excess ash fill and masonry containing lead-based paint in a screen berm on the adjacent Arrowhead Park. This resulted in significant cost savings the City and the developer. WDNR case closure of three separate WDNR cases has been granted with issuance of a certificate of completion under the VPLE program pending. After more than a decade of revitalization efforts, Lynelle is currently overseeing the final remedial efforts associated with the three remaining parcels that make up the former mill site totaling over $100 million in private/public investment at the Site.

# EVAN WEBER

During almost a decade at Stantec, Evan has contributed to the successful implementation of brownfield investigation and remedial techniques on project he is involved. Evan contributes to projects via the completion of Phase I and II Environmental Site Assessments (ESAs), site investigations, and remedial plans. He often manages contractors and conducts oversight to ensure projects are completed on time and budget while adhering to design specification. As a specialist working with contaminated properties, Evan enjoys collaborating with communities and stakeholders to put local brownfields into new, viable, and vibrant use through implementation of state and federal grants projects. As a part of the Stantec team, Evan's diverse knowledge and skills allow him to bring innovative perspectives to solve the challenges brownfields present. He knows we are all better together and looks forward to working with clients and colleagues to accomplish specific projects and tasks.

Evan provided field services and subcontractor oversight for multiple US EPA Brownfield Site Assessment Grants for petroleum and hazardous substances. Duties included preparation of Eligibility Determinations, Phase I and II ESAs, Site Specific, Sampling and Analysis Plans (SSSAPs), Health and Safety Plans (HASPs), street corridor surveys, and environmental assessment report preparation. Evan often takes part in client and regulatory agency interaction and the selection of remedial options for brownfield sites.

## Environmental Scientist

**EDUCATION**
BS, Earth Science
Marquette, Michigan, 2014

**REGISTRATIONS**
State of Wisconsin
Certified Pesticide Applicator

**CERTIFICATIONS**
HAZWOPER
OSHA, 8 Hour Refresh
Green Bay, Wisconsin, 2017

Health & Safety Training for Hazardous Waste Operations, OSHA, 40-Hour
Green Bay, Wisconsin, 2015

UW-La Crosse
Advanced Wetland Delineation Training, 2017
Basic Wetland Delineation, 2017

University of Minnesota
Erosion and Stormwater Management, Construction Installer, 2017

Erosion and Stormwater Management, Construction Site Management, 2017

Excavation and Trenching Safety
Green Bay, Wisconsin, 2016

FEMA - ICS-100, IS-0100.b, Introduction to Incident Command System Green Bay, Wisconsin, 2016

**US EPA Brownfields Assessment Grant, Neenah, WI**
Evan provided field services and subcontractor oversight for two U.S. EPA Brownfield Site Assessment Grants for petroleum and hazardous substances awarded in 2012 to the City of Neenah, Wisconsin. Duties included preparation of Eligibility Determinations, Phase I and II ESAs, Site Specific, Sampling and Analysis Plans, Health and Safety Plans, street corridor surveys, field sampling report preparation, client and regulatory agency interface, selection of remedial options, and supervision of remediation techniques.

**US EPA Brownfields Assessment Grant, Green Bay, WI**
Evan provided field services and subcontractor oversight for two U.S. EPA Brownfield Site Assessment Grants for petroleum and hazardous substances awarded in 2013 to The City of Green Bay,, Wisconsin. Duties included preparation of Eligibility Determinations, Phase I ESAs, Site Specific Sampling and Analysis Plans, street corridor surveys, Health and Safety Plans, field sampling report preparation, client and regulatory agency interface, selection of remedial options, and supervision of remediation techniques.

**Brad Foote Gear Works Petroleum Remediation Oversight**
Evan contributed to remediation of a historic release of heavy petroleum at a closed gear works in the suburbs of Chicago, Illinois. Remediation efforts included planning and oversight of remedial excavation as well as confirmation sampling. Site work was completed on budget despite logistic challenges of removing materials from within site buildings with limited space.

**Neenah Site 7 Development Project, Neenah, WI**
Evan oversaw the removal of metal, PAH, and VOC contaminated soil on a site within the City of Neenah in line with construction of a multi-story office building. Evan directed sub-contractors to delineate excavation and provide soil sampling services.

**Wausau Riverfront Redevelopment, Excavation Oversight, Wausau, WI**
Evan oversaw the removal of metal and TCE contaminated soil on a large brownfield site within the City of Wausau adjacent to the Wisconsin River. Evan directed sub-contractors to keep the project on task and provide soil and groundwater sampling services. Evan's activities have contributed to successful community development and revitalization which has brought downtown Wausau back to life.

**Tannery Falls Apartments, Sheboygan Falls, WI**
Working in partnership with Sheboygan County, Stantec prepared three applications for the FY 2014/2017/FY2019 federal US EPA grant competition–all of which were successfully funded resulting in $1 million for projects implemented by Stantec. Grant funded activities performed by Stantec included several Phase I and II ESAs and NR716 site investigations, remedial planning for three market rate apartment redevelopments, and asbestos assessments for historic building renovations.

**Railyard Innovation District, Green Bay, WI**
Since 2014 Stantec has provided environmental services associated with the on-going redevelopment efforts with the Rail Yard Innovation District (Rail Yard) in Green Bay. The approximate 20-acre property was formerly part of a large canning facility referred to as the Larsen Canning Company. The Larsen Canning Company operated at the property as a vegetable cannery until its closure in 2003. In support of cannery operations, the Property historically contained multiple large warehouses, support buildings, numerous railroad tracks/spurs, and a roundhouse.

**The Shipyard, Green Bay, WI**
Stantec is working with the City to design a rich assortment of attractions and programming that will provide visitors and residents with a year-round destination to gather. Our design team completed an extensive survey of the project area, performed a structural analysis of the subsurface soils, and prepared site planning and mass grading plans and public improvement plans. We facilitated program discussions for The Shipyard park improvements and are working with the City on design development of The Shipyard amenities and associated support infrastructure (regional trail connections, safe railroad crossing, parking lots, road reconstruction). Throughout the project we have maintained careful focus on options that the City residents desire, local businesses can champion, and the City can realistically operate and maintain.

**Back 40 Wetland Mitigation Banking, Menominee, MI**
Evan worked with a team of Stantec personnel requested to map approximately 400 acres as part of the installation of a new gold mining operation. Tasks included delineating wetlands as well as mapping streams, open waterbodies, vegetative communities and potential infrastructure.

**Wisconsin Main Replacement, Plymouth to Chilton, WI**
Evan worked with a Stantec team performing a wetland delineation and land-use cover mapping for a proposed natural gas main replacement. Approximately 30 miles of field work were completed over three weeks on budget and on schedule.

**Environmental Site Assessments, Various Locations, Wisconsin**
Evan has performed numerous Phase I Environmental Site Assessments for locations in Wisconsin and Minnesota to identify past or present recognized environmental concerns. Investigations included analyzing data retrieved via historical resources, stakeholder interviews, and site reconnaissance.

**Phase II Environmental Site Assessments, Various Locations, Wisconsin**
Evan has conducted numerous Phase II ESAs at multiple petroleum sites throughout Wisconsin. Project tasks included characterization and delineation of extent of soil and groundwater contamination using geoprobe techniques. Evan's efforts have aided in the successful remediation and case closure of multiple properties in the state of Wisconsin.

**Wetland Restoration, Ishpeming, MI**
Evan helped a team of Stantec personnel restore valuable wetland habitat in the Upper Peninsula of Michigan. Restoration took place to restore valuable habitat after the construction of a natural gas pipeline. Restoration included reintroducing native wetland plant species to areas damaged or destroyed by pipeline installation activities.

# HARRIS BYERS

Dr. Byers has more than 20 years of professional consulting experience designing and managing investigation, remediation, and redevelopment projects at a wide variety of Brownfield properties. He has extensive experience in envisioning, preparing, and administering US EPA, State, Federal, and local Brownfield assessment, cleanup, planning, and research grants. He has prepared applications for and/or managed over $11,000,000 in Brownfield grant funded projects for a wide range of clients, including local units of government, research institutions, private developers, and local community-based non-profit organizations. As a direct result of strategic implementation of these grants, grantees have successfully leveraged over $250,000,000 in additional private redevelopment funds, local Brownfield redevelopment funds, state Brownfield redevelopment funds, and additional EPA Brownfield grant funds.

## Associate, Hydrogeologist

**EDUCATION**

PhD, University of Wisconsin-Milwaukee, Geosciences, Milwaukee, WI, 2019

MS, University of Georgia, Agronomy, Athens, Georgia, 2004

BS, University of Georgia, Science Education, Athens, Georgia, 2000

**REGISTRATIONS**

State of Wisconsin
Certified Pesticide Applicator

**CERTIFICATIONS**

OSHA Hazardous 40 h Waste Site Worker Trained
National, US, 2014

NIH CITI Training &
NIH PHRP Training
National, US, 2014

Confined Space Entry
National, US, 2014

**US EPA Brownfields Community-Wide Assessment Grant Implementation, Manitowoc, WI, Senior Brownfields Project Manager**

Harris is serving as the Sr. Brownfields Project Manager/lead grant writer during implementation of USEPA CWA Brownfield Grants for petroleum and hazardous substances awarded to the City in FY15. Activities include completing property eligibility determinations, negotiating Site access agreements and designing and conducting Phase I ESA evaluations per ASTM E1527-13.

Work includes preparing SOPs, completing a QAPP and annual updates, developing SAPs, designing and conducting Phase II ESAs in accordance with ASTM E1903-97(2002); development and submittal of Site Investigation Work Plans for state regulatory agency review; preparation of Site Investigation and Remediation Work Plans in accordance with state statutes; and preparation of Closure Requests.

**US EPA Brownfields Cleanup Grant Implementation, Wausau, WI, Senior Project Hydrogeologist**

Harris is currently serving as the Sr. Project Hydrogeologist during implementation of two cleanup grants in the City of Wausau, Wisconsin. Tasks have included preparation of multiple ch. NR 716 Site Investigation Reports, ch. NR 722 Remedial Action Options Reports, and ch. NR 724 Remedial Action Plans.

**Brownfield Grant Writing, Various Locations, Wisconsin and Indiana**

Authored and coauthored more than a 15 successful State, Federal, and local brownfield assessment, cleanup, planning, and/or research grants for municipal and non-profit clients. Harris has worked with units of local government, research universities, research hospitals, and local community-based non-profit groups in pursuing these grants. Harris has had significant success in strategizing and preparing successful grant applications for first-time applicants as well as providing long-term strategic grant planning for established grantees. As a direct result of strategic implementation of these grants, grantees have successfully leveraging over $25,000,000 in private redevelopment funds, local Brownfield redevelopment funds, state Brownfield redevelopment funds, and additional USEPA Brownfield grant funds.

**US EPA Brownfields RLF Cleanup Grant Implementation, Racine, WI**
**RL F Grant Specialist, 2015**

Harris is currently serving as the RLF grant specialist during implementation of an RLF by the City of Racine, Wisconsin. Future ongoing tasks include preparation of ABCA, Site Visits to confirm project compliance with approved loan, ACRES updates, and reviewing/approving invoices. Mr. Byers retains responsibility for documenting and reporting compliance with the Davis Bacon Act and SBE/MBE/WBE fair share objectives.

**US EPA Brownfields CWA Grant Implementation *, Wauwatosa, Wisconsin, Senior Brownfields Project Manager**
Harris served as the Brownfields Project Manager and lead grant writer during implementation of four USEPA Community-Wide Brownfield Site Assessment Grants for petroleum and hazardous substances awarded to the City Wauwatosa, Wisconsin. Activities included designing and conducting Phase I ESA evaluations per ASTM E1527-05; designing and conducting Phase II ESAs in accordance with ASTM E1903-97(2002); development and submittal of Site Investigation Work Plans for state regulatory agency review; preparation of Site Investigation and Remediation Work Plans in accordance with state statutes; and preparation of Closure Requests. In addition, tasks included data acquisition and designing and maintaining a custom GIS Brownfield database containing a large variety of static and dynamic datasets, including state and federal database records; historic Sanborn Fire Insurance and plat maps; historic orthophotographs; and property-specific use documentation. Development of the custom GIS database included. Additional activities included regulatory liaison, negotiation with regulatory agencies, public outreach. Unique data analysis included parametric and nonparametric statistical modeling/analysis of environmental data & development of USEPA-Approved QAPPs and SOPs. Harris assisted the City in completing all federal grant reporting requirements to maintain compliance with USEPA Cooperative Agreements and requirements of the American Recovery and Reinvestment Act of 2009.

**US EPA Brownfields RLF Cleanup Grant Implementation, Manitowoc, WI, Brownfields Project Manager**
Harris is currently serving as the RLF project manager during implementation of an RLF by the City of Manitowoc, Wisconsin. Ongoing tasks include preparation of eligibility determinations, site access agreements, technical/peer reviews of site investigation and remedial action plans, preparation of ABCAs, facilitate Section 106 reviews, complete decision memorandums, conducting Site Visits to confirm project compliance with approved loan, ACRES updates, and reviewing/approving invoices. Work has included development of CIP and Administrative Records. Mr. Byers will document compliance with the Davis Bacon Act and SBE/MBE/WBE fair share objectives. Additional tasks include preparation of quarterly reports, ACRES updates, and regulatory agency correspondences.

**US EPA Brownfields Community-Wide Assessment Grant Implementation, Multiple Communities, Senior Brownfields Project Manager**
Dr. Byers is serving as the Sr. Brownfields Project Manager/lead grant writer during implementation of numerous USEPA CWA Brownfield Grants for petroleum and hazardous substances awarded to multiple communities in the Midwest. Ongoing activities include completing property eligibility determinations, negotiating Site access agreements and designing and conducting Phase I ESA evaluations per ASTM E1527-13. Work includes preparing SOPs, completing a QAPP and annual updates, developing SAPs, designing and conducting Phase II ESAs in accordance with ASTM E1903-97(2002); development and submittal of Site Investigation Work Plans for state regulatory agency review; preparation of Site Investigation and Remediation Work Plans in accordance with state statutes; and preparation of Closure Requests. In addition, tasks include data acquisition and designing and maintaining a custom GIS Brownfield database containing a large variety of static and dynamic datasets, including state and federal databases historic Sanborn Fire Insurance and plat maps; historic orthophotographs; and property-specific use documentation. Additional activities included regulatory liaison, negotiation with regulatory agencies, public outreach.

# STU GROSS

Stu's knowledge and experience in environmental consulting and project management spans 29 years. He is a professional geologist licensed in Wisconsin and currently serves as the environmental remediation team lead managing a group of employees that perform environmental services for a wide variety of client types. Stu has successfully managed and/ or personally completed a wide range of projects including: environmental due diligence related to property transactions, Brownfield redevelopment, remedial investigations and planning, industrial facility deactivation/deconstruction, mine reclamation planning, environmental compliance and geologic and hydrogeologic evaluations on a variety of proposed developments and non-metallic mining sites.

## Principal, Business Center Practice Leader

**EDUCATION**
BS, Geology
(emphasis Hydrogeology)
Madison, Wisconsin, 1994

**REGISTRATIONS**
State of Wisconsin
Professional Geologist
#1201-13, 2003

State of Illinois
Professional Geologist
#196001290, 2010

**CERTIFICATIONS**
40-hour Health & Safety Training
for Hazardous Waste Operations
Milwaukee, Wisconsin, 1994

**US EPA Brownfields Assessment Grant Implementation, Sheboygan County, WI, Project Manager**
Providing technical and management oversight for implementation of two U.S. EPA Brownfields Assessment Grants for petroleum and hazardous substances awarded in 2014 to Sheboygan County, Wisconsin. The grants are being utilized to inventory Brownfield properties, perform environmental assessments on select sites, conduct remedial planning and assist with community involvement activities as part of a three-year contract. All data is being managed utilizing geographic information system (GIS) and other data management tools.

**US EPA Community-wide Brownfields Assessment Grant Implementation, Marinette County, WI, Due Diligence Team Lead**
Provided technical oversight for phase I and II ESA activities associated with the implementation of two US EPA Community-wide Brownfields Assessment Grants for petroleum and Hazardous Substances awarded in 2010 and 2011 to Marinette County, Wisconsin. Funding was used to complete a brownfield inventory including a heavy GIS component, Phase I and II ESAs, site investigations, reuse planning alternatives for a failing mall, and development of remedial action plans for multiple properties.

**US EPA Community-wide Brownfields Assessment Grant Implementation, Neenah, WI, Due Diligence Team Lead**
Provided technical oversight for phase I and II ESA activities associated with the implementation of two US EPA Community-wide Brownfields Assessment Grants for petroleum and Hazardous Substances awarded in 2012 to the City of Neenah, Wisconsin. Funding is being used to inventory Brownfield properties, perform environmental assessments on select sites, conduct remedial planning and assist with community involvement activities as part of a three-year contract.

**US EPA Community-wide Brownfields Assessment Grant Implementation, Green Bay, WI, Due Diligence Team Lead**
Provided technical oversight for phase I and II ESA activities associated with the implementation of two US EPA Community-wide Brownfields Assessment Grants for petroleum and Hazardous Substances awarded in 2013 to the City of Green Bay, Wisconsin. Funding is being used to inventory Brownfield properties, perform environmental assessments on select sites, conduct remedial planning and assist with community involvement activities as part of a three-year contract.

**Whitestone Village Brownfield Redevelopment, Menomonee Falls, WI, Project Manager**
Provided technical and project management assistance for $180M multi-year brownfield redevelopment project. Project includes contracted services for two developers and the Village including assessment and remediation of multiple contiguous former industrial properties totaling over 100 acres for redevelopment to mixed residential and retail use. Project was complicated by the presence of hazardous solvent waste, PCB contamination, wetland contamination, and compressed schedules required for site construction. Also included civil design and construction over site including street, storm water and sewer/water improvements which were coordinated with remedial activities. The site is one of the largest redevelopment sites in suburban Milwaukee, both in terms of its land area and the value of the expected development (>$100 million) which will include a Costco store, 3 mid-box retail stores, a hotel, and approximately 340 market rate apartments.

**Domtar Paper Company, LLC, Rothschild, WI, Project Manager**
Stu is managing various environmental aspects related to the recently completed construction of a new biomass cogeneration facility on portions of Domtar's property in Rothschild, Wisconsin. The project involves the construction of several buildings, structures, storage areas, and a storm-water treatment area. To achieve this goal, approximately 60,000 cubic yards of soil required off-site disposal since historic fill containing cinders and various building materials present in these areas is unsuitable to support future structures. Much of the fill material was also contaminated with various metals, volatile organic compounds, and polycyclic aromatic hydrocarbons. Stantec managed and performed many aspects of the project including completion of an extensive soil sampling to characterize the historic fill, preparation of a project work plan to guide environmental aspects of the project and obtain WDNR concurrence with the proposed activities, preparation of a Regulated Materials Management Plan to guide construction activities and address unexpected wastes or contaminated media potentially encountered, coordinate and obtain approval from local disposal facilities, and day to day field observation and soil screening with a PID to document contaminant concentrations and properly manage encountered materials. Current activities include a site-wide valuation of groundwater quality. The project was initiated in mid-2011 and continues through the present day.

**Lilydale Regional Park Remedial Action Plan, St. Paul, MN, Project Manager**
Provided technical and management oversight for the Lilydale RAP project, which involved development of a Response Action Plan (RAP) for two dump sites within the 384-acre Lilydale Regional Park. This project was one of the first steps in St. Paul's planned $13.7 million park improvement project. The RAP was used to guide remedial activities while protecting public health and the environment. Additional services provided include wetland delineation, floodplain modeling, and a sanitary sewer study. The project stemmed from a Natural Resources Management Plan also completed by Stantec.

**Sacred Heart Redevelopment, St. Francis, WI, Project Manager**
Provided technical and management oversight which included a due diligence and building decommissioning services at Sacred Heart Jesus Property in St. Francis, WI. These services were instrumental in the redevelopment of the property into a senior living facility and community center.

**Underground Storage Tank Evaluation, Multiple Locations, Project Manager**
Responsible for remedial investigation, evaluation of remedial alternatives, state agency liaison and remedial action plan preparation and implementation related to numerous underground storage tank (UST) system releases of petroleum and chlorinated solvent compounds in Wisconsin, Illinois, Iowa and Indiana. Many of the projects were completed utilizing State reimbursement programs.

**Cascade Lake Park Redevelopment, Rochester, MN, Project Manager**
Stu authored the mining reclamation plan, which provided guidance for minimizing all environmental issues related to the former site operations. Stantec developed a visionary master plan for this 200-acre city oasis that once housed mining operations. The Master Plan includes recreational features for boating and swimming, an interpretive trail system highlighting natural resources and the site's cultural history, picnicking, fishing, gathering, and concert facilities.

# Resume Bios

Why choose us? Get to know our team to find out why.

***Hiedi Waller,*** *PE*
**Grant Research**

Hiedi's experience in engineering and project management spans more than 30 years. As a senior registered engineer, Hiedi provides support on contaminant investigation and remediation projects for both soil and groundwater contamination. Hiedi has put her property assessment and contaminant management skills to use on numerous brownfield redevelopment and brownfield program coordination projects.

***Jeff Brand***
**Field Support**

Jeff has completed numerous Phase I and II ESAs, Health and Safety Plans, Site Investigations, Soil and Groundwater Sampling Reports, and Case Closure Reports at brownfield, industrial, commercial, and landfill sites with hazardous substance contamination. His US EPA Brownfield experience includes work in Neenah, Green Bay, Marinette County, and Stevens Point, Wisconsin.

***Tyler Hischker,*** *PG*
**Phase I ESA**

As part of the Stantec team, Tyler has regularly been designated as the field lead for Phase I and II Environmental Assessments performed as part of various US Environmental Protection Agency (US EPA) Brownfield Grants and assists in the creation and implementation of NR716 Site Investigation work plans.

***Chris Hatfield,*** *PG*
**Phase I ESA**

Chris is a professional geologist with more than 25 years of experience in environmental consulting and project management. His project experience includes property assessment, improvement, development for commercial, municipal, industrial, and utility-scale renewable energy redevelopment projects. His project management responsibilities include technical direction, data analysis, report writing, budget development and tracking, scheduling, and coordination of fieldwork.

***Sarah McDonald,***
***CLARB, PLA***
**Community Outreach**

Sarah has a passion for designing spaces that improves the relationship between people's quality of life and the built environment. Sarah's professional experience spans the realm of urban design, landscape design, brownfield redevelopment, and green infrastructure for a wide range of project markets. Sarah thrives on finding meaningful and unique ways of engaging with key community stakeholders for all the projects she works on.

***Tom Leighton,***
*AICP, EDFP*
**Planner**

As a certified planner, Tom brings decades of market experience to communities working to find the highest and best use of a brownfield in the 21st Century. Tom is working on several reuse plans throughout the east-central portion of Wisconsin and is well versed in the challenges facing the region.

***Paul Eickenberg,***
*MSCE, MSLE, PE*
**Marine Structural Engineer**

Paul is a professional civil engineer and former University of Minnesota civil engineering Instructor with 24 years of experience in the geotechnical, structural, and civil/ municipal industries. His career focus has involved slope stabilization, geotechnical testing and monitoring, dam inspections and repair, retaining and flood wall design and installation, general structural engineering, municipal roadway and utility design, and stream/coastline restoration through soft-armoring and submerged breakwater concepts.

***Sydney Herman***
**Phase I ESA**

Sydney has experience in Phase I Environmental Site Assessments (ESAs) which involve analyzing historical records, stakeholder interviews, conducting site reconnaissance, and compiling of a final written report. She also contributes to Phase II ESAs and Site Investigations through soil and groundwater sample collection and surveying.

***Yong Wu,*** *PE*
**Geotechnical Engineer**

Yong's more than 19 years of professional experience includes the design and analysis of projects involving concrete dams, earth dams and embankments, tunnels, deep shafts, flood walls, pump stations, landfills, retaining structures, and deep and shallow foundations. He has extensive experience in planning and conducting subsurface investigations and laboratory testing, characterizing soil and rock engineering properties, and performing various engineering analyses.

***Aaron Volkening,***
*PE*
**Stormwater Engineer**

Aaron applies a mix of experience, theory, and technology to water resources planning and design. Aaron's design experience includes detention ponds, channels and streams, bridge and culvert crossings, storm sewers, and other infrastructure. He has worked extensively with regulatory compliance requirements in the areas of stormwater quantity and quality, navigable waterways, and floodplain management.

# 4. Project Budget

We understand that the City of De Pere has designated $400,000 to implement a Brownfield Program. As part of this Project, Stantec personnel would work closely with the City to maximize the City's existing funding and leverage additional grant funds to address brownfield sites. As mentioned previously, the proposed scope of work includes the following tasks; Task 1: Program Development, Task 2: Evaluation of (8) Catalyst Brownfield Sites, Task 3: Assessment, Remediation Planning, Onsite Remediation Work, and Task 4: Future Grant Application Support. We understand the project will be led by the City and supported by Stantec. The following sections lay out brownfield services Stantec anticipates providing as part of this project implementation as well as the estimated budgets for each task.

## Proposed Scope of Work

### Task 1: Program Development

As part of this task, Stantec will work closely with the City to develop a Brownfield Program to assess, cleanup, and redevelop brownfield sites within the City. The Brownfield Program will take into consideration how existing funds should be utilized, identify priority sites, identify steps required to build a sustainable program, and how to maximize State and Federal grant funding. This task is anticipated to evolve over time pending the needs of the City and as redevelopment opportunities arise. To begin the process, Stantec will hold regular meetings with City staff and other appropriate parties to cultivate ideas, develop strategies, and develop a sustainable program.

### Task 2: Evaluation of (8) Catalyst Brownfield Sites

In general, work under Task 2 would consist of a review of existing project work, discussions with potential developers, establishing a timeline of probable next steps, identifying potential funding opportunities that align with project schedule, and creating an outline of proposed future work. The work will range from Phase I environmental site assessments (ESAs) to Remedial Action Options reports that evaluate the types/extents of potential remediation needed to redevelop sites for industrial, commercial, and/or multi-family residential purposes. This task may also include preparing project Cut Sheets or other deliverables associated with the catalyst sites to assist the City in marketing the Properties.

The eight catalyst sites are summarized below along with anticipated project work anticipated.

**1) City Parking Lot site, 360 Main Ave:** We understand Robert E. Lee and Associates have been working on this project. Remedial action planning will be needed as part of future redevelopment of the Site and ultimately to obtain case closure. Ideally, the City envisions this property to be redeveloped for mixed-use with affordable housing. Stantec can complete remedial action planning and remedial oversight activities as requested. Also, if applicable, Stantec would evaluate options to manage impacted soil at another site if needed. We would also focus on identifying additional grant funds to leverage remediation costs.

For the purpose of this proposal, Stantec included costs to review existing data, coordinate with the City and future developer about planned site reuse, and prepare a remedial action plan to manage impacted soil excavated during the redevelopment activities.

**2) City of De Pere parking lot, South Broadway:** We understand Cedar Corp is currently working on this site and is completing groundwater monitoring. Ideally, the site will be redeveloped in the future as townhomes, commercial, and other mixed-use spaces. Stantec could assist in developing a remedial action plan that aligns with the future use of the site and look into grant funding that could leverage cleanup associated with the future development plans as needed.

For the purpose of this proposal, Stantec included costs to review existing data, coordinate with the City and future developer about planned site reuse, and prepare a remedial action plan to manage impacted soil excavated during the redevelopment activities.

**3) Joe's Service, 400 Main Avenue:** The site is a former gas/service station and a Phase II ESA was recently conducted which identified contamination. The site, along with adjoining parcels, were identified in the City's West Downtown Vision Plan as being a prime redevelopment site. Preliminary data indicates high levels of petroleum in soil and groundwater. Further investigation and cleanup planning will be needed. Ideally, additional assessment would also be completed at the adjacent properties so redevelopment plan including all parcels could be configured.

For the purpose of this proposal, Stantec included costs to review of existing data and complete Phase I ESA(s) of the adjacent properties in accordance with the requirements of ASTM E1527-21, Standard Practice for Environmental Site Assessments: Phase I Environmental Site Assessment Process. This Phase I ESA and future Phase I ESAs completed as part of this project will be conducted per the details provided in Attachment A.

**4-7) Redevelopment Sites along Southern Bridge Route:** Brown County is leading the construction of what is known as the southern bridge, slated to be constructed between 2025 to 2030. Several sites in the business park could provide exceptional redevelopment opportunities along the new route and the City is already being approached by potential developers. Four sites identified in this area are listed below. Stantec would review the status of each Property to develop "Cut Sheets" which will describe the project, known environmental impacts and options or impacts associated with development. This proposal includes costs to complete Cut Sheets for each of the sites listed on the next page:

a. Okeefe Property #2 (WDNR EM/RR BOTW (wi.gov)
b. Reliance Property (WDNR EM/RR BOTW (wi.gov)
c. Southbridge Business Park or GDC American Blvd (grass area west of GDC American Blvd.) WDNR BRRTS File
d. City Soil Piles, Parcel WD-1138 – (WDNR EM/RR BOTW (wi.gov)

**8) G&G Rebuilders Inc, 2535 Lawrence Drive:** This site is a tax delinquent parcel but continues to operate as an automotive repair facility. The City is interested in acquiring the parcel for future development and to return the site to the tax base. Stantec would work with the City to obtain access. Once access is obtained a Phase II ESA would be completed. This proposal includes the initial costs to work with the City, County, and WDNR to obtain access of the site. The scope of work and estimated costs to complete the Phase II ESA will be developed upon obtaining access or off-site access near the property.

**Task 3. Assessment, Remediation Planning, Onsite Remediation Work**
The majority of the project budget is allocated to Task 3 as uncommitted funds to support continued assessment, remediation planning, or onsite remediation work as identified at the target properties during Task 2 or at other brownfield sites identified in the future.

**Task 4. Future Grant Application Support**
Budget under this task would be allocated as uncommitted funds to support efforts for state or federal brownfield grant writing activities (e.g., Wisconsin Economic Development Corporation (WEDC) site assessment grant (SAG), WDNR Wisconsin Assessment Money (WAM), WEDC Brownfield Cleanup grants, United States Environmental Protection (US EPA) Technical Assistance to Brownfields (TAB) TAB, and/or US EPA assessment or cleanup grant funds.

## PROBABLE COST AND SCHEDULE

Work can begin on this project immediately upon written authorization to proceed. Project work will be coordinated with Stantec, the City of De Pere, and the selected subcontractors.

Due to the variable nature of this type of work, the project will be performed on a time-and-materials basis, according to the Rate Table provided below. Given the scope of work may evolve, Stantec has provided ranges to complete the identified tasks. As additional work is identified, costs to complete the work will be provided to the City for review. Once approved, uncommitted funds will be assigned to project tasks. We understand the total project budget including uncommitted funds at this time is $400,000. Written authorization via email would be obtained by the City prior to initiating subsequent work under Tasks 3 and 4.

The probable costs provided below includes labor, supplies, rebillables, and commodity services necessary to complete the described work plan activities. Stantec will not exceed the authorized amount without prior written approval. Additionally, budgets are estimates, and we reserve the right to reallocate budget between the subtasks and services listed for actual work performed. The amount of work necessary to complete the project will depend upon site conditions and the level of service requested. Probable costs, based on similar projects, are itemized on the next page.

## Consulting Services

| | |
|---|---|
| **Task 1: Program Development** | $5,000 - $10,000 |
| **Task 2: Evaluation of (9) Catalyst Brownfield Sites** | |
| 1) City Parking Lot site, 360 Main Ave | |
| a. Review of data, discussion with City/Developer, and prepare RAP | $6,500-10,000 |
| 2) City of De Pere Parking Lot, South Broadway | |
| a. Review of data, discussion with City/Developer, and prepare RAP | $6,500-10,000 |
| 3) Joe's Service, 400 Main Avenue | |
| a. Review data and complete Phase I ESA(s) on Adjacent parcels (1 to 3 parcels) | $5,500 - $15,000 |
| 4) Redevelopment Sites along Southern Bridge Route (4 sites) | |
| a. Review site data and develop cut sheets | $8,500 - $15,000 |
| 5) G&G Rebuilders Inc, 2535 Lawrence Drive | |
| a. Obtain site access and develop workplan for Phase II ESA | $1,000 |
| 6) Parcel ED-789, 126 South Broadway Street | |
| a. Complete Phase I ESA | $6,000 |
| **Task 3. Assessment, Remediation Planning, Onsite Remediation Work** | |
| Uncommitted Costs for Future Work | $313,000 - $346,000 |
| **Task 4. Future Grant Application Support** | |
| Uncommitted Costs for Future Grant Application | $15,000 - $20,000 |
| **PROBABLE COST** | **$400,000** |

Rate Table to be used for Tasks 1-4

| Stantec Billing Level | 2024 Hourly Rate* |
|---|---|
| 3 | $109 |
| 4 | $123 |
| 5 | $133 |
| 6 | $138 |
| 7 | $146 |
| 8 | $152 |
| 9 | $163 |
| 10 | $169 |
| 11 | $181 |
| 12 | $187 |
| 13 | $196 |
| 14 | $205 |
| 15 | $231 |
| 16 | $263 |
| 17 | $272 |
| 18 | $278 |
| 19 | $287 |
| 20 | $299 |
| 21 | $311 |

*Rates subject to annual increase.

**OTHER EXPENSES / MATERIALS**

Stantec's standard mark-up on expenses is 10%. Unless prescribed differently within the proposal or other contract paperwork, this mark-up is used in all areas as indicated below:

Sub-Consultants
Subcontracted Commodity Services
e.g., analytical laboratory services, drilling contractors, etc.

Meals and Lodging
May be billed at cost or daily per diem. If applicable, per diem rates will be those set by the U.S. General Services Administration (https://www.gsa.gov).

Vehicle and Equipment Rentals
Not owned by Stantec.

External Equipment and Supplies.
e.g., delivery charges, outside copying/reproduction, leased/ rented field equipment, etc.

Company-owned equipment will be billed on unit rate basis (e.g., daily; weekly); the expense markup does not apply to these rates. For Stantec owned vehicle, a combination of daily vehicle or milage rates are used depending on the type of work and/ or contract. A separate Stantec Equipment Rate Schedule* is available upon request.

# 5. Local Experience and Knowledge

## Stantec has significant experience performing brownfield assessments and cleanups in Wisconsin.

We are unmatched experts in securing and implementing brownfield assessment and cleanup programs including those funded through the United States Environmental Protection Agency, the Wisconsin Economic Development Corporation, and the Wisconsin Department of Natural Resources brownfield programs.

Our local/regional expertise includes close collaboration with US EPA, WDNR, local stakeholders, other consultants/environmental professionals, private developers, and the community while strategically completing work products under federal, state, and local funded assessment and cleanup grants.

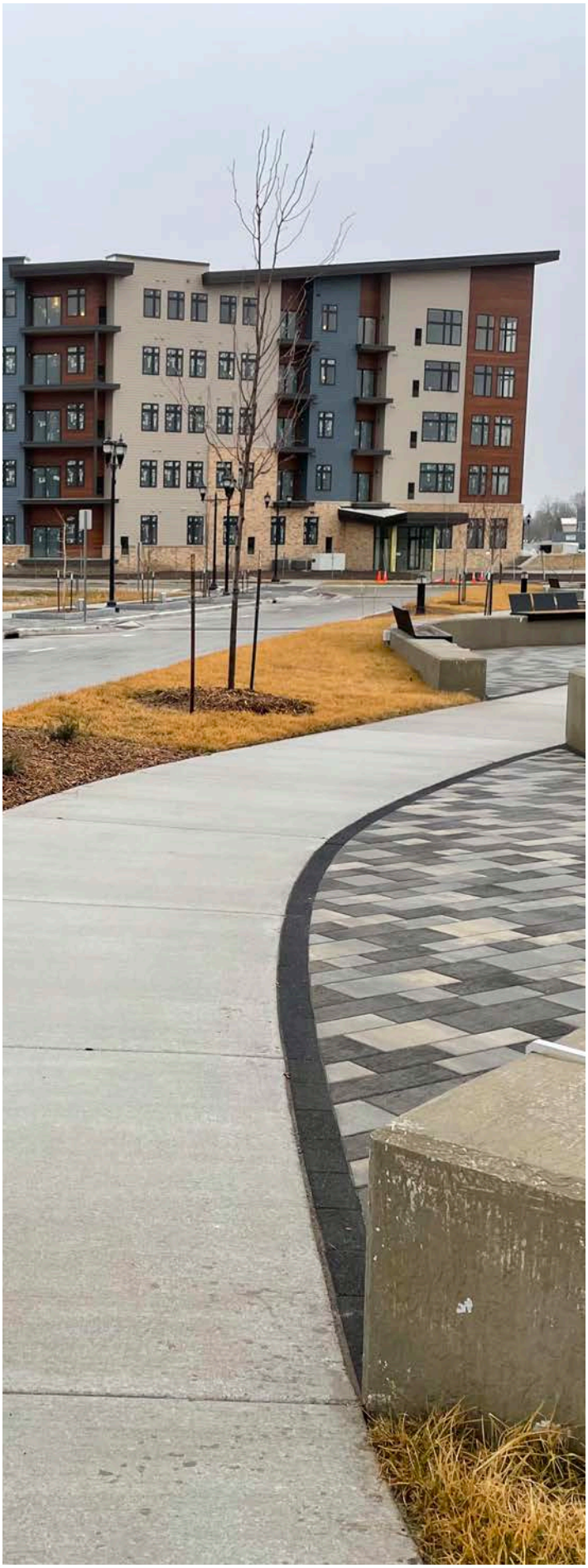
### Local Knowledge of De Pere

Stantec has been in Wisconsin for 35 years and part of the De Pere community since 2011. Our De Pere office is the home of 45 staff and our North Central Wisconsin brownfield redevelopment team who are familiar with the challenges the City faces and ongoing planning efforts. Our Project team has continued to grow by establishing long-term relationships with clients based on trust, integrity, and a commitment to making a difference in the communities we serve. Our skilled professionals work together to deliver creative design solutions for our clients' toughest challenges.

Many of our local staff are residences of De Pere or alumni of St. Norbert College. We are proud to be part of the brownfield redevelopment efforts of the Cobblestone Hotel in the City's downtown and are excited to be part of the City's future brownfield redevelopment efforts. Our Team understands the City's goals and realizes you have made significant strides over the past several decades but your work is not yet finished. Lynelle Caine worked closely with Dan Lindstrom on the University Avenue Brownfield Area-wide Plan for the City of Green Bay and we are familiar with his expectations and respect his attention to detail.

We have been working with neighboring communities including Green Bay and Ashwaubenon for over a decade, including brownfield redevelopment efforts at the Shipyard and Aldon Station. We are also currently implementing Bay-Lakes Regional Planning Commissions US EPA Brownfield Assessment grant.

Supporting Ms. Caine our local project team are staff with the experience and competence to meet your contract's specific requirements. As needed, we will engage other local Wisconsin-based staff with state and local knowledge to match your goals with the correct technical experts. Our Wisconsin roots combined with our global expertise, we look at every challenge as an opportunity to bring communities together and make lasting connections with the people and places we serve.



# 6. References

## Key Accounts and Recent Project Examples

To further demonstrate Stantec's experience, we've included recent brownfield project examples on the following pages that were implemented by one or more members of our proposed team. All project examples were completed within the last three years and US EPA or State brownfield funds were utilized.

A list of current key accounts for assessment or cleanup projects completed in Wisconsin that Stantec is currently managing or has recently completed with their contact information is also provided.

### City of Green Bay and Green Bay RDA
Matthew Buchanan, AICP
100 North Jefferson Street
Green Bay, WI 54301
920-448-3396
matthew.buchanan@greenbaywi.gov

### Village of Ashwaubenon
Aaron Schuette
2155 Holmgren Way,
Ashwaubenon, WI 54304
920-593-4405
aschuette@ashwaubenon.gov

### City of Neenah
Chris Haese
211 Walnut St. Neenah,
P.O. Box 426, WI 54956
920-886-6127

### City of Manitowoc
Adam Tegen
900 Quay Street
Manitowoc, WI 54220
920-686-6931
ategen@manitowoc.org

### Bay-Lake Regional Planning Commission
Sydney Swan
1861 Nimitz Drive
De Pere, WI 54115
920-448-2820
sswan@baylakerpc.org

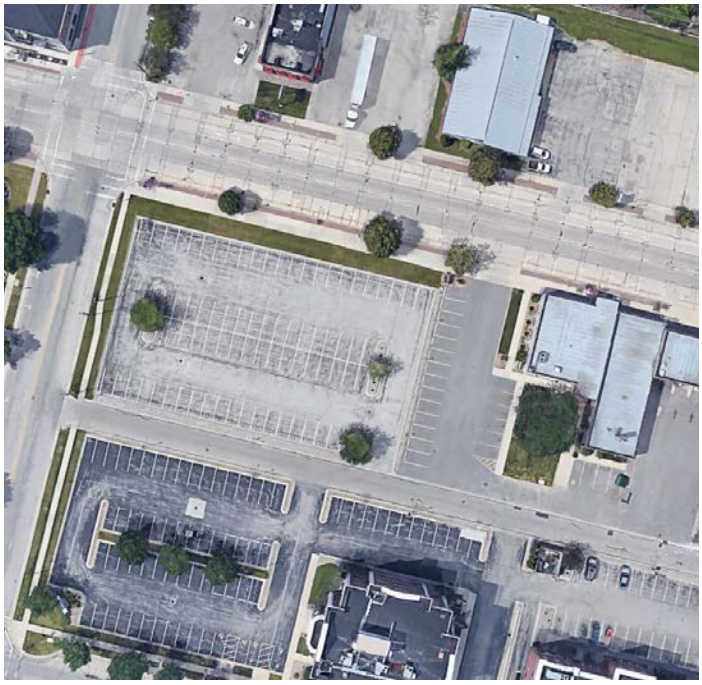
### Washington County
Debora Sielski
Public Agency Center
Suite 2300
333 E. Washington Street
West Bend, WI 53095-2003
262-335-4772

### Sheboygan County
Aaron Brault
508 New York Avenue
Sheboygan, WI 53081
920-459-3060

### Calumet County
Jason Pausma
206 Court Street
Chilton, WI 53014
(920) 849-1684
jason.pausma@calumetcounty.org

## Experience Table of Wisconsin Brownfield Projects Completed within the Past Three Years

| Service | City of Green Bay US EPA Cleanup, Assessment, and Planning Grant Procurement and Implementation | Village of Ashwaubenon, Assessment and Cleanup of Multiple Sites | Neenah and PH Glatfelter Paper Mill Grant Procurement and Implementation | City of Manitowoc Comprehensive Brownfield Services | Bay Lake Regional Planning Commission US EPA Assessment Grant Implementation | Washington County Site Redevelopment Program Assistance | City of Brillion Assessment and EPA Cleanup Grant Implementation | Sheboygan County Brownfields Program | Calumet County Assessment Grant Procurement and Implementation |
|---|---|---|---|---|---|---|---|---|---|
| Phase I ESAs | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Quality Assurance Project Plans (QAPP) | ● | | ● | ● | ● | ● | ● | ● | ● |
| Phase II ESAs and NR 716 Site Investigations | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Pre-Demolition Facility Assessments | ● | | ● | ● | ● | ● | | ● | ● |
| Asbestos and Lead-Based Paint Abatement | ● | | ● | ● | ● | | ● | ● | ● |
| Remediation Activities | ● | ● | ● | ● | ● | ● | ● | ● | |
| Geotechnical Services | ● | | | ● | | | | | |
| Stormwater Management | ● | | ● | ● | | ● | ● | ● | |
| Community Involvement | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| US EPA/WDNR Grant Management Assistance | ● | | ● | ● | ● | ● | ● | ● | ● |
| **ADDITIONAL SERVICES** | | | | | | | | | |
| Demolition | ● | | ● | ● | | | ● | ● | |
| Site Civil Design | ● | ● | ● | ● | | | | | |
| Architectural Design | ● | | | ● | | | ● | | |
| Sustainability | ● | ● | ● | ● | | | | ● | ● |
| NEPA Review (Section 106) | ● | | | ● | | | | | |
| Vapor Recovery/Subslab Depressurization | ● | | ● | ● | | | ● | ● | ● |
| Site Capping | ● | ● | ● | ● | | ● | ● | ● | ● |
| Adaptive Reuse | ● | ● | ● | ● | | ● | ● | ● | ● |
| Excavation | ● | ● | ● | ● | | ● | ● | ● | ● |
| Floodplain/Floodway Remediation | ● | ● | | ● | | | | | |



# Cobblestone Hotel and Suites

**LOCATION:** De Pere, WI

Recently, Stantec worked closely with De Pere Hotel Group LLC and BriMark Builders, Inc. to facilitate the redevelopment of a vacant De Pere parking lot into a four-story, 60-room Cobblestone Hotel and Suites. The Site formerly operated as a Marathon Gas Station through the early 2000s and was associated with a Wisconsin Department of Natural Resources (WDNR) Bureau of Remediation and Redevelopment Tracking System (BRRTS) leaking underground storage tank (LUST) case. Remaining petroleum contamination associated with the former Marathon Gas Station site required the installation and maintenance of an impermeable cap over the entire Property.

In order to position the Property for redevelopment, Stantec, on behalf of BriMark Builders, LLC prepared a Post Closure Modification Request to the WDNR in addition to a workplan for the installation of a sub-slab depressurization system (SSDS) due to the proposed building's proximity to remaining petroleum impacted soil and groundwater. The system, designed by Stantec, was to perform passively with the option for active ventilation if needed.

Stantec later aided redevelopment of the site by documenting remedial actions associated with the excavation and disposal of approximately 1,500 tons of petroleum impacted soils from the Site prior to development. Following remedial actions, Stantec oversaw the installation of the vapor mitigation system during building construction along with the replacement of site caps required by the WDNR at the time of site closure. In addition, Stantec also conducted post construction ambient air and sub-slab vapor sampling from within the hotel to determine the effectiveness of the SSDS system in the passive configuration. With the help of Stantec, the most highly impacted soil was removed from the property along with the elimination of vapor intrusion concerns within the hotel through the design and implementation of a passive sub-slab vapor mitigation system. In all, the client was able to complete construction of the hotel within an underutilized area of De Pere and bring additional tax dollars to the City while further developing De Pere's vibrant downtown district.

# The Shipyard WEDC and US EPA Brownfield Cleanup Implementation and Redevelopment

**LOCATION:** Green Bay, WI

Stantec is working closely with the City on what is now known as the Shipyard development, a former industrial property along the Fox River in the City's downtown that has remained vacant for decades due to known contamination and geotechnical constraints due to poor subsurface soil quality. The City had a vision to make the Shipyard a regional year round destination, bringing visitors and residents to the City's center and giving them access to the Fox River. As part of these efforts, Stantec has completed Phase I and II ESA's for 26 separate parcels to facilitate redevelopment and acquisition of the Shipyard and parcels in the surrounding corridor as part of the City's US EPA Assessment Grant. We participated in numerous meetings with City officials, WDNR, and other State and Federal agencies to discuss funding options, cleanup alternatives, and redevelopment strategies. We led public meetings (organized in partnership with the City) to promote redevelopment of The Shipyard and other surrounding brownfield sites.

All design aspects are being done to minimize soil disruption and incorporation of the cleanup plan and approved ABCA for the Site. Initial capping of a portion of the site has been partially funded through two $500,000 WEDC cleanup grants. Final capping will be achieved through utilization of the City's $500,000 US EPA Cleanup Grant and $154,500 US and Fish and Wildlife Services NRDA Grant for Shoreline Restoration in which Stantec assisted in obtaining and is currently implementing.

# City of Green Bay US EPA Cleanup, Assessment, and Planning Grant Procurement and Implementation

**LOCATION:** Green Bay, WI

Stantec has worked closely with the City of Green Bay for more than a decade and has successfully helped the City and RDA obtain and implement over $5 million in state and federal grant funds to revitalize brownfield sites throughout the City. One of Stantec's first significant projects in the City was the remedial oversight and closure of the former Younkers Department Store, which facilitated the construction of Hagemeister Park.

Recently, Stantec worked closely with City staff and private developers to complete environmental assessment and cleanup in the downtown and surrounding areas to facilitate redevelopment, including the KI Convention Center Expansion, the Metreau, City Deck Landings, Whitney School Lofts, former Larsen Green Cannery, Friar House Flats, and many more. Through these projects, Stantec worked closely with the City staff, design build contractors, architects and the general contractors to assess 94 parcels, totaling 111 acres of land. This work has leveraged over $200 million in private investment and is anticipated to create over 5,000 full-time jobs.

# Calumet County US EPA Assessment Grant Procurement and Implementation

LOCATION: Calumet, WI

Stantec assisted Calumet County in securing and strategically implementing a $300,000 US EPA CWA grant in Fiscal Year 2019. Grant funds were used to complete a county wide brownfields inventory which was used to guide a variety of environmental site assessment outputs at 10 properties, including: eligibility determinations, Phase I ESAs per the requirements of AAI, a QAPP, multiple Phase II ESAs, building structural assessments, groundwater supply well evaluations, pre-demolition surveys, remedial planning activities, and assessment and removal of abandoned fuel oil underground storage tanks. Programmatic support included completing all US EPA required reports, such as quarterly reports, annual financial reports, and MBE/WBE reports.

Outcomes including leveraging $1.4MM in private investment at assessed properties, successful redevelopment of several properties, and using the US EPA grant as the required match to secure a $150K WEDC Site Assessment Grant to support abatement and demolition of a blighted former plating facility building. **Stantec was recently retained to implement an additional $1 million US EPA Communitiy-wide Coalition grant awarded to Calumet County in 2023.**

# Former Larsen Cannery Campus/Rail Yard Innovation District

**LOCATION:** Green Bay, WI

Since 2014 Stantec has provided environmental services associated with the on-going redevelopment efforts with the Rail Yard Innovation District (Rail Yard) in Green Bay. The approximate 20-acre property was formerly part of a large canning facility referred to as the Larsen Canning Company. The Larsen Canning Company operated at the property as a vegetable cannery until its closure in 2003. In support of cannery operations, the Property historically contained multiple large warehouses, support buildings, numerous railroad tracks/spurs, and a roundhouse.

Stantec aided redevelopment through Phase I and II ESAs, asbestos and lead based paint assessments of existing structures, site investigation activities, and remedial action planning. The City of Green Bay's US EPA Assessment grant funds were utilized to fund several of the assessment activities. Two WEDC grants totaling $1 million and an Idle site grant were also obtained to assist in remediation and redevelopment of the Site. Our team also designed a WDNR approved site-wide RAP which allowed the beneficial reuse of low-impact materials on and off site with a limited volume of soil being landfilled. Capping of the entire site with clean soil and/or an impermeable surface is the approved remedial alternative to address contaminant impacts at the Site. This plan has effectively saved hundreds of thousands of dollars through reduced trucking and soil disposal costs.

Redevelopment activities completed to date include construction of townhomes and reuse of existing structures for commercial space and business offices with two separate housing units currently under construction. As redevelopments are completed, new parcels and individual Bureau of Remediation and Redevelopment Tracking Services (BRRTS) cases are being created and broken out from the larger site. To date, WDNR closure of three BRRTS cases within the Rail Yard Innovation District have been obtained. Being located in an opportunity zone, the use of Wisconsin Housing and Economic Development Authority (WHEDA) tax credits and historic preservation tax credits were a few of the many financial tools used to fund the redevelopment efforts at the site.

# City of Manitowoc US EPA Brownfield Grant Procurement and Implementation

**LOCATION:** Manitowoc, WI

Stantec has provided comprehensive brownfield program services to the City of Manitowoc since 2013. Our work began by developing a roadmap to build a sustainable brownfield program in a community with an ever-decreasing population and collapsing commercial/industrial tax base. To date, we have assisted the City in securing/implementing over $5 million in state and federal brownfield grants. The outcomes of strategic grant implementation has leveraged well over $150 million in private and public investment in brownfields in Manitowoc.

In addition to grant writing/implementation, comprehensive services have included developing/managing a US EPA brownfields cleanup RLF (2013-2020 services: program design, policy/procedures manual, community involvement plans, eligibility determinations, negotiating site access, ABCAs, remedial oversight, completing grant reporting requirements per the Cooperative Agreement); US EPA/WEDC brownfield assessment grants (2013-2022 services: documentation of 6 good faith efforts to procure MBE/WBE services, preparing eligibility determinations, site access agreements, Phase I ESAs per AAI, QAPP, Phase II ESAs and NR 716 Site Investigations, Pre-Demolition Facility Assessments, Asbestos and Lead-Bearing Paint, preparing standard operational procedures (SOPs), completing a QAPP and annual updates, developing Sampling and Analysis Plans (SAPs), completion of ABCAs, preparation of closure requests, community outreach, data acquisition and designing and maintaining a custom GIS brownfield database containing a large variety of relevant datasets, completing all federal grant reporting requirements to maintain compliance with US EPA Cooperative Agreements [including quarterly reports, annual financial reports, MBE/WBE reports, audits, and maintaining the US EPA ACRES database]; US EPA/WEDC brownfield cleanup grants (2016-2022 services: ABCA,

Cultural review (Section 106), sub-slab depressurization design/installation, cleanup workplans, remedial design, remediation activities/oversight, asbestos and lead-bearing paint abatement, demolition, site capping, adaptive reuse of historic buildings, excavation, stormwater management, construction documentation reporting). Supporting services have included site civil design, architectural design, and ongoing work involves floodway remediation.

# Sheboygan County US EPA Brownfield Grant Procurement and Implementation

**LOCATION:** Sheboygan County, WI

Working in partnership with Sheboygan County, Stantec prepared three applications for the FY 2014/2017/FY2019 federal US EPA grant competition–all of which were successfully funded resulting in $1 million for projects implemented by Stantec. Grant funded activities performed by Stantec included several Phase I and II ESAs and NR716 site investigations, remedial planning for three market rate apartment redevelopments, and asbestos assessments for historic building renovations.

Though all three grants included redevelopment throughout the County, several high priority brownfield sites were initially identified for assessment near the Sheboygan River in downtown Sheboygan; an area with a long history of commercial and industrial use. Much of the grant funding focused on the City's Fresh-Tech Innovation District near the Blue Harbor hotel which helped secure more than $60 million in redevelopment in the downtown Sheboygan area. Noteworthy redevelopments in downtown Sheboygan leveraged through the US EPA grant funds included a $45 million, 248-unit workforce housing project named The Oscar which included an adjacent Kwik Trip gasoline station; 118 "loft style" apartments with commercial space named Badger State Lofts (home of the century old Badger State Tannery), and the redevelopment of 29 multifamily homes on the former Sheboygan Press Building property which is currently underway. An additional development at a former tannery in downtown Sheboygan Falls named Tannery Falls Apartments, included a 4-story, 40-unit apartment complex with associated greenspace and underground parking. Stantec was recently selected to implement an additional $500,00 US EPA Community-wide Assessment Grant award for Sheboygan County in 2023.

# Bay Lake RPC Community-wide Assessment Grant

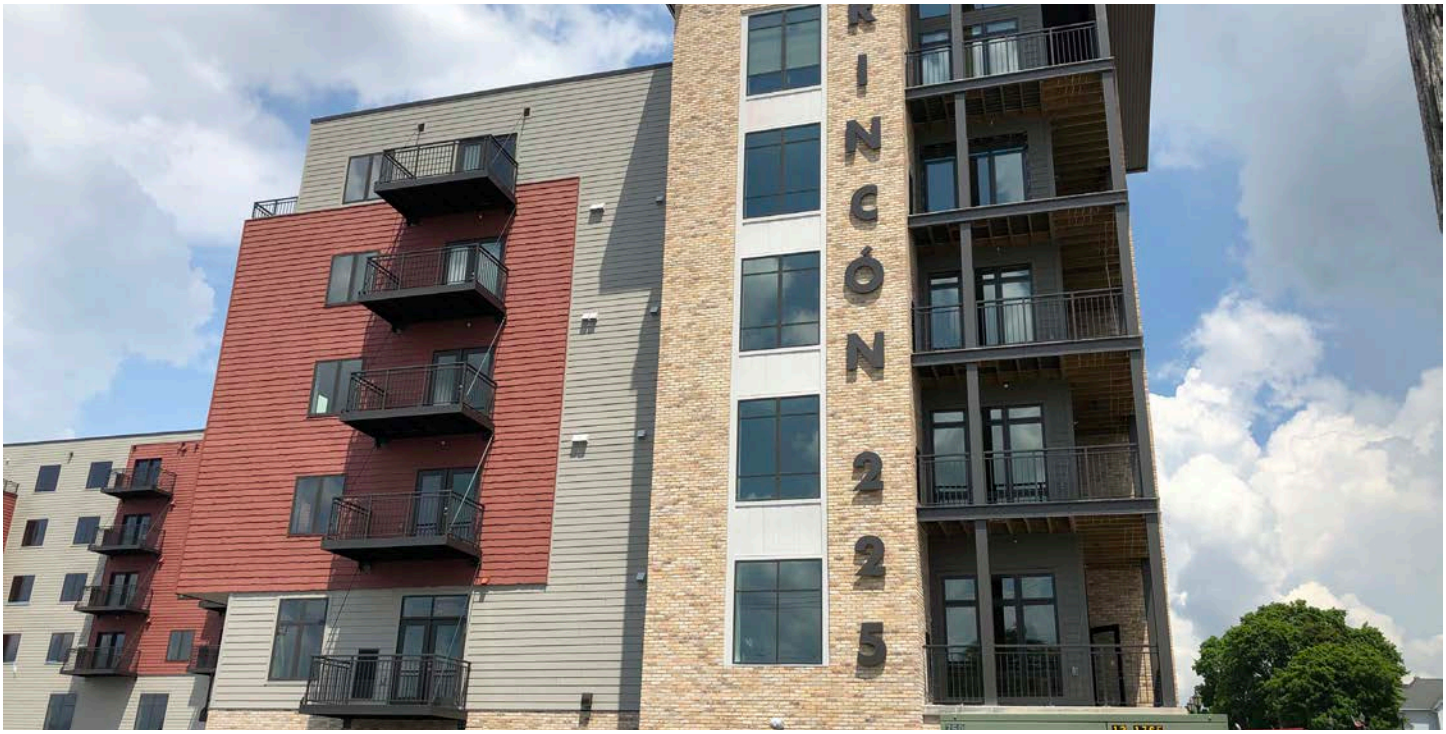
**LOCATION:** Sheboygan County, WI

In 2022, Bay-Lake RPC was awarded a $500,000 Community-Wide Assessment Grant from the US EPA to perform community outreach activities, to inventory, characterize, assess, conduct cleanup and redevelopment planning, and related activities for brownfield sites located in the Bay-Lake RPC region. The target areas for this grant are former commercial and industrial properties in rural communities and tribal lands throughout the region.

Bay-Lake RPC anticipates that 22 Phase I ESAs and seven Phase II ESAs will be completed as part of the project. Furthermore, it is anticipated that three asbestos containing material reports, four site-specific remediation plans/Analysis of Brownfield Cleanup Alternatives (ABCAs), and two redevelopment workshops will be completed.

The scope of work has been organized into five tasks: (Task 1) Grant Management and Implementation, (Task 2) Site Inventory and Community Outreach, (Task 3) Site Assessments (Task 4) Redevelopment Planning, and (Task 5) ACRES and Quarterly Reporting.

Since being retained in May 2023 Stantec has completed one online workshop, two Phase I ESA, one limited site investigation, and one RBM survey.  Additional work is expected to be implemented soon at multiple other sites.




# Washington County Site Redevelopment Program Assistance

LOCATION: Washington County, WI

Stantec assisted Washington County in a project led by the County Community Development Department and support by the Economic Development of Washington County (EDWC) agency. The goal was to integrate the County's redevelopment efforts focused on brownfields with the County's economic development and business retention/recruitment efforts, with a goal of maximizing the extent to which brownfields redevelopment spurs private investment and jobs creation. Stantec served initially on an "economic toolbox" advisory committee for the County's EDWC, one outcome of which was the successful application for a $600,000 US EPA Coalition Brownfields Assessment Grant awarded in 2014, as part of a coalition that included five cities and villages. Stantec, was retained by the County to assist with implementation of grant-funded activities which included a county-wide inventory of brownfield sites, community outreach, and assessment and/or reuse planning for 20 priority brownfields sites. The success of the project was a key factor in the County being awarded a second $600,000 Coalition Assessment Grant by US EPA in 2017. Stantec prepared the application for this second grant and implemented the grant funded activities which included Phase I ESAs on 26 parcels, Phase II ESAs on 15 parcels, asbestos surveys on 3 sites, and remedial action or reuse plans for four properties. In 2020, Stantec assisted in preparation of a successful application for an $800,000 US EPA Brownfields RLF Grant.

In 2017, the Site Redevelopment Program was created using the County's initial US EPA grant, and received a Planning Excellence Award from the American Planning Association Wisconsin Chapter. In 2019, the City of West Bend as Coalition Partner received a US EPA Region 5 Award for Outstanding Contributions in Brownfields Redevelopment for the Barton School

Redevelopment Project at the Brownfields 2019 Conference. This Barton School project also was awarded Wisconsin Policy Forum 2020 Award for Intergovernmental Cooperation.

The SRP resulted in major redevelopment projects on many of the County's most significant brownfield sites. Completed projects to-date include a 68-room hotel (Marriott TownePlace Suites) and 16,000 square foot office building (Water Street Suites) in West Bend, a $5 million office/warehouse (EH Wolf), a $12 million 82-unit apartment building in Hartford (Rincon 225), a $28 million 172-unit apartment complex in Germantown (Saxony Village), and $9.66 million 40-unit apartment complex in West Bend (Barton School Apartments).

Projects in progress include a $35 million 177 unit mixed use development (The District) at the former West Bend Brewery, and a food store in Hartford that will create 200–225 jobs (Festival Foods).

Another key area of success for the SRP supported by Stantec has been a significant increase in the success of local developers and governments in securing State of Wisconsin funding to advance assessment, cleanup, and redevelopment of priority brownfield sites. Since 2016, this effort has resulted in the award at least 7 WEDC brownfield grants totaling $2.3 million to applicants from Washington County: a $146,477 Brownfield Cleanup Grant in 2016 to Hilldale Real Estate LLC for the EH Wolf development; a $150,000 Site Assessment Grant (SAG) in 2017 to the City of Hartford for the Rincon 225 apartments; a $375,000 Brownfields Cleanup Grant to Heritage Place Joint Venture in 2017 for the Saxony Village project; a $499,000 Brownfields Cleanup Grant in 2018 to the City of Hartford for Rincon 225 apartments; a $150,000 SAG in 2018 to the City of West Bend for the Bermico property; a $500,000 Idle Sites Grant in 2020 to the City of West Bend for the former Gehl property; and a $500,000 Brownfields Cleanup Grant in 2021 to HKS Holdings for The District. The seven grants awarded within the past six years, represents an approximate 600% increase from the three State of Wisconsin brownfield grants awarded to applicants from Washington County in the previous 16 years.

Stantec is currently assisting the County and Coalition partners in implementation of the $800,000 US EPA Revolving Loan Fund (RLF) Grant awarded in 2020, $600,000 of County Brownfield Assessment Funds and $1,000,000 in County Brownfield RLF funds appropriated in 2021.

## SRP SUCCESS SINCE 2015... AND COUNTING

### $1,199,000 in SRP Investment

- Site inventory and prioritization
- Community redevelopment plans
- Phase I & II environmental assessments and site investigations
- Remedial action/reuse planning
- Community outreach
- Program leadership and administration

*Total value of in-kind dollars contribute to-date: $346,311

### Impact for Washington County

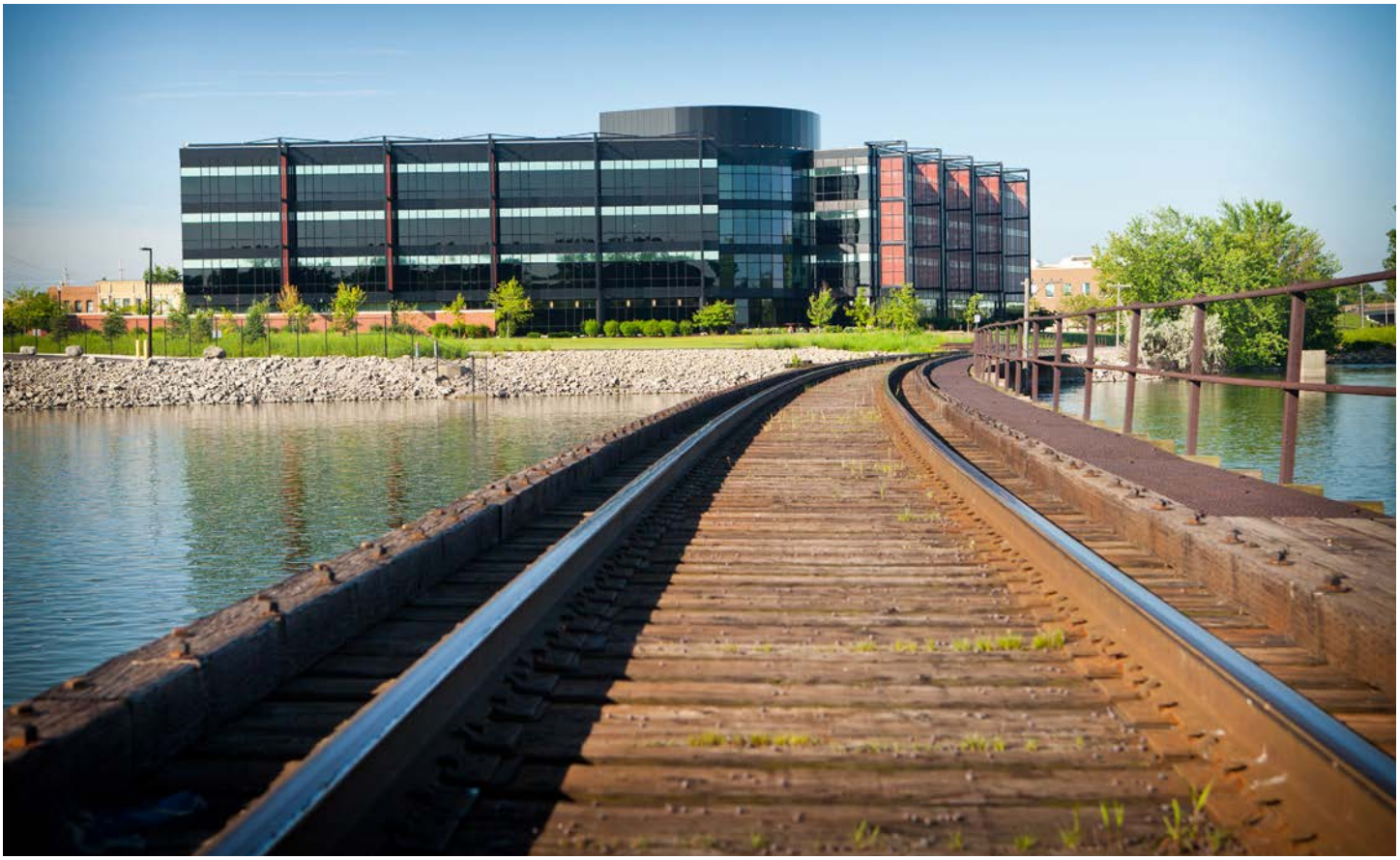
**32**
brownfield acres redeveloped

**294**
new housing units constructed and **68** hotel rooms constructed

**$241,579**
additional investment in environmental assessments

**$2,936,480**
additional investment in abatement, demolitions, or clean up

**$69,560,900**
additional investment in construction



# Neenah and PH Glatfelter Paper Mill Grant Procurement and Implementation

LOCATION: Neenah, WI

This banner project involved transforming a 16-acre site from a closed abandoned paper mill in the heart of the City's downtown to a catalyst mixed use redevelopment destination that includes the Plexus Global headquarters, a health care clinic, two market rate housing redevelopments, Gateway Plaza, Legacy Park, and the Plaza at Gateway Park (an outdoor ice rink and warming shelter). There were numerous challenges associated with redevelopment of this 130-year-old paper mill site that extended over periods of economic uncertainties. The huge size of the specialized mill buildings and the cost associated with their demolition were initial challenges.

In order to reduce costs and to conduct the demolition in a sustainable manner that would maximize reuse of materials, three key strategies were implemented. First, basement floor slabs and foundation walls were left in place throughout a majority of the site to serve as engineered barriers to prevent direct contact with fill materials during construction, and to eliminate the waste of disposing of an enormous volume of material with little associated economic or environmental benefit. Secondly, following asbestos abatement, all inert demolition materials were segregated into materials with and without lead-based painted surfaces. The material without lead-based paint was crushed and reused as fill in portions of the site.

Lastly, the pervasive ash fill material was capped with a two-foot clay cap or another impermeable material (e.g., asphalt or concrete) wherever a slab was absent. During redevelopment of other portions of the site, approval was obtained to place excess ash fill and masonry containing lead-based paint in a screen berm on the adjacent Arrowhead Park. This resulted in significant cost savings to the City and the developer. WDNR closure of three separate WDNR cases has been granted with issuance of a certificate of completion under the VPLE program pending. After more than a decade of revitalization efforts, Stantec is currently overseeing the final remedial efforts associated with the three remaining parcels that make up the former mill site totaling over $100 million in private/public investment at the Site. The project received the Brownfield Renewal National Economic Impact Award.

Before: PH Glatfelter Paper Mill Grant Procurement and Implementation, Neenah, WI

After: PH Glatfelter Paper Mill Grant Procurement and Implementation, Neenah, WI

# Brillion Ironworks Redevelopment

**LOCATION:** Brillion, WI

Acquisition of the 145-acre former Brillion Iron Works ductile iron foundry by the City of Brillion in Wisconsin provided the unprecedented opportunity for a rural community to redevelop a significantly large assembly of land adjacent to the city's downtown core. Project objectives were considered in the context of development constraints and a creative mixed-use redevelopment plan emerged. This distinctive plan envisions an all-residential mix of housing types in the central development area, creating a more cohesive neighborhood and opportunities for shared residential amenities, while supporting/restoring perceived development constraints (i.e. wetlands, floodways) as greenspace. Commercial/retail redevelopment is located along existing arterial roadways to leverage existing infrastructure and light industrial redevelopment is targeted along newly proposed roads to segregate heavy truck traffic from pedestrians and lighter residential and commercial traffic.

Implementation of the reuse plan is underway with the completion of a daycare and a next-generation health care facility targeted for opening in Fall 2023. Environmental investigations are complete in several strategic portions of the property and construction plans are being developed for new buildings. However, implementation is a complex process that will occur over a long period of time. The scale of the project means that multiple development projects will be required for its complete buildout, and in many cases the previous development phase will need to be at or near full occupancy before the next phase can get underway.

# Village of Ashwaubenon's Aldon Station

LOCATION: Ashwaubenon, WI

Through US EPA Brownfield Assessment and Wisconsin Economic Development Corporation (WEDC) grants, Stantec is helping the Village of Ashwaubenon transform a blighted and vacant truck and tractor trailer repair, maintenance, and storage facility along the Fox River into a modern residential redevelopment.

Upon completion, the redevelopment will include the construction of townhomes, twindominiums, and multi-unit residential buildings with amazing views and neighborhood amenities such as walking trails, boat slips, kayak launch, and clubhouse with an outdoor pool. The village purchased the property in 2018, oversaw environmental cleanup activities under the direction of Stantec, and completed infrastructure improvements including streets and utilities to what in now known as Aldon Station, a residential redevelopment within the village limits.

With the help of Stantec, the village was able to achieve its clean closure designation for the single family residential portion of the site and is currently moving forward with construction within the designated Aldon Station neighborhood. In all, the new development will equate to nearly $32 million additional dollars to the tax base before the end of 2023. The original projection to the village was to produce $50 million in tax increment. Estimates are that the development project will surpass that amount by about $20- $30 million by the time it's completed.

Design with
community in mind

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **Finance Department** |
| **FROM:** | **Pamela Manley** |
| **SUBJECT:** | **Consideration and Possible Action on purchase of Tyler Technologies employee access module.*** |

**ATTACHMENTS:**

- Tyler Technologies-Employee Access (PDF)
- City Of De Pere WI Employee Access Quote 5.6.24 (PDF)

# CITY OF DE PERE
# MEMO

To: Honorable Mayor and Members of the Finance Committee
Larry Delo, Administrator
From: Pam Manley, Finance Director
Date: March 12, 2024

RE: **Tyler Technologies-Employee Access**

Included in the Finance Budget for 2023 was $4,890 for Tyler Technologies employee self-service portal for paperless paystubs. We were unable to implement this in 2023 and have been continuing to work with Tyler Tech and our IT Department to find a feasible solution. Currently Tyler Tech is still willing to match our original quote from last year. To avoid additional costs at this time we would only be implementing this change for full-time employees as well as elected officials, CSOs, Engineering Aides and a few other part time positions. This would, however, exclude your seasonals at the Community Center and MSC, poll workers, crossing guards, and other seasonal staff who do not already have a login or use time entry.

At this time, I am requesting approval to move forward with purchasing this module so we can implement it in the next few months. The cost would be covered by my 2024 Budget due to some current year cost savings. With the intent to switch software systems, hopefully by 2026, I would not want to incur any additional costs to add the other seasonal employees at this time.

Please feel free to contact me prior to the meeting with any questions.

**Sales Quotation For:**
City of De Pere
335 S Broadway
De Pere WI 54115-2593
Jennifer Dupont
+1 (920) 339-4047
jdupont@deperewi.gov

| | |
|---|---|
| Quoted BY | Adam Pfaff |
| Quote Expiration | 6/30/24 |
| Quote Name | City of De Pere, WI Employee Access Quote |

| **Tyler Annual Software – SaaS** | |
|---|---|
| Description | Annual |
| **ERP Pro powered by Incode** | |
| ERP Pro 9 Financial Management Suite | |
| Employee Access Pro | $ 490 |
| **TOTAL:** | **$ 490** |

| **Services** | | |
|---|---|---|
| Description | Hours/Units | Extended Price |
| ERP Pro 9 Financial Management Suite | | |
| Professional Services | 32 | $ 4,640 |

| Services<br>Description | Hours/Units | Extended Price |
|---|---|---|
| Other Services | | |
| Project Management | 1 | $ 250 |
| **TOTAL:** | | **$ 4,890** |

| Summary | One Time Fees | Recurring Fees |
|---|---|---|
| Total SaaS | | $ 490 |
| Total Tyler Services | $ 4,890 | |
| **Summary Total** | **$ 4,890** | **$ 490** |

**Comments**

Work will be delivered remotely unless otherwise noted in this agreement.

Expenses associated with onsite services are invoiced as incurred according to Tyler's standard business travel policy.

SaaS is considered a term of one year unless otherwise indicated.

**Client agrees that items in this sales quotation are, upon Client's signature or approval of same, hereby added to the existing agreement ("Agreement") between the parties and subject to its terms. Additionally, payment for said items, as applicable but subject to any listed assumptions herein, shall conform to the following terms, subject to payment terms in an agreement, amendment, or similar document in which this sales quotation is included:**

- License fees for Tyler and third-party software are invoiced upon the earlier of (i) delivery of the license key or (ii) when Tyler makes such software available accessible.
- Fees for hardware are invoiced upon delivery.
- Fees for year one of hardware maintenance are invoiced upon delivery of the hardware.
- Annual Maintenance and Support fees, SaaS fees, Hosting fees, and Subscription fees are first payable when Tyler makes the software accessible to the Client (for Maintenance) or on the first day of the month following the date this quotation was signed (for SaaS, Hosting, and Subscription), and any such fees are prorated to align with the applicable term under the agreement, with renewals invoiced annually thereafter in accord with the Agreement.

**Fees for services included in this sales quotation shall be invoiced as indicated below.**

- Implementation and other professional services fees shall be invoiced as delivered.
- Fixed-fee Business Process Consulting services shall be invoiced 50% upon delivery of the Best Practice Recommendations, by module, and 50% upon delivery of custom desktop procedures, by module.
- Fixed-fee conversions are invoiced 50% upon initial delivery of the converted data, by conversion option, and 50% upon Client acceptance to load the converted data into Live/Production environment, by conversion option. Where conversions are quoted as estimated, Tyler will invoice Client the actual services delivered on a time and materials basis.
- Except as otherwise provided, other fixed price services are invoiced upon complete delivery of the service. For the avoidance of doubt, where "Project Planning Services" are provided, payment shall be invoiced upon delivery of the Implementation Planning document. Dedicated Project Management services, if any, will be invoiced monthly in arrears, beginning on the first day of the month immediately following initiation of project planning.
- If Client has purchased any change management services, those services will be invoiced in accordance with the Agreement.
- Notwithstanding anything to the contrary stated above, the following payment terms shall apply to fees specifically for migrations: Tyler will invoice Client 50% of any Migration Services Fees listed above upon Client approval of the product suite migration schedule. The remaining 50%, by line item, will be billed upon the go-live of the applicable product

suite. Tyler will invoice Client for any Project Management Fees listed above upon the go-live of the first product suite. Annual SaaS Fees will be invoiced upon availability of the hosted environment.

Any SaaS or hosted solutions added to an agreement containing Client-hosted Tyler solutions are subject to Tyler's SaaS Services terms found here: https://www.tylertech.com/terms/tyler-saas-services.

Unless otherwise indicated in the contract or amendment thereto, pricing for optional items will be held For six (6) months from the Quote date or the Effective Date of the Contract, whichever is later.

Customer Approval: _____ Date: _____

Print Name: _____ P.O.#: _____

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **City Attorney** |
| **FROM:** | **Angela Zills** |
| **SUBJECT:** | **Consideration and Possible Action regarding proposed resolution to extend the time period allowed to recognize Reimbursable Grant Revenues after the end of the Fiscal Period. *** |

A draft resolution is attached, which would be brought forward to the Common Council for action, upon recommendation of this Committee.

**ATTACHMENTS:**

- Revenue Recognition (PDF)
- DRAFT-Reso24-XX Extending Time Period Allowed to Recognize Reimburseable Grant Revenues after the end of the Fiscal Period (PDF)

# CITY OF DE PERE
# MEMO

To: Honorable Mayor and Members of the Finance Committee
Larry Delo, Administrator
From: Pam Manley, Finance Director
Date: March 12, 2024

RE: **Revenue Recognition**

During our 2023 audit a discussion was held on the GASB rules for recognizing revenue. The current rule requires that to be recognized as a revenue for the prior year, we must receive the funds within 60 days of the end of the year. This can become an issue for example when you have a reimbursement grant. Often, funds are received after the 60 days resulting in revenues not offsetting expenses in the same fiscal year. It was recommended to pass a resolution that would allow for an extended timeframe of 120 days.

Please feel free to contact me prior to the meeting with any questions.

RESOLUTION #24-XX

EXTENDING THE TIME PERIOD ALLOWED TO RECOGNIZE REIMBURSABLE GRANT REVENUES AFTER THE END OF THE FISCAL PERIOD

WHEREAS, the Governmental Accounting Standards Board (GASB) requires that revenue be recognized within 60 days of the end of the current fiscal period, but allows for an extension of that timeline by resolution of the Common Council; and

WHEREAS, the current 60-day timeline makes it difficult to record grant revenues in the year they should have been collected, as the reimbursement process often extends beyond 60 days; and

WHEREAS, during the City's most recent audit cycle, a discussion was held regarding GASB's rules for recognizing revenue, and a recommendation was made to pass a resolution extending the timeline to 120 days for offsetting expenses.

NOW, THEREFORE, BE IT HEREBY RESOLVED THAT:

> The Common Council considers all reimbursable grant revenue to be available, if collected within 120 days of the end of the current fiscal period, effective January 1, 2023, to December 31, 2023, and for each fiscal year thereafter.

BE IT FURTHER RESOLVED THAT:

> All City officials, officers, employees, and agents are authorized and directed to take such steps as are lawful and necessary in furtherance thereof.

Adopted by the Common Council of the City of De Pere, Wisconsin, this ____ day of _____, 2024.

APPROVED:

_____
James G. Boyd, Mayor

ATTEST:

_____
Carey E. Danen, City Clerk

Ayes: _____
Nays: _____
Board/Committee Approval: _____

DRAFT

**City of De Pere, Wisconsin**

**Request For Finance/Personnel Committee Action**

| | |
|---|---|
| **MEETING DATE:** | **May 14, 2024** |
| **DEPARTMENT:** | **Finance Department** |
| **FROM:** | **Pamela Manley** |
| **SUBJECT:** | **Consideration and Possible Action on the City of De Pere Investment and Cash Detail, March 2024.** |

**ATTACHMENTS:**

- 2024.3 Cash and Investments Memo 5.14.24 (002) (PDF)
- 2024.3 Cash & Investment Reports 5.14.24 (PDF)

# CITY OF DE PERE
# MEMO

To: Honorable Mayor and Members of the Finance Committee
Larry Delo, Administrator
From: Pam Manley, Finance Director
Date: May 14, 2024

RE: **Cash and Investments Report for March 31st, 2024**

I have attached a summary of the City's Cash and Investments for your information and review as of March 31st, 2024. I have also attached last year's monthly summary of the accounts, so you can see comparable activity throughout the course of the year for all accounts. The City's investment return thru March was $328,325.33. In March the City received the Lottery credit payments from the State for an increase in the LGIP of $1,269,467.73. A Fire Dept. FAP grant for $8,859.88 was also received in our LGIP account. The Associated Bank Trust and Charles Schwab Investments saw very little change in market value and increased slightly due to dividend and interest payments or unrealized appreciation. Feel free to contact me should you have any questions on this.

# DE PERE CASH AND INVESTMENTS SUMMARY

3/31/2024

## CASH ACCOUNTS

| CHECKING ACCOUNTS | BALANCE |
|---|---|
| CITY CHECKING | $ 4,338,133.91 |
| REAL & PPT TAX CHECKING | $ 1,000.00 |
| HEALTH CHECKING | $ 1,378,539.11 |
| DENTAL CHECKING | $ 86,124.74 |
| **TOTAL CASH** | **$ 5,803,797.76** |

## INVESTMENTS

| | BALANCE | INTERST AND APPRECIATION | ANNUALIZED RATE OF RETURN |
|---|---|---|---|
| LGIP | $ 18,936,797.56 | $ 238,254.16 | 5.39% |
| ASSOCIATED BANK TRUST | $ 5,145,143.67 | $ 30,770.72 | 2.41% |
| CHARLES SCHWAB INVESTMENTS | $ 6,439,451.41 | $ 26,681.27 | 1.66% |
| MONEY MARKET | $ 7,619,525.82 | $ 32,619.18 | 5.51% |
| **TOTAL INVESTMENTS** | **$ 38,140,918.46** | **$ 328,325.33** | |

| | |
|---|---|
| **TOTAL CASH AND INVESTMENTS** | **$ 43,944,716.22** |

NOTE: The City budgeted $1,400,000 for general fund revenues in the 2024 Adopted Budget.

# DE PERE CASH AND INVESTMENT YEARLY SUMMARY
## March 31, 2024

| | 31-Jan-2024 | 29-Feb-2024 | 31-Mar-2024 | 30-Apr-2024 | 31-May-2024 | 30-Jun-2024 |
|---|---|---|---|---|---|---|
| **CHECKING ACCOUNTS** | | | | | | |
| CITY CHECKING | 8,658,164.85 | 6,546,435.65 | 4,338,133.91 | - | - | - |
| REAL & PPT TAX CHECKING | 15,641,771.63 | 6,514,236.72 | 1,000.00 | - | - | - |
| HEALTH CHECKING | 1,418,730.29 | 1,410,173.44 | 1,378,539.11 | - | - | - |
| DENTAL CHECKING | 86,128.58 | 87,106.05 | 86,124.74 | - | - | - |
| **TOTAL CASH** | **$ 25,804,795.35** | **$ 14,557,951.86** | **$ 5,803,797.76** | **$ -** | **$ -** | **$ -** |
| **INVESTMENTS** | | | | | | |
| LGIP | 17,866,153.79 | 17,658,776.95 | 18,936,797.56 | - | - | - |
| ASSOCIATED BANK TRUST | 5,132,918.84 | 5,127,445.37 | 5,145,143.67 | - | - | - |
| CHARLES SCHWAB INVESTMENTS | 6,446,202.84 | 6,430,877.60 | 6,439,451.41 | - | - | - |
| MONEY MARKET | 1,078,564.79 | 1,083,162.54 | 7,619,525.82 | - | - | - |
| **TOTAL INVESTMENTS** | **$ 30,523,840.26** | **$ 30,300,262.46** | **$ 38,140,918.46** | **$ -** | **$ -** | **$ -** |
| **TOTAL CASH AND INVESTMENTS** | **$ 56,328,635.61** | **$ 44,858,214.32** | **$ 43,944,716.22** | **$ -** | **$ -** | **$ -** |

| | 31-Jul-2024 | 31-Aug-2024 | 30-Sep-2024 | 31-Oct-2024 | 30-Nov-2024 | 31-Dec-2024 |
|---|---|---|---|---|---|---|
| **CHECKING ACCOUNTS** | | | | | | |
| CITY CHECKING | - | - | - | - | - | - |
| REAL & PPT TAX CHECKING | - | - | - | - | - | - |
| HEALTH CHECKING | - | - | - | - | - | - |
| DENTAL CHECKING | - | - | - | - | - | - |
| **TOTAL CASH** | **$ -** | **$ -** | **$ -** | **$ -** | **$ -** | **$ -** |
| **INVESTMENTS** | | | | | | |
| LGIP | - | - | - | - | - | - |
| ASSOCIATED BANK TRUST | - | - | - | - | - | - |
| CHARLES SCHWAB INVESTMENTS | - | - | - | - | - | - |
| MONEY MARKET | - | - | - | - | - | - |
| **TOTAL INVESTMENTS** | **$ -** | **$ -** | **$ -** | **$ -** | **$ -** | **$ -** |
| **TOTAL CASH AND INVESTMENTS** | **$ -** | **$ -** | **$ -** | **$ -** | **$ -** | **$ -** |

# DE PERE CASH AND INVESTMENT YEARLY SUMMARY
## December 31, 2023

| | 31-Jan-2023 | 28-Feb-2023 | 31-Mar-2023 | 30-Apr-2023 | 31-May-2023 | 30-Jun-2023 |
|---|---|---|---|---|---|---|
| **CHECKING ACCOUNTS** | | | | | | |
| CITY CHECKING | 1,870,986.92 | 1,326,744.41 | 1,688,789.25 | 2,348,011.28 | 1,081,401.41 | 877,722.05 |
| HEALTH CHECKING | 1,755,720.84 | 1,709,250.66 | 1,582,427.99 | 1,540,734.47 | 1,564,055.37 | 1,493,879.79 |
| DENTAL CHECKING | 98,034.92 | 99,538.51 | 98,343.69 | 99,183.93 | 90,961.23 | 93,694.35 |
| **SUBTOTAL** | **$ 3,724,742.68** | **$ 3,135,533.58** | **$ 3,369,560.93** | **$ 3,987,929.68** | **$ 2,736,418.01** | **$ 2,465,296.19** |
| **TOTAL CASH** | **$ 3,724,742.68** | **$ 3,135,533.58** | **$ 3,369,560.93** | **$ 3,987,929.68** | **$ 2,736,418.01** | **$ 2,465,296.19** |
| **INVESTMENTS** | | | | | | |
| LGIP | 13,692,384.53 | 13,740,090.86 | 13,803,274.90 | 13,209,784.55 | 13,396,221.04 | 13,459,518.13 |
| ASSOCIATED BANK TRUST | 4,906,570.44 | 4,873,387.33 | 4,941,856.39 | 4,951,046.34 | 4,947,506.81 | 4,935,764.03 |
| CHARLES SCHWAB INVESTMENTS | 6,196,864.06 | 6,164,016.10 | 6,208,110.42 | 6,256,136.34 | 6,248,519.28 | 6,241,934.54 |
| MONEY MARKET | 20,597,891.13 | 14,658,535.08 | 13,712,291.37 | 13,763,969.74 | 12,817,434.30 | 8,862,843.41 |
| **TOTAL INVESTMENTS** | **$ 45,393,710.16** | **$ 39,436,029.37** | **$ 38,665,533.08** | **$ 38,180,936.97** | **$ 37,409,681.43** | **$ 33,500,060.11** |
| **TOTAL CASH AND INVESTMENTS** | **$ 49,118,452.84** | **$ 42,571,562.95** | **$ 42,035,094.01** | **$ 42,168,866.65** | **$ 40,146,099.44** | **$ 35,965,356.30** |

| | 31-Jul-2023 | 31-Aug-2023 | 30-Sep-2023 | 31-Oct-2023 | 30-Nov-2023 | 31-Dec-2023 |
|---|---|---|---|---|---|---|
| **CHECKING ACCOUNTS** | | | | | | |
| CITY CHECKING | (405,973.19) | 573,670.19 | 2,700,540.09 | 678,646.23 | 2,105,885.35 | 22,217,107.75 |
| HEALTH CHECKING | 1,469,062.21 | 1,550,112.01 | 1,597,771.65 | 1,497,590.13 | 1,454,800.95 | 1,461,028.52 |
| DENTAL CHECKING | 94,218.23 | 90,414.94 | 92,341.20 | 94,649.79 | 91,085.51 | 87,103.22 |
| **SUBTOTAL** | **$ 1,157,307.25** | **$ 2,214,197.14** | **$ 4,390,652.94** | **$ 2,270,886.15** | **$ 3,651,771.81** | **$ 23,765,239.49** |
| **TOTAL CASH** | **$ 1,157,307.25** | **$ 2,214,197.14** | **$ 4,390,652.94** | **$ 2,270,886.15** | **$ 3,651,771.81** | **$ 23,765,239.49** |
| **INVESTMENTS** | | | | | | |
| LGIP | 18,467,847.24 | 9,825,140.33 | 18,467,847.24 | 22,265,487.00 | 18,472,177.10 | 17,410,621.92 |
| ASSOCIATED BANK TRUST | 4,943,910.06 | 4,963,993.01 | 4,966,963.40 | 4,982,495.53 | 5,038,343.27 | 5,084,723.76 |
| CHARLES SCHWAB INVESTMENTS | 6,266,819.25 | 6,281,947.66 | 6,291,271.13 | 6,322,570.93 | 6,361,357.81 | 6,412,770.14 |
| MONEY MARKET | 7,698,620.52 | 5,225,914.04 | 3,040,513.16 | 3,054,295.42 | 2,067,319.72 | 1,073,669.92 |
| **TOTAL INVESTMENTS** | **$ 37,377,197.07** | **$ 26,296,995.04** | **$ 32,766,594.93** | **$ 36,624,848.88** | **$ 31,939,197.90** | **$ 29,981,785.74** |
| **TOTAL CASH AND INVESTMENTS** | **$ 38,534,504.32** | **$ 28,511,192.18** | **$ 37,157,247.87** | **$ 38,895,735.03** | **$ 35,590,969.71** | **$ 53,747,025.23** |