

COMMITTEE OF THE WHOLE MEETING AGENDA
TUESDAY, FEBRUARY 4, 2025, 7:00 PM
COUNCIL CHAMBERS, BERLIN CITY HALL, 2ND FLOOR
MEETING IS OPEN TO THE PUBLIC AND IS HANDICAPPED ACCESSIBLE
CITY MEETINGS CAN BE WATCHED LIVE OR RECORDED
ON THE CITY OF BERLIN YOUTUBE PAGE @CITYOFBERLIN5623

1. Roll Call
2. Virtual Attendees Seated (if necessary)
3. General Public Comments. Registration card required (located at podium in Council Chambers).
4. Approval of Minutes. RECOMMENDATION: Approve the minutes from the January 7, 2025 regular session and closed session Committee of the Whole meeting.
5. Presentation of appreciation plaque to Fire Chief Bob Paugels.
6. Review Proposals for Legal Services.
 - a. Interview with Dempsey Law
 - b. Interview with Municipal Law & Litigation Group
7. Review Proposal for Compensation Study. RECOMMENDATION: Recommend to Common Council to approve the proposal by Public Administrative Associates LLC.
8. Update Regarding Request For Proposals for Comprehensive Plan.
9. Review Proposals for Strategic Plan. RECOMMENDATION: Recommend to Common Council to approve a proposal.
10. Motion to convene into closed session pursuant to *Wis. Stats. 19.85 (1) (c) Considering employment, promotion, compensation or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility. AND Wis. Stats. 19.85 (1) (e) Deliberating or negotiating the purchase of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session. Police Union Contract Negotiations.*

And

pursuant to *Wis. Stats. 19.85 (1) (e) Deliberating or negotiating the purchase of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session. Terms and Conditions of To Be Appointed City Attorney Contract.*
11. Reconvene into open session and action as appropriate from closed session discussion.
12. Adjourn.

Note: In adherence to the City of Berlin Public Meeting Participation Policy, public participation will be allowed under each agenda item at the discretion of the presiding officer, with the exception of the Consent Agenda. Attendees must register their intention to participate on either a general comments section or a specific agenda item prior to the meeting by filling out a Registration Card, which can be obtained from the Internet, City Clerk's office or in the City Hall Council Chambers at the podium. Registration Cards should be turned in prior to the meeting to either the presiding officer or City Clerk.

CITY OF BERLIN COMMITTEE OF THE WHOLE MINUTES
TUESDAY JANUARY 7, 2025
COUNCIL CHAMBERS, CITY HALL

1. Roll Call: Mayor Bruessel, Alderperson Durtschi, Alderperson Boeck, Alderperson Stobbe, Alderperson Nigbor, Alderperson Burgess all present. Absent, Alderperson Przybyl, Staff present: City Administrator Balcom; Chris Kalupa, Library Director; Deb Thiel, Deputy Clerk/Treasurer; Tim Ludolph, Planning and Development Director; Matt Chier,, City Attorney
2. Virtual Attendees Seated (if necessary) *None.*
3. Introduction of new City of Berlin Administrator, Jessi Balcom
4. General Public Comments. Registration card required (located at podium in Council Chambers). *None.*
5. Approval of Minutes.
After correction to Alderperson Nigbor's name, Alderperson Burgess made a motion to approve the minutes of the November 5, 2024 Committee of the Whole meeting. Alderperson Stobbe 2nd the motion. Motion passed unanimously.
6. Proclamation recognizing Clem's Bar's 120th Anniversary.
Mayor Bruessel read the Proclamation of Clem's Bar's 120th Anniversary. Alderperson Stobbe made a motion to move to the Common Council meeting. Alderperson Nigbor 2nd the motion. Motion passed unanimously.
7. Proposals for development of strategic plan (information only, no recommendation at this time).
Two strategic plan proposals received from Allyson Brunette and CP2 Consulting. Council made the decision to put on the February Council meeting so they have time to look at both proposals.
8. Proposals for development of comprehensive capital improvement plan (information only, no recommendation at this time).
Two capital improvement plans received from Baird and MSA. Council made the decision to put on the February Council meeting so they have time to look at both proposals.
9. Proposal for compensation study and plan (information only, no recommendation at this time).
Three firms were asked to send proposals. PAA is the only firm to submit information. Council made the decision to put on the February Council meeting so they have time to look at the proposal.
10. Request for proposals for general legal counsel.
After discussion between Attorney Chier and the Council it was decided to put this agenda item on the next common council meeting.
11. Motion to convene into closed session pursuant to Wis. Stats. 19.85 (1) (c) Considering employment, promotion, compensation or performance evaluation data of any public employee

over which the governmental body has jurisdiction or exercises responsibility.
Police Union Contract Negotiations.

AND

Wis. Stats. 19.82 (1) (e) Deliberating or negotiating the purchasing of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session. Tax Incremental District No. 16 Development Agreement Nicolet Lumber, Inc. Motion made by Alderperson Nigbor to go into Closed Session at 7:25pm. Alderperson Stobbe 2nd the motion. Roll Call: Alderperson Boeck – yay, Alderperson Burgess - yay, Alderperson Durtschi – yay, Alderperson Nigbor – yay, Alderperson Przybyl – Absent, Alderperson Stobbe - yay. Alderperson Boeck made a motion to seat Jim Macy, Special Legal Counsel, VonBriesen &Roper and Deb Thiel. Alderperson Nigbor 2nd the motion. Voice vote was unanimous.

Alderperson Boeck made a motion to seat Tim Ludolph, Planning and Development Director at 7:37pm. Alderperson Nigbor 2nd the motion. Voice roll call was unanimous.

Alderperson Nigbor made a motion go back into open session at 8:02pm. Alderperson Stobbe 2nd the motion. Roll Call: Alderperson Boeck – yay, Alderperson Stobbe – yay, Alderperson Burgess – yay, Alderperson Przybyl – absent, Alderperson Durtschi – yay, Alderperson Nigbor, yay.

Alderperson Durtschi made a motion to adjourn the meeting at 8:03pm. Alderperson Stobbe 2nd the motion. Roll Call: Alderperson Burgess – yay, Alderperson Przybyl – absent, Alderperson Durtschi – yay, Alderperson Boeck – yay, Alderperson Nigbor – yay, Alderperson Stobbe – yay.

Respectfully submitted by Debbie Thiel, City Clerk Treasurer

**CITY OF BERLIN
COMMITTEE OF THE WHOLE MEETING
STAFF REPORT**

TO: Common Council
FROM: Jessi Balcom, City Administrator
AGENDA ITEM: Review of Proposal for City Attorney
MEETING DATE: February 4, 2025

BACKGROUND

The City issued a Request for Proposals for City Attorney on January 15, 2025. Proposals were due to the City by noon on Wednesday, January 29.

Three proposals were received. Two of the proposers have been invited to interview with the Council (as outlined in the published RFP).

Dempsey Law: Lead Attorney – Lee D. Turonie. The proposal is attached.

Municipal Law & Litigation Group – Lead Attorney – Eric J. Larson. The proposal is attached.

Luke Dretske: This proposal was found not to meet the requirements of the RFP. Mr. Dretske will not obtain his law degree and be admitted to the Wisconsin Bar Association until after the new city attorney will assume the position. I contacted Mr. Dretske and thanked him for his proposal and dedication to the City of Berlin, while explaining that I could not recommend a proposal to the Common Council that would not provide a city attorney on May 1 as outlined in the Request for Proposals (“No later than May 1, 2025 (Preferred March 1, 2025) Effective date for selected attorney/firm to become City Attorney.”)

Interviews with Mr. Turonie and Mr. Larson are scheduled via zoom or in person during the February 4, 2025 Committee of the Whole meeting. A closed session has been put on the agenda to allow the Council to discuss the City Attorney contract at the end of the meeting.

It is anticipated that the Mayor will appoint the City Attorney, with approval of the Council at the February 11 Common Council meeting. This appointment will complete the remaining portion of Attorney Chier’s appointment through April 30, 2025. The same attorney will have to be reappointed through April 30, 2026 by the newly seated Mayor at the Organizational Meeting on the third Tuesday of April.

DEMPSEY LAW FIRM, LLP
www.dempseylaw.com

500 N. 3rd St., Ste 420
Wausau, WI 54403

715.848.2966 TEL
920.235.2011 FAX

WRITER'S DIRECT
715.848.2966 ext. 502
ldf@dempseylaw.com



DEMPSEY LAW

OFFICES:
Black River Falls
De Pere
Fond du Lac
Oshkosh
Waupun
Wausau

January 29, 2025

Via email

City of Berlin
Attn: Legal Services Proposal
108 N Capron Street
P.O. Box 272
Berlin, WI 54923
cityadministrator@cityofberlin.wi.gov

Re: RFP for City Attorney

Dear City Officials:

We have reviewed the City of Berlin's Request for City Attorney Services Proposals. The Dempsey Law Firm, LLP is pleased to hereby submit our proposal.

1. Experience and qualifications of firm.

a. Narrative description of the Dempsey Law Firm.

The Dempsey Law Firm, LLP ("Dempsey") originated in Oshkosh and acquired the former Fond du Lac firm of Edgerton, St. Peter, Petak & Rosenfeldt ("Edgerton Firm") in 2018. The Edgerton firm is where Attorney John St. Peter acquired over 45 years of experience practicing municipal law, taking that over from his father before him. The Edgerton Firm is also where Attorneys Matthew Parmentier and Alex Ackerman began practicing municipal law. They now have 15- and 8-years' experience, respectively. Attorney Parmentier is a past Chairperson of the State Bar of Wisconsin's Administrative and Local Government Law Section.

Dempsey opened doors in Wausau in 2019 after acquiring the Byrne Law Firm. Attorney Lee D. Turonie joined the Wausau office in 2020 and has 19 years' experience primarily in municipal law. Attorney Samuel Jack also joined Dempsey and its municipal law team and has 16 years' experience. Dempsey has offices in Black River Falls, De Pere, Fond du Lac, Oshkosh, Waupun, and Wausau.

b. Experience at Dempsey.

Dempsey has been a main provider of municipal legal services in east central Wisconsin for several decades. We have expanded that original footprint with our team of attorneys practicing municipal law, while our other attorneys practice in many other subject areas. Our full roster of attorneys can be seen on our website here: <https://www.dempseylaw.com/>.

Our municipal attorneys have worked with all elements of municipal law as they primarily act as the municipal attorney for communities that are not large enough to employ a full-time attorney in house: just like Berlin.

For example, we: have reviewed and/or drafted entire codes of ordinances including all manner of topics; enforced ordinances; dealt with highway and contracting issues; participated in or run different types of meetings and hearings; prepared timely responses to records requests; handled land use issues, real estate, and development projects; legal compliance, including environmental; counsel to officers and bodies; assisted with dispute resolution and employment matters; etc. We have experience with both urban and rural areas.

c. Philosophy on services.

The attorney’s role is to advise and execute tasks but it is not to set municipal policy. Another often-overlooked area is training that can be provided to City personnel.

The level of involvement in different municipal activities usually varies by the municipality. It often depends on the experience of staff members and elected officials; and also, the difficulty of the task at hand or at times the environment. Due to those factors the level can vary over time and we adjust to that as necessary.

Usually, a little attorney work is what prevents a lot of attorney work later on. Good communication is key to this and goes both ways. Prevention is the best way to save money on legal fees.

2. Proposed Attorney(s).

a. Lead Attorney: Lee D. Turonie.

Dempsey would utilize Lee D. Turonie as the lead attorney for the City. Lee works full-time as a municipal attorney and has over 19 years experience. The rest of Dempsey’s municipal team is available to assist Lee.

Lee spent two-years at a circuit court clerkship, mediating small claims and landlord tenant cases weekly. For 8.5 years at the Wisconsin Towns Association, Lee responded to municipal questions from a statewide membership, designed and provided educational programs on various topics for municipal officials throughout the state, and was involved in the drafting of some of the state statutes on municipal law. Lee has been serving municipalities in private practice for over nine years now.

b. Resume information for Lee D. Turonie:

Experience:	Private Legal Practice as a Municipal Attorney	2016-present
	Wisconsin Towns Association Legal Counsel & Lobbyist	2007-2015
	La Crosse County Law Clerk & Small Claims Mediator	2005-2007
Education:	J.D., University of Wisconsin Law School	2002-2005
	B.A., University of Wisconsin-Madison	1997-2001

Continuing Legal Education: to stay current Lee has attended every Town Attorneys Conference by the Towns Association since 2008; and every Municipal Attorneys Institute by the League of Wisconsin Municipalities since 2008 but one due to a conflict.

3. References.

Dempsey represents over a hundred municipal entities: mostly cities, villages, towns, special purpose districts, and less often counties and school districts. Some representative clients of Lee include the following:

City of Abbotsford, Josh Soyk, Administrator, 715-223-3444 ext. 102.

Village of Kronenwetter, Chris Voll, President, 715-409-6623.

Town of Mosinee, Stephen Hagman, Chairperson, 715-551-4049.

More can be provided at your request.

4. Compensation.

The below "Addendum A - Hourly Rates" shows that rates vary by personnel and Dempsey charges an hourly rate to the 1/10th of an hour. Rates are reviewed at the end of each year. Overall, we charge for the work that we do, but do not charge if not doing something for the City.

Our use of an attorney other than the assigned attorney on a project is typically done in further consultation with a client. Our municipal attorneys generally provide the full range of services needed. The City is able to terminate its use of Dempsey at any time.

Travel fees are listed in our retainer as time and mileage at the IRS business rate. However, no matter how close or far a particular client is, we have found that almost all contact is typically email, teleconference, or videoconference. We are willing to negotiate on travel fees and arrangements.

5. Conflicts of Interest

A conflict check performed just now shows that we have no current conflicts.

Conclusion:

We are pleased to offer you this proposal for City Attorney Services. We can supply clarifications and/or more information as desired. Thank you for this opportunity to be of service to the City.

Sincerely,
DEMPSEY LAW FIRM, LLP



Lee D. Turonie

**ADDENDUM A
HOURLY RATES¹**

The following is a list of the professionals and their hourly rate for all time expended².

Municipal Lawyers/Staff

Name	Position	Hourly Rate
John A. St. Peter	Senior Partner	\$300.00
Matthew B. Parmentier	Partner I	\$300.00
Lee D. Turonie	Senior Associate	\$270.00
Alex R. Ackerman	Associate III	\$265.00
Samuel W. Jack	Of Counsel I	\$260.00

Other Professionals

Law Clerks	Clerk	\$150.00
Paralegals	Paralegal I	\$130.00
Other Assistants	Assistant I	\$105.00

¹ Rates as of January 1, 2025

² Please note that not all of these professionals will work on your file. If you have questions about who will work on your file, please contact the attorney you are entering into this Agreement with.

Municipal LAW

& LITIGATION GROUP

DALE W. ARENZ (1935-2022)
DONALD S. MOLTER, JR. (Retired)
JOHN P. MACY
H. STANLEY RIFFLE (Court Commissioner)
ERIC J. LARSON
REMZY D. BITAR

730 N. GRAND AVENUE
WAUKESHA, WISCONSIN 53186
Telephone (262) 548-1340
Direct (262) 806-0212
Facsimile (262) 548-9211
Email: rbitar@ammr.net

PAUL E. ALEXY
MATTEO REGINATO
LUKE A. MARTELL
SAMANTHA R. SCHMID
CHRISTOPHER R. SCHULTZ
LUCAS C. LOGIC
GREGORY M. PROCOPIO
BENJAMIN T. CROCKETT
ADAM J. MEYERS
SAVANNA M. GAIN

STEPHEN J. CENTINARIO, JR.
MICHAEL J. MORSE
JAMES P. WALSH

January 28, 2025

City of Berlin
Attn: Legal Services Proposal
108 N. Capron Street
P. O. Box 272
Berlin, WI 549223

**Re: Proposal for Legal Services
Legal Services**

To Whom It May Concern:

I am writing in response to your request that I provide a proposal for the City of Berlin legal services. I welcome this opportunity to offer our services.

I believe our firm stands out in our commitment to representing municipalities, in the breadth of our knowledge of municipal law and municipal practices, and in our ability to respond to your needs quickly and efficiently without compromise.

We are a municipal law firm, all day, every day. This is what we do. We work with municipalities throughout the State of Wisconsin both as the municipal attorney of record (about 60 municipalities) and as special counsel (about another 50 municipalities). We also represent dozens of municipalities throughout the State of Wisconsin in insurance defense matters, with more than 100 active cases pending at all levels of state and federal court – we even received a favorable decision for St. Croix County from the United States Supreme Court.

Our practice is somewhat unique in the State of Wisconsin. While many law firms engage in the practice of municipal law, very few do so exclusively. Of the ones that do so exclusively, we are significantly larger, and therefore have been fortunate to serve clients statewide. We believe our model provides us with a wide perspective on the issues faced by municipalities. That perspective allows for an exceptional ability to quickly understand the legal issues that you may face along with the ability to quickly offer solutions that have worked to solve such issues, and the experience to implement those solutions on your behalf. Thank you for considering our proposal.

MUNICIPAL LAW & LITIGATION GROUP, S.C.

City of Berlin
January 28, 2025
Page 2

I would be proud to serve the City of Berlin. We serve our municipal clients as outside independent contractors, and are not City employees, so we are not eligible for employee fringe benefits.

I have been authorized to bind the firm to this proposal and cost schedule. You may direct all correspondence and communication regarding this proposal to me, at the address, telephone number and email address noted above. If you should have any questions or concerns, I would be happy to follow up at any time on request.

Yours very truly,

MUNICIPAL LAW & LITIGATION GROUP, S.C.

Eric J. Larson

Eric J. Larson

EJL/jd
Enclosures

Municipal LAW
& LITIGATION GROUP

DALE W. ARENZ (1935-2022)
DONALD S. MOLTER, JR. (Retired)
JOHN P. MACY
H. STANLEY RIFFLE (Court Commissioner)
ERIC J. LARSON
REMZY D. BITAR

730 N. GRAND AVENUE
WAUKESHA, WISCONSIN 53186
Telephone (262) 548-1340
Direct (262) 806-0215
Facsimile (262) 548-9211
Email: elarson@ammr.net

PAUL E. ALEXY
MATTEO REGINATO
LUKE A. MARTELL
SAMANTHA R. SCHMID
CHRISTOPHER R. SCHULTZ
LUCAS C. LOGIC
GREGORY M. PROCOPIO
BENJAMIN T. CROCKETT
ADAM J. MEYERS
SAVANNA M. GAIN

STEPHEN J. CENTINARIO, JR.
MICHAEL J. MORSE
JAMES P. WALSH

**City of Berlin
Proposal for Legal Services**

Eric J. Larson

Date of Submission: January 28, 2025

MUNICIPAL LAW & LITIGATION GROUP, S.C.

City of Berlin Legal Services Proposal
January 28, 2025

A. Letter of Transmittal. (See attached.)

B. Table of Contents.

C. Executive Summary.....	Page 2
D. Proposal Content.....	2
1. Hourly Cost for Services	2
2. Resume	2
3. References	4
4. Philosophy	4
5. Conflicts of Interest	5
6. Closing Thoughts	5

C. Executive Summary

This proposal is for corporation counsel legal services to the City of Berlin. Our entire practice is devoted to representing municipalities and municipal interests. We believe we have unmatched experience in all of the fields of general municipal law, because we represent more than 200 municipalities in various capacities. Our fees are reasonable, and given our experience we believe we can perform the work in a fraction of the time that might be required by others, resulting in lower costs to you. We consider ourselves to be experts in our one area of practice, and we have the necessary depth in our attorney and paralegal staff to promptly serve every need that may arise. Thank you for considering our proposal.

D. Proposal Content

1. Hourly cost for services, as well as other itemized billing that the City would expect to incur or be responsible for.

Our billing rate for regular municipal work is \$221 per hour, and that would apply to this representation of the City of Berlin. Our time is charged portal to portal for work outside the office. Billing increments are tenths of an hour, with a minimum charge of \$30 for reviewing documents/emails/messages and a minimum charge of \$35 for all other work. All of our attorneys charge the same rates. We invoice monthly, with each time entry itemized.

If any expenses are incurred on your behalf, which is not common, that would be subject to prior approval and would be itemized on the billing statement. We have a full Westlaw subscription, all states and federal, with a municipal package that is included in our services, so online legal research is not billed to you.

2. Personal resume of the applicant

We offer Eric J. Larson to serve as the City Attorney. Eric has practiced municipal law for more than 34 years. Eric’s current principal responsibilities include being the lead attorney for several of the firm’s clients. Eric assists in the representation of all of the firm’s municipal clients. Eric is also a regular speaker at municipal conferences hosted by the Wisconsin Towns Association, the League of Wisconsin Municipalities and other municipal government groups and entities, and is the recipient of a “Leaders in the Law” recognition by the

MUNICIPAL LAW & LITIGATION GROUP, S.C.

City of Berlin Legal Services Proposal
January 28, 2025

Wisconsin Law Journal and repeatedly as a "Super Lawyer" by Thompson Reuters.

While Eric will be the lead attorney, the attorneys assigned in our office to work for the City of Berlin include every member of our firm depending on the issue that may be involved. In our firm, each of the individual attorneys has special expertise, so we would assign the attorney that is most qualified to address the particular issues involved. General municipal issues are primarily handled by Eric. Litigation related matters would likely be assigned to Remzy Bitar, Stan Riffle or Paul Alexy. Other attorneys and paralegals within the office would likely participate in the representation depending upon the issues involved. A short profile of our attorneys is as follows, and more complete biographical information is available in the attached municipal resume and on our website (www.municipallawsc.com).

Paul E. Alexy
Municipal Attorney since 1987

Remzy D. Bitar
Municipal and Civil Rights Litigator
Insurance Defense since 2001

Stephen J. Centinario, Jr.
Traffic Prosecutor
Former Deputy Waukesha County D.A.

Benjamin T. Crockett
Municipal Attorney since 2022

Savanna M. Gain
Municipal Litigator since 2024

Eric J. Larson, Shareholder
Municipal Lawyer since 1990

Lucas C. Logic
Municipal Litigator since 2021

John P. Macy, Shareholder
Municipal Attorney since 1980

Luke A. Martell
Municipal Litigator since 2016

Adam J. Meyers
Municipal Litigator since 2020

Michael J. Morse
Municipal Attorney since 1981
Former City of Menomonee Falls City
Attorney

Gregory M. Procopio
Municipal Litigator since 2022

Matteo Reginato
Municipal Litigator since 2013

H. Stanley Riffle, Shareholder
Municipal Attorney since 1980

Samantha Schmid
Municipal Litigator since 2014

Christopher R. Schultz
Traffic Prosecutor since 2009

James P. Walsh
Municipal Attorney since 1985

Jaime Staffaroni
Municipal Litigator since 2004
(commencing January 30, 2025)

Please see the attached firm resume.

MUNICIPAL LAW & LITIGATION GROUP, S.C.

City of Berlin Legal Services Proposal
January 28, 2025

Our specialty is the practice of municipal law, and all of its various aspects. So, for example, on development issues, we have a thorough understanding of the municipal perspective, and the terms that municipalities should require to best protect the municipal interests and ensure that development projects are successful for the community. In real estate matters, we are experts in knowing how municipalities should buy and sell land and property. We have expertise in all areas of municipal regulation, whether alcohol beverage licensing, short-term rentals, and all other regulatory issues faced by municipalities routinely. We do not represent developers, we do not represent private interests who appear before municipalities or sue municipalities, so our advice to you is never compromised by those relationships. You always receive advice from our firm that fairly and appropriately reflects the municipal interest in the legal issues. As we do this for dozens of municipalities throughout the state, there are rarely issues that you will face that we have not considered previously on behalf of other municipal clients.

3. References

A list of all current municipal government clients is included in the attached municipal resume.

Please feel free to contact any one of our clients identified therein. Particular client contacts and phone numbers that may be of interest are these:

City of Fox Point
Client since 2004, Serve as City Attorney; all municipal representation
Scott Botcher, City Manager
7200 Santa Monica Blvd.
Fox Point, WI 53217
414-351-8900
sbotcher@Cityoffoxpoint.com

City of Slinger
Client since 2009, Serve as City Attorney; all municipal representation
Margaret Wilber, City Administrator
300 Slinger Road
Slinger, WI 53086-0227
262-644-5265
mwilber@vi.slinger.wi.gov

4. Statement of personal philosophy

Our philosophy is that we provide legal advice, and leave the policy choices to the public officials. When we begin work with a new client, we bring no set agenda to the relationship. We want to serve the client in the way that the client wants to be served. If we are selected we would request the opportunity to meet with you in person, tour the community with you, be briefed on any pending hot topics, and establish basic expectations that you have for our services. In that meeting we would clarify who within the City is authorized to contact us and assign projects, what regular meetings require our attendance

MUNICIPAL LAW & LITIGATION GROUP, S.C.

City of Berlin Legal Services Proposal
January 28, 2025

whether in person or remote, and the practices that will be employed to ensure our advice can be proactive rather than reactive in our service to the community.

5. Statement concerning conflicts

We do not envision having conflicts. That said, certainly if conflicts would arise, we would advise you of the conflict, and if it cannot be waived, we would recommend that you seek special counsel.

6. Closing thoughts

Our firm was created in 1984, when a core group of attorneys separated from a previous law firm in order to focus exclusively on the representation of municipalities. The firm has existed continuously, with this same municipal law focus for 40 years. We currently have fifteen full-time lawyers in the office, three attorneys who assist part-time, two law clerks and four paralegals all dedicated exclusively to the practice of municipal law. We only represent municipalities, not developers or other entities that might appear before municipalities or might contest actions taken by municipalities.

Our practice is somewhat unique in the State of Wisconsin. While many law firms engage in the practice of municipal law, very few do so exclusively. Of the ones that do so exclusively, we are significantly larger, and therefore have been fortunate to serve clients statewide. We believe our model provides us with a wide perspective on the issues faced by municipalities. That perspective allows for an exceptional ability to quickly understand the legal issues that you may face along with the ability to quickly offer solutions that have worked to solve such issues, and the experience to implement those solutions on your behalf. Thank you for considering our proposal.

Municipal LAW

& LITIGATION GROUP

DALE W. ARENZ (1935-2022)
DONALD S. MOLTER, JR. (Retired)
JOHN P. MACY
H. STANLEY RIFFLE (Court Commissioner)
ERIC J. LARSON
REMZY D. BITAR

730 N. GRAND AVENUE
WAUKESHA, WISCONSIN 53186
Telephone (262) 548-1340
Direct (262) 806-0215
Facsimile (262) 548-9211
Email: elarson@ammr.net

PAUL E. ALEXY
MATTEO REGINATO
LUKE A. MARTELL
SAMANTHA R. SCHMID
CHRISTOPHER R. SCHULTZ
LUCAS C. LOGIC
GREGORY M. PROCOPIO
BENJAMIN T. CROCKETT
ADAM J. MEYERS
SAVANNA M. GAIN

STEPHEN J. CENTINARIO, JR.
MICHAEL J. MORSE
JAMES P. WALSH

ERIC J. LARSON

Born in Northfield, Minnesota, November 20, 1964; admitted to Minnesota State Bar, 1990, U.S. District Court, District of Minnesota, 1992, Wisconsin State Bar, 1994, and U.S. District Court, Eastern District of Wisconsin, 1995.

EDUCATION

Earlham College (B.A., All College Honors, 1987); University of Minnesota Law School (J.D., 1990).

MEMBERSHIPS

Waukesha County Bar Association: Municipal Law Section.
State Bar of Wisconsin: Administrative and Local Government Law Section.
American Bar Association: Section of State and Local Government Law.
Judicial Clerk, 8th Judicial District, Minnesota (1990-1992).
Assistant County Attorney: McLeod County, Minnesota, (1992-1994).
Municipal Law & Litigation Group, S.C., (1996-present)
Adjunct Faculty, Carroll College, "Land Use Law and Policy" course (2003).
Chair, Waukesha County Bar Association, Municipal Section (2005 - present).

Lecturer on municipal law topics sponsored by the League of Wisconsin Municipalities (1997, 2008, 2009, 2010, 2011, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023) (President in 2024), the Wisconsin Town's Association (1997, 1998, 2006, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2024), the Waukesha County Bar Association, Municipal Law Section (2004), Waukesha County Technical College (2007, 2008); Wisconsin City/City Manager Association Regions 7 and 9 (2012) and State convention (2019); New Clerk's School, Wisconsin Clerk's and Treasurer's Institute, University of Wisconsin Extension (2014), Wisconsin Clerks Association (2017, 2021), Wisconsin Association for Public Procurement and Value in Government (2017), National Business Institute (2017, 2019, 2020, 2021, 2022, 2023), Strafford Webinar (2017, 2018, 2019), Wisconsin Association of County Corporation Counsels (2018), American Public Works Association (2019), Wisconsin Municipal Judge's Association (2019) and State Bar of Wisconsin (2022, 2025). Sample programs include:

New Era of Zoning and Land Use
Small Cellular Technology Roll Out
Constitutional Issues in Municipal Regulation
Liquor Licensing
Conditional Use Authority
Municipal Regulation of Telecommunications
Shared Municipal Services
Terminating Intermunicipal Agreements
Urban Agriculture Legal Issues
Officers and Employees
Municipal Ethics
Trees, Weeds and Stormwater Regulation
Solutions to Stalled Development

Public/Private Partnerships
Single-Family Residential Zoning Issues
Public Records Laws
Open Meetings Laws
Municipal Best Practices
Financial Guarantees
Regulation of Signs
Permit Hearings
Service Animals and Public Facilities
Municipal Contracting
Municipal Risk Management
Zoning, Annexation, Land Use

Eric received the prestigious "Leader in the Law" Award from the Wisconsin Law Journal in 2015 and "Super Lawyer" Award annually for many years. More information about our firm and our attorneys is available on our website: www.municipallawsc.com

MUNICIPAL LAW & LITIGATION GROUP, S.C.

MUNICIPAL RESUME

Our law firm, MUNICIPAL LAW & LITIGATION GROUP, S.C., has seventeen attorneys and 2 law clerks, and is engaged in the general practice of law, with a heavy emphasis on municipal law, throughout Wisconsin. Our firm presently represents the following municipal entities.

REPRESENTATION

MUNICIPAL:

City of Cudahy	Town of Erin
City of Oconomowoc	Town of Genesee
City of Pewaukee	Town of Hartford
City of St. Francis	Town of Herman
Village of Butler	Town of Ixonia
Village of Dousman	Town of Jackson
Village of Fox Point	Town of Jacksonport
Village of Greendale	Town of Jefferson
Village of Jackson	Town of LaGrange
Village of Nashotah	Town of Lake Mills
Village of North Bay	Town of Lisbon
Village of North Prairie	Town of Lowell
Village of Oconomowoc Lake	Town of Mukwonago
Village of Palmyra	Town of Ottawa
Village of Pleasant Prairie	Town of Raymond
Village of Random Lake	Town of Troy
Village of Reeseville	Town of Wayne
Village of Richfield	Town of Westfield
Village of Rochester	Jefferson County
Village of Sherwood	Allenton Sanitary District No. 1
Village of Slinger	Blackhawk Sanitary District
Village of Summit	Dane County Towns Association
Village of Sussex	Delavan Lake Sanitary District
Village of Vernon	Dousman Fire District
Village of Waukesha	Eagle Spring Lake Management District
Village of West Milwaukee	Genesee Lake Utility District (Summit)
Village of Wind Point	Hilldale Sanitary District
Town of Addison	Ixonia Sanitary District No. 1
Town of Ashippun	Ixonia Sanitary District No. 2
Town of Aztalan	Pike Lake Utility District
Town of Christiana	Silver Lake Sanitary District
Town of Cold Spring	Silver Lake Utility District (Summit)
Town of Delafield	Summit Fire District
Town of Eagle	Summit Utility District No. 2
	Summit Utility District No. 3

MUNICIPAL INSURANCE DEFENSE:

League of Wisconsin Municipalities Mutual Insurance Co. (LWMMI)
Wisconsin Municipal Mutual Insurance Co. (WMMIC)
Cities and Villages Mutual Insurance Co. (CVMIC)
Rural Mutual Insurance

MUNICIPAL LAW & LITIGATION GROUP, S.C.

CONSULTANT TO:

City of Adams	Town of Farmington
City of Altoona	Town of Gingles
City of Black River	Town of Hayward
City of Brookfield	Town of Harmony
City of Fond du Lac	Town of Harrison
City of Franklin	Town of Holland
City of La Crosse	Town of Kewaskum
City of Madison	Town of Lamont
City of Manitowoc	Town of Mercer
City of Manitowoc Police and Fire Comm.	Town of Merton
City of Mequon	Town of Pierce
City of Mequon Zoning Board of Appeals	Town of Pleasant Springs
City of Milwaukee Zoning Board of Appeals	Town of Port Washington
City of Muskego	Town of Randall
City of Oconomowoc Zoning Board of Appeals	Town of Sanborn
City of Oshkosh	Town of Sheboygan
City of Sheboygan	Town of Spring Prairie
City of Watertown	Town of Sugar Creek
City of Waukesha	Town of Theresa
City of Wausau	Town of Wautoma
City of West Bend	Town of Westford
Village of Adell	Town of Westport
Village of Brown Deer	Town of White River
Village of Campbellsport	Town of Woodboro
Village of Elm Grove	County of Chippewa
Village of Fontana	County of Dane
Village of Hales Corners	County of Jefferson
Village of Hortonville	County of Kenosha
Village of Kewaskum	County of La Crosse
Village of Kingston	County of Manitowoc
Village of Lake Delton	County of Marathon
Village of Menomonee Falls	County of Outagamie
Village of Mukwonago	County of Rock
Village of Newburg	County of St. Croix
Village of North Fond du Lac	County of Walworth
Village of Pewaukee	County of Washington
Village of Sister Bay	Waukesha County Technical College
Village of Sturtevant	Arrowhead High School District Area Schools
Town of Ashland	Dane Town Board of Zoning Appeals and Adjustment
Town of Barton	Delafield-Hartland Water Pollution Control Commission
Town of Bass Lake	Kimberly Area School District
Town of Beloit	Merton School Joint District No. 9
Town of Burnett	Milwaukee County Ethics Commission
Town of Caledonia	North Lake Management District
Town of Cedarburg	Oconomowoc School District
Town of Cross Plains	Racine Water Utility
Town of Dupont	Sauk Prairie Police Commission
Town of Eldorado	Winneconne Sanitary District #3

MUNICIPAL LAW & LITIGATION GROUP, S.C.

As a general rule, we do not represent citizen groups in matters involving municipal matters. As an absolute rule, we never represent developers.

Our firm is currently rated AV by Martindale-Hubbell. Our firm has been named as a national First Tier "Best Law Firm" by *U.S. News & World Report*, Land Use and Zoning for multiple years in a row and a First Tier "Best Law Firm Milwaukee Metropolitan Region" for Administrative/Regulatory Law, Land Use and Zoning Law, and Municipal Law for multiple years in a row. Our lawyers have been recognized as "Super Lawyers" each year for a more than a decade, and as "Best Lawyer in America," and as "Leaders in the Law" among other peer reviewed awards.

In addition to our sixteen attorneys, we have paralegal and support staff, plus research capability from para-professionals that work for us from time to time. We strongly believe in working as a team with the local municipal administrators, clerks, treasurers, planners, building inspectors, assessors, engineers and financial consultants, etc.

The background on each attorney is as follows:

JOHN P. MACY

Born in Menomonee Falls, Wisconsin, June 26, 1955; admitted to Bar, State of Wisconsin 1980, U.S. District Courts, Eastern and Western Districts of Wisconsin, the United States Court of Appeals for the Armed Forces and United States Supreme Court.

EDUCATION

Carroll College (B.A., cum laude, 1977); Marquette University (J.D., 1980).

American Bar Association

THE FELLOWS of the American Bar Foundation

State Bar of Wisconsin

THE FELLOWS of the Wisconsin Law Foundation

Waukesha County Bar Association: Member 1980 to present.

Uniform Law Commission: Wisconsin Commissioner: 2012 to present.

Court Commissioner: Waukesha County.

H. STANLEY RIFFLE

Admitted to bar, State of Wisconsin 1980, U. S. District Courts, Eastern and Western Districts of Wisconsin; 2001, United States Court of Appeals - D.C. Circuit.

EDUCATION

Carroll College (B.A., 1977); Marquette University (J.D., 1980).

MEMBERSHIPS

American Bar Association: ABA General Practice Section: Budget Officer, Council Member 1993-1996; Member - Standing Committee on Gavel Awards; Member - Law Practice Management Section; Member - Litigation Section.

State Bar of Wisconsin: Member - Board of Governors (1999-2001). Member - Standing Committee on Ethics (1997-2003).

Waukesha County Bar Association: President 1995.

Waukesha D.A.R.E.: Board of Directors

Waukesha County Condemnation Commission: Commissioner, 1988 - present.

MUNICIPAL LAW & LITIGATION GROUP, S.C.

Court Commissioner: Waukesha County 1986 - present.

REMZY D. BITAR

Admitted to bar, State of Wisconsin 2001, State of Missouri, 2002, Eastern and Western District of Wisconsin, Seventh Circuit Court of Appeals, U.S. Supreme Court

EDUCATION

Washington University School of Law (J.D.) 2001
Lawrence University (B.A.) 1997

MEMBERSHIPS

American Bar Association, the Milwaukee Bar Association, the Wisconsin Defense Counsel, the Defense Research Institute and the Milwaukee Metropolitan Association of Commerce. In addition to his legal work, Remzy has co-chaired the Milwaukee Bar Association's Civil Litigation Section and served as President of the Milwaukee Insurance Adjuster's Association. Remzy also recently completed his tenure in the American Inns of Court, an organization of trial lawyers devoted to improving the skills, professionalism, civility and ethics of the bench and bar in our community. A frequent lecturer on topics including municipal, civil rights and constitutional law along with litigation related matters, Remzy has been honored on several occasions to appear in the Wisconsin Super Lawyers as a "Rising Star" and "Super Lawyer" and in the Milwaukee Magazine as a "Best Lawyer," as well as earning honors through Wisconsin Law Journal's "Leaders in the Law" and through his contributions in achieving a Tier 1 rating from US News and World Report – Best Lawyers in the area of Municipal Litigation.

PAUL E. ALEX

Admitted to bar, State of Wisconsin 1987; U.S. District Court, Eastern District of Wisconsin, 1987; U.S. District Court, Western District of Wisconsin, 1987; and United States Court of Appeals for the Seventh Circuit.

EDUCATION

University of Wisconsin-Milwaukee (B.B.A., 1981, M.B.A., 1983) Marquette University Law School (J.D., 1987).

MEMBERSHIPS

Waukesha County Bar Association: Municipal Law Section.

State Bar of Wisconsin: Administrative and Local Government Law Section.

Judicial Intern, Honorable Dale E. Ihlenfeldt, United States Bankruptcy Court for the Eastern District of Wisconsin.

Associate Attorney, de la Mora & de la Mora, 1987 - 2005; Assistant Village Attorney, Elm Grove, Butler, Lac La Belle, Hartland. Municipal Law & Litigation Group (2006 – present). Adjunct Faculty, Waukesha County Technical College, Constitutional Law and Criminal Law (2009 -2010). Board Secretary, Board of Directors, Heritage Christian Schools, Inc. (2009 - present). Lecturer on municipal law topics sponsored by the League of Wisconsin Municipalities, the Wisconsin Bar Association, the Waukesha County Bar Association, Municipal Law Section, and Waukesha County Technical College.

MUNICIPAL LAW & LITIGATION GROUP, S.C.

MATTEO REGINATO

Admitted to bar, State of Wisconsin 2013, Eastern and Western District of Wisconsin, Seventh Circuit Court of Appeals

EDUCATION

Marquette University Law School, J.D., magna cum laude
University of Houston, B.A., cum laude

Matteo has written and lectured on several legal topics relating to municipalities, including: municipal liability; discretionary immunity; government meetings; the First Amendment; law enforcement's use of force; law enforcement's contact with suicidal and mentally ill individuals; search and seizure practices; jail/prison medical care and conditions of confinement; and emergency responders. Matteo has been recognized by Super Lawyers Magazine as a Wisconsin Rising Star in the area of civil rights.

LUKE A. MARTELL

Admitted to bar, State of Wisconsin 2016, Eastern and Western District of Wisconsin, Seventh Circuit Court of Appeals, State of Colorado

EDUCATION

University of Wisconsin Whitewater (BBA) – 2009
Northern Illinois University College of Law (JD) – 2013

Luke began his legal career as an intern with the City of Brookfield while in law school. When he graduated he moved to Denver, CO where he worked in the healthcare industry practicing contract law.

Luke has since joined MLLG and moved back to his home state of Wisconsin. His practice now focuses on Municipal and Civil Rights Litigation Defense in both state and federal court. He also represents several municipalities as a prosecutor. Luke enjoys working with local governments and getting to know municipalities all across the state. His experience includes ordinance, land use, zoning and condemnation issues, along with municipal liability, Fourth Amendment claims and civil rights.

SAMANTHA R. SCHMID

Admitted to bar: State of Wisconsin 2014, Eastern and Western District of Wisconsin, Northern District of Illinois, Seventh Circuit Court of Appeals

EDUCATION

Marquette University Law School, J.D., cum laude
University of Wisconsin-Madison, B.A.

Samantha has written and lectured on several legal topics relating to municipalities, including: municipal liability; law enforcement use of force, search and seizure practice, the Fourteenth Amendment and substantive due process, the First Amendment, and employment law. Samantha has been recognized by Super Lawyers as a Wisconsin Rising Star in the area of civil litigation.

MUNICIPAL LAW & LITIGATION GROUP, S.C.

CHRISTOPHER R. SCHULTZ

Admitted to bar, State of Wisconsin 2009, Eastern and Western District of Wisconsin, Eastern and Western District Bankruptcy, Seventh Circuit Court of Appeals

EDUCATION

Marquette University School of Law (JD) – 2009
University of Wisconsin, Madison (BA) - 2003

Christopher began his legal career as an associate attorney at Michael F. Dubis, S.C., Waterford, WI where he was a municipal prosecutor and assistant town attorney for the Town of Waterford. He was responsible for all representation of Town of Waterford Sanitary District and Town of Lyons Sanitary District. He managed representation and litigation on behalf of bankruptcy trustee clients, represented debtors in Chapter 7 & 13 cases including preparation of schedules. He was responsible for managing litigation / legal affairs for Citizens Bank, a medium-sized community bank, including preparing and filing all bankruptcy and foreclosure pleadings / documents for Citizens as well as frequent appearances in Bankruptcy and Circuit Court.

Christopher joined Municipal Law & Litigation Group, S.C. as Lead Municipal Prosecutor in February 2019. Christopher handles municipal prosecutions for 19 of the firm's municipal clients; including initial appearances, pre-trials and trials in multiple municipal court venues, and appeals. Christopher works with court and municipal staff to manage files, gather evidence as needed and prosecute traffic and municipal ordinance violations.

STEVEN J. CENTINARIO, JR.

Admitted to bar: State of Wisconsin
Steven served as a Deputy District Attorney in the Waukesha County District Attorney's Office for more than 20 years. He joined MLLG part-time in 2017 to assist with municipal prosecution matters.

LUCAS C. LOGIC

Admitted to Bar, State of Wisconsin 2021
Admitted to Western District of Wisconsin
Admitted to Eastern District of Wisconsin

EDUCATION

Marquette University Law School, J.D.
University of Wisconsin, B.A. 2018

Lucas joined the firm in May 2021. In law school Lucas worked for the City Attorney for the City of Muskego, Wisconsin which sparked his interest in Municipal Law. This interest was furthered during his time as an intern for an electric utility company and he experienced municipal law from a different perspective. During his time in law school he served as the Comment Editor for the Marquette Intellectual Property Law Review and was also published in the 24th Edition of the Marquette Intellectual Property Law Review.

MUNICIPAL LAW & LITIGATION GROUP, S.C.

MICHAEL J. MORSE

Admitted to bar, State of Wisconsin 1981; Eastern and Western Districts of Wisconsin, Seventh Circuit Court of Appeals, U.S. Supreme Court

EDUCATION

University of Wisconsin-Madison (1978) Marquette University Law School (J.D., 1981).

MEMBERSHIPS

Waukesha County Bar Association: Municipal Law Section.

State Bar of Wisconsin: Administrative and Local Government Law Section (Past Chair), Board of Governors (Past Member), State Bar Finance Committee (Past Chair).

Mr. Morse began his practice with a law firm in Milwaukee, representing municipal governments and school districts as general counsel or on a special counsel basis. From 1999-2020 he was the full-time appointed Village Attorney for the Village of Menomonee Falls. During part of that time he also served as the Asst. Village Manager. He is also the former Town Attorney for the Town of Grafton. He is a member of the Waukesha County Condemnation Commission.

JAMES P. WALSH

Admitted to bar, State of Wisconsin 1985, Eastern and Western District of Wisconsin, Seventh Circuit Court of Appeals, United States Supreme Court

EDUCATION

Gonzaga University School of Law (J.D.) 1985
Marquette University (B.A.) 1978

James served as a City Attorney for the City of Appleton in Outagamie County from 2000-2020 and Assistant City Attorney and Deputy City Attorney for the City of Appleton from 1989-2000. He served as Assistant District Attorney in Richland County, Wisconsin from 1985-1989. He joined MLLG part-time in 2021 to assist with municipal matters.

BENJAMIN T. CROCKETT

Admitted to bar, State of Wisconsin May 2022

EDUCATION

Marquette University Law School, J.D.
University of Wisconsin-Madison, B.S. 2019

Ben started as a full-time attorney in June 2022 after clerking for the firm since February 2021. While in Law School Ben received the National Sports Law Institute's Sports Law Certificate; and he was a Member for the Marquette Sports Law Review. Ben is a municipal associate and focuses his practice on legal topics relating to municipalities.

MUNICIPAL LAW & LITIGATION GROUP, S.C.

GREGORY M. PROCOPIO

Admitted to Bar, State of Wisconsin 2022

EDUCATION

Marquette University Law School, J.D.,
Lawrence University, B.A. 2019, *cum laude*

Gregory started as a full-time attorney in June 2022. While in Law School, Gregory received the highest grade and CALI award for Federal Criminal Procedure; he participated in the Jenkins Honors Moot Court Competition; he will participate in the William B. Spong National Moot Court Competition in spring 2022; and he served as a member of the Marquette University Law School Moot Court Executive Board. Gregory joined our team as a litigation associate and focuses his practice on legal topics relating to municipalities.

ADAM J. MEYERS

Admitted to Bar, State of Wisconsin, 2020
Eastern and Western District of Wisconsin
Northern District of Illinois.

EDUCATION

University of Wisconsin-Madison, J.D. (Dean's List)
University of Wisconsin-Madison, B.A. (highest distinction)

During law school, Adam was involved with the Wisconsin Innocence Project in which he helped litigate a case to the 7th Circuit Court of Appeals and helped successfully overturn a homicide conviction in the Georgia Supreme Court. He also worked for the La Crosse County District Attorney's Office in which he had the opportunity to conduct jury trials involving felony drug convictions as a law student.

After practicing for several years in general litigation in Madison, Adam joined MLLG and practices in both state and federal court, representing Municipalities on issues ranging from land use to civil rights.

SAVANNA M. GAIN

Admitted to Bar, State of Wisconsin, 2024
Eastern and Western District of Wisconsin

EDUCATION

Marquette University Law School, J.D.,
University of Wisconsin-Madison, B.A.

Savanna started as a full-time attorney in June 2024. In law school, Savanna worked for the Village Attorneys Office for the Village of Menomonee Falls, Wisconsin which sparked her interest in Municipal Law. While in Law School, Savanna received the highest grade and CALI award for Water Law; she competed in the Jeffrey G. Miller National Environmental Law Moot Court Competition; and she served as a member of the Marquette University Law School Moot Court Board. Savanna joined our team as a litigation associate and focuses her practice on legal topics relating to municipalities.

**CITY OF BERLIN
COMMITTEE OF THE WHOLE MEETING
STAFF REPORT**

TO: Common Council
FROM: Jessi Balcom, City Administrator
AGENDA ITEM: Review of Proposal for Compensation Study
MEETING DATE: February 4, 2025

BACKGROUND

Interim Administrator Wessel requested quotes on behalf of the City from three firms in late 2024. The request was to complete an employee compensation study/plan.

Public Administration Associates LLC responded to the request. The request has been revised to reflect the actual number of positions to be included in the study, and is included in the meeting packet. The proposal also outlines additional services to get the city's job descriptions up to snuff if needed. Whether or not to utilize this portion of the proposal can be decided later, once the data is collected and the need for such services can be determined.

SUGGESTED MOTION

Motion to recommend to Common Council to approve the Proposal and Municipal Services Agreement submitted by Public Administration Associates LLC to complete a Wage and Compensation Study/Plan for the City of Berlin.

**Proposal for Wage
and Compensation Study/Plan for the
City of Berlin**



Prepared by
Public Administration Associates, LLC

January 2, 2025 (Revised January 24, 2025)



Public Administration Associates, LLC



Public Administration Associates, LLC

Re: Proposal for Wage and Compensation Study (City of Berlin Positions)

Interim City Administrator Diane Wessel
City of Berlin
108 N. Capron Street
Berlin, WI 54923

Dear Interim City Administrator Wessel:

On behalf of Public Administration Associates, LLC (PAA), I am pleased to submit the following proposal for the City of Berlin's consideration that addresses your desire for a wage and compensation study/plan to include 25 separate municipal positions (total of approximately 42 employees).

As you may be aware, PAA has specialized in working with smaller municipalities in Wisconsin on organizational audits/management reviews, executive recruitment, and human resource-related studies since its founding in 1998. We have a track record of success and we encourage you to contact any of the 200 plus Wisconsin cities, counties, villages and towns that we have served.

PAA would be extremely privileged and honored to work with the City of Berlin. We know that our PAA partners and associates who will work with the City on this project can provide significant value to your organization based on their extensive municipal experience and expertise.

Sincerely,

Kevin M. Brunner

Kevin M. Brunner
President

cc-David Tebo, PAA Associate

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 20 plus years of municipal consulting and a combined 300+ years of public management experience.

A New Generation of PAA Leadership

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 twelve 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 thirty-five 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 as 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.

I. Proposed Methodology and Scope of Work

PAA is aware that the City of Berlin has requested a proposal for the preparation of a Wage and Compensation Study that will evaluate current salaries and fringe benefits for 28 City positions. These positions are the following:

Administrator; Police Chief; Administrative Assistant-Police; Assistant Police Chief; Sewer & Water Superintendent; Administrative Assistant-Sewer & Water; Sewer and Water Operator; Street and Parks Superintendent; Street and Parks Laborer; Senior Center Programmer/Coordinator; Senior Center Programming Assistant; Senior Center Head Cook; Senior Center Transportation Driver; Deputy Clerk/Treasurer; Planning and Development Director; Economic Development Assistant; EMS Director; Assistant EMS Director; EMS Personnel Supervisor; Adult Librarian; Children's Librarian and Librarian Aid.

It is PAA's understanding that the Berlin Volunteer Fire Department and its employees will not be part of the scope of this study.

The purpose of the study is to ensure the City maintains a competitive standing in relation to other similar municipalities with a compensation system that is attractive, equitable and effective.

The general scope of work for the proposed study would consist generally of the steps listed below and can be fine-tuned and refined after meeting with City representatives at the initiation of the project:

A. Review and analyze relevant organizational values and concerns. Determine current organizational needs in relation to the possible updating of a wage and compensation system.

PAA takes very seriously the importance of understanding current organizational values, needs and concerns. PAA has found in its studies that each organization has a different set of values and concerns affecting the design of the classification and compensation system. Organizational information will be obtained through discussions with the Administrator, staff and Mayor and/or City Council members if needed. Other important historical background materials will be reviewed that may have a bearing on an updated wage comp study such as upcoming referendums, budgets, personnel policies, past plans, etc. After discussion with key staff to determine what issues might have arisen in the past, PAA will provide recommendations and options for ways the City could move forward.

B. Engage employees in the process through a written explanation of steps for the Wage/Comp Study and an Employee Job Questionnaire. Allow for individual input and communication with project consultants.

We are sensitive to the fact that classification and compensation plans require buy-in from employees. Important information for PAA's evaluation of internal equity between positions is gained through the Employee Job Questionnaire and conversations with employees.

C. Review and recommend revisions to position descriptions.

PAA will review each position description and verify with each employee that the position description accurately and completely describes the current work being done and the requirements for the position. We utilize a survey form conforming to established human

resource information standards to be completed by each employee. All discrepancies listed by employees are noted and any proposed changes will be documented for the City. It is expected that many of the position descriptions may need substantial updating and that cost is reflected in our proposal.

D. Rank all positions using a point factor approach to determine internal position evaluation.

The internal position evaluation consists of eight factors that are weighted: knowledge/education (20%), experience (20%), job complexity (20%), supervision exercised (10%), supervision received (10%), consequences of decisions (10%), interaction with other sets of people (5%), and work environment (5%). The internal evaluation is based upon a thorough review of position descriptions and responses to the Employee Job Questionnaire.

E. Establish an external peer group of 12-16 communities from which to obtain salary and benefit information for all designated positions.

PAA develops the market peer group of communities and comparability factors in consultation with the City. Factors typically compared include regional proximity, municipality size, organizational complexity, number of FTE's, equalized value and per capita spending. Where appropriate private market data are available, they will also be used. PAA will create a survey instrument for City approval that will capture the wage and benefit data they feel is most important to compare positions equitably across peer municipalities.

F. Develop a wage range midpoint for each benchmark position surveyed and optional wage ranges for consideration by the City at .8-1.20, .85-1.15 and .9-1.10 of midpoint.

One of the challenges confronting consultants in external compensation surveys is dealing with peer municipalities that have salary ranges and those having single point salaries without ranges. PAA uses a special methodology to capture both kinds of data enabling the calculation of what is termed the **external midpoint**. We then establish a **working range**, consisting, for example, of 80% to 120% of the external midpoint. This is a commonly used range for municipalities. The actual range that is used depends on decisions by the community. PAA will calculate several working ranges using different minimum to maximum spread.

G. Identify various pay plan options. Discuss with community leadership the issue of pay progression with appropriate consideration for both length of service and performance. Make recommendations based on the identified pay philosophy, feasibility and affordability.

We believe that the performance evaluation of every employee should be conducted by a municipality. However, we recognize that there are different perspectives on the relationship of performance evaluation and salary/wage adjustments. Systems range from what we describe as loosely linked evaluation to salary approaches to tight pay for performance approaches. If desired by the City we will offer options for how they might structure a compensation plan moving forward.

H. Design final pay ranges for the requested 28 positions that are consistent with the municipality's pay policy, internal equity scores and reflect appropriate pay and benefit compensation practices for employees at these levels.

- I. Prepare a written report for the City outlining the findings of the pay and benefit survey any recommendations for action;*
- J. Conduct compensation appeals following adoption of a new plan by the City. Appeals must be submitted within 30 days of plan adoption.*

II. Schedule for Comprehensive Wage/Compensation Analysis

Public Administration Associates, LLC can begin this project in January or February, 2025. Based on the time-sensitive nature of compiling the wage and compensation data and to coordinate with current PAA project workload we recommend a two- phase approach.

Phase 1: (Estimated Completion Date-April 1)

Late January-April 1: Meet with City Administrator (and other appropriate City officials) to prepare information about potential peer communities, establish criteria for comparisons, prepare wage and benefit surveys for approval, send out to peer communities and follow up to ensure adequate participation and accurate comparable. Collect and input data. Compute wage medians and prepare potential wage ranges for City review. Prepare comparative employee benefits summaries based on peer community benefits information received.

Phase 2: (Estimated Completion Date-June 15)

April 1-June 15: Meet with employees to discuss the purpose of a wage/comp study and review job questionnaires. Receive job questionnaires from employees. Employee interviews where necessary. Create job descriptions if requested and included in the scope of our work. Review data with City Administrator and get agreement on approach for final study presentation. Finalize data, write report and prepare for study presentation to Mayor, City Council, City Administrator and affected City Staff. Make presentation to Mayor and City Council at a Council Committee or full City Council meeting.

III. Employee Involvement

PAA may request information from Berlin as we research background materials and historical documents related to the Classification/Comp Study. We will need employees to prepare a job description questionnaire and to participate in requested information sessions. Department heads may be involved in reviewing position description information. All external data and all analysis of internal and external data will be the responsibility of the PAA consultants.

IV. Meetings and Presentations (In-Person or Zoom if Needed)

PAA will agree to work closely with the City Administrator and other City officials (including the applicable City Council committee) and keep them updated on study progress. There will be a minimum of three official visits (in-person or zoom) by our consultants to Berlin: (1) An initial visit which would include-Meeting with the City Administrator, and any other requested participants to formally initiate the Classification/Comp study project; (2) A second visit to include a meeting with all

employees to discuss the purpose of the study and review job questionnaires; 3) A third visit for a formal presentation to the Mayor, City Council, City Administrator and City Staff members once the plan is completed to answer any questions about final study recommendations.

V. Proposed Fee Structure for Services

Phase 1: (Estimated Completion Date-April 1)

Meet with the City Administrator (and appropriate City Council committee if desired) to prepare information about potential peer communities, establish criteria for comparisons, prepare wage and benefit surveys for approval, send out to peer communities and follow up to ensure adequate participation and accurate comparable municipalities. Collect and input data. Compute wage medians and prepare potential wage ranges for City review.

Estimated Cost for Phase 1 = 82 hours x Consultant Fees of Avg. \$105.00/hr. = \$8,610

Phase 2: (Estimated Completion Date-June 15)

Meet with employees to discuss the purpose of a wage/comp study and review job questionnaires. Receive job questionnaires from employees. Employee interviews where necessary. Review data with City Administrator and get agreement on approach for final study presentation. Finalize data, write report and prepare for study presentation to Mayor, City Council, City Administrator and City Staff.

Estimated Cost for Phase 2 = 60 hours x Consultant Fees of Avg. \$105.00/hr. = \$6,300

Total Not-to Exceed Cost for Complete Study and Compensation Step Plan (including travel/mileage) = \$14,910

Quote good until February 1, 2025

Please note that the above price quote does not include writing new position descriptions for those City positions which do not exist currently. **If the City would like PAA to develop those totally new job descriptions, it would charge \$350 per position description.** As mentioned in Section I above, PAA will have each current City of Berlin position holder complete an Employee Job Questionnaire and PAA will provide those documents to the City. City staff could certainly develop needed new position descriptions from those Employee Job Questionnaires as well as update those other position descriptions that are currently lacking. **If the City would desire to have PAA update all of its current job descriptions based upon the job questionnaires received as well as our own expertise and analysis, the cost would be \$200 per position description.**

If Berlin would like assistance in developing a performance review/professional development system that would be tied to the newly developed employee classification/compensation plan, PAA would provide a separate proposal for the City's consideration after further discussion with city officials. The cost of the development of an employee performance review/professional development system would be highly dependent on what the City's objectives would be for such a system and what software component of such a system would entail.

Relevant Experience

Public Administration Associates, LLC, specializes in organizational and administrative studies for smaller municipalities in Wisconsin as well as municipal executive recruitment and strategic planning.

Organization and Management Studies Performed by PAA for Wisconsin Municipalities (Last Five-Year Period)

- Classification/Compensation Study, Village of Union Grove, 2024
- Fire/EMS Consolidation Study, Town of Troy/Village of East Troy, 2024
- Municipal Governance Workshop, City of Burlington, 2024
- Fire/EMS Consolidation Study, Town of Linn/City of Lake Geneva, 2024
- Fire/EMS Staffing Study, City of Menomonie, 2024
- Fire/EMS Organizational Study, City of Ripon, 2024
- Classification/Compensation Study, Town of Freedom, 2024
- Fire/Organizational Study, Village of Fontana, 2024
- Fire/EMS Organizational Study, City of Waupun, 2024
- Organization/Governance Study, Village of Maple Bluff, 2024
- Organizational Audit/Staffing Study, Town of Rome, 2024
- Railroad ROW Study, Village of Germantown, 2024
- Classification/Compensation Study, Village of Campbellsport, 2023
- Classification/Compensation Study, Village of Weston, 2023
- Classification/Compensation Study, Village of Dane, 2023
- Fire/Organizational Study, Village of Williams Bay, 2023
- Wage/Compensation Study, Village of Belleville, 2023
- Fire/EMS Organizational Study, City of Lake Geneva, 2023
- Fire/EMS Organizational Study, Town of Linn, 2023
- Classification/Compensation Study, Village of Shorewood Hills, 2022
- Classification/Compensation Study, Walworth County Metropolitan Sewerage District 2022/

Update 2024

- Fire/EMS Organizational Study, City of Park Falls, 2021
- Fire Department Organizational Study, Village and Town of Cottage Grove, 2021
- EMS Operational Study, Deer Grove EMS District, 2021
- DPW Organizational/Staffing Study, City of Columbus, 2021
- DPW Organizational and Planning Study, Village of Kronenwetter, 2021
- DPW Organizational Analysis; Village of Waunakee, 2020-21
- Organizational Study, Town of Little Suamico, 2021
- Organizational Audit/Staffing Study, Village of Hortonville, 2020
- Classification/Compensation Study Update, City of Mauston, 2020
- Fire Department Organizational Study/Space Needs Analysis, City of Platteville, 2020
- County Administration Study, Sauk County, 2020
- Fire/EMS Organizational Study, Village of Little Chute, 2019-2020
- DPW Organizational Analysis/Staffing Study, Village of Germantown, 2020
- Classification/Compensation Study, City of Park Falls, 2020
- Organizational Audit/Staffing Study and Employee Personnel Policies, City of Park Falls, 2020
- City of Marinette Legal Services Study/Reorganization, 2020
- Organizational Audit/Staffing Study, Village of Port Edwards, 2020
- Organizational Audit/Staffing Study and Employee Personnel Policies, Village of Merton, 2019
- Organizational Audit/Staffing Study, Town of Osceola, 2019
- Organizational Audit/Feasibility Study for Creation of City Administrator Position, City of Mineral Point, 2019
- Streetlighting Fee Feasibility Study, City of Oak Creek, 2019
- Classification/Compensation Study, City of Sturgeon Bay, 2019
- Organizational Audit/Feasibility Study for Creation of City Administrator Position, City of Park Falls, 2019
- Organizational Audit and Classification Study, Town and Village of Somers, 2019
- Lodi Fire/EMS District Organization and New Station Location Study, 2019
- Employee Personnel Manual Development, Village of Williams Bay, 2019
- Community Collaboration Planning Project-Cities of Marinette and Menominee, MI, 2019

References from Recent Comparable Municipal Consulting Projects

Justin Carlson, Administrator, Town of Freedom, 920-788-4548, Wage and Compensation Study, Completed May 2024

Jami Gebert, Administrator, Village of Weston, 715-359-6114 (Ext. 2610), Wage and Compensation Study, Completed October, 2023

Teresa Hughey Groves, Clerk-Treasurer, Village of Dane, 608-849-5422, Wage and Compensation Study, Completed September, 2023

John Imes, President, Village of Shorewood Hills, 608-800-9920, Wage and Compensation Study, Completed June 2022

Neal Kolb, Administrator, Walworth County Metropolitan Sewerage District, 262-728-4140, Wage and Compensation Study, Completed, July 2022/Update April, 2024

Charlie Kudy, Administrator, Village of Campbellsport, 920-533-8321, Wage and Compensation Study, Completed September, 2023

Connor LaPointe, Administrator, Village of Union Grove, 262-878-1818, Classification/Compensation Study/Plan; Completed November, 2024

Josh Van Lieshout, Administrator, City of Sturgeon Bay, 920-746-2900 (O) Wage and Compensation Study, Completed December 2019/2021 Update

Qualifications of PAA Consulting Team for City of Berlin Classification/Compensation Plan

PAA will assign an interdisciplinary team to work with the Village on this consulting assignment. Kevin Brunner will serve as Project Manager and Dave Tebo will be the principal consultant (Project Lead).

Project Manager



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. Brunner has worked on over 25 local government classification/compensation projects for PAA.

Principal Consultant



Dave Tebo – Associate

Dave Tebo served as a Municipal Administrator in Wisconsin for over 30 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. He has completed approximately 20 classification/compensation projects with PAA.

Understanding

Public Administration Associates, LLC will commit whatever time and effort is necessary to fully and successfully complete all tasks described in this proposal for the specified costs. PAA will invoice 50% of total at contract acceptance and again at 100% of project completion (presentation and acceptance of the Berlin Classification/Compensation Plan by the Berlin City Council).

**If PAA believes a specific task requested by the City is beyond the agreed upon scope of work it will negotiate any potential extra charges with the municipality.

Approval:

Offered by: Kevin M. Brunner 1/24/2025
Public Administration Associates, LLC Date

Accepted by: _____
City of Berlin Date

MUNICIPAL SERVICES AGREEMENT

This Services Agreement is entered into as of this ____th day of February, 2025 by and between PUBLIC ADMINISTRATION ASSOCIATES, LLC, "PAA", and the CITY OF BERLIN, "CITY".

Whereas, City needs assistance with the study and analysis of its staffing classification and compensation plan; and

Whereas, PAA has expertise in preparing municipal classification and compensation plans;

Therefore, the parties agree as follows:

1. **Services.** At City's request, PAA will provide those services listed in Exhibit A to City (Updated PAA Proposal to City, dated January 24, 2025).
2. **Term.** PAA anticipates that this municipal study will take between 12 and 16 weeks.
3. **Payment.** For these services, City will pay PAA a not to exceed amount of Fourteen Thousand Nine Hundred Ten Dollars (\$14,910) as quoted in Exhibit A. PAA will submit an initial invoice for one-third (\$4,970) of the quoted cost upon the execution of this agreement and subsequent invoices for one-third (\$4,970) at 65% and 100% of project completion to the City, which will remit payment within 30 days of invoicing.

A. If City terminates this contract prior to the conclusion of services by PAA, City will immediately pay PAA for all services rendered to City.

B. PAA may terminate this agreement at any time if City has not made payment within 30 days of invoicing.

C. In the event that additional consulting work for preparation of employee job descriptions is desired by City, City agrees to pay the quoted cost per job description as contained in Exhibit A.

4. **Professional Conduct.** PAA will provide the services to City in a professional and business-like manner, and will

act in accordance with all Federal, State, and local laws, regulations, rules and ordinances. PAA will at all times endeavor to uphold and preserve the reputation of the City.

5. **Cooperation & Conduct.** Similarly, City and its representatives will act and communicate at all times in a professional manner, will provide its full cooperation to PAA in PAA's study on behalf of City, will provide PAA with accurate data and information as requested by PAA for the study, and will comply with all Federal, State, and local laws, regulations, rules and ordinances.
6. **Accurate Information.** City will endeavor to provide PAA with accurate information and data so that PAA may prepare meaningful studies to City.
7. **Liability Insurance.** PAA carries professional liability insurance with limits of \$1,000,000 per occurrence/\$1,000,000 aggregate.
8. **Hold Harmless & Indemnity.** City agrees to hold harmless, indemnify, and defend PAA from any and all demands, claims, causes of action, and judgments brought by candidates or third parties against PAA and/or City for City's negligent or intentional conduct resulting in damages to a third party.

Similarly, PAA agrees to hold harmless, indemnify, and defend City from any and all demands, claims, causes of action, and judgments brought by candidates or third parties against PAA and/or City for PAA's negligent or intentional conduct resulting in damages to a third party.
9. **Authorized Signatory.** The person signing this contract on behalf of each party warrants and represents that she/he/they have the authority to do so.
10. **No Assignment.** Neither party may assign this contract without the written consent of the other party.
11. **Entire Agreement.** This contract contains the entire agreement between the parties, and supersedes all prior discussions and negotiations between them. This contract may only be amended by a written contract signed by both parties.

12. **Disclosure of Attorney.** PAA discloses to City that one of PAA's members is an attorney; however, PAA will not provide City with legal advice. City must seek legal advice from its own counsel.
13. **Governing Law.** This agreement is governed by the laws of the State of Wisconsin.
14. **Public Records Law.** Each party herein shall reasonably cooperate with the other parties herein to facilitate compliance with the Wisconsin Public Records Law, sec. 19.21, et seq., Wis. Stats., and upon request by any other party, provide to the requesting party all documents in their possession or control which are subject to release under such law.
15. **No Partnership.** Nothing in this Agreement shall be construed to create any co-partnership, principal and agent, joint venture or other similar relationship between the parties hereto and no party may incur debts or liabilities in the name, or on behalf, of any other party unless expressly approved by the party to be bound thereby in a written instrument signed by such party.
16. **Nonwaiver of Governmental Immunity.** Notwithstanding any provision to the contrary contained herein, no provision of this Agreement shall be construed as a waiver of any immunity or limitation of liability granted to or conferred upon any party by applicable provisions of Wisconsin law.

Dated this ___th day of February, 2025.

PUBLIC ADMINISTRATION ASSOCIATES CITY OF BERLIN

By *Kevin M. Brunner*
KEVIN M. BRUNNER, President
Public Administration Assoc.
1155 W South Street
Whitewater, WI 53190
kevin.brunner1013@gmail.com

By _____

MEMO

TO: Common Council- Committee of the Whole
FROM: Timothy Ludolph, Zoning Administrator
RE: Update Regarding Comprehensive Plan - Request for Proposal
DATE: February 4th 2025

Background:

The Plan Commission previously recommended to the Common Council an RFP (Request for Proposal) be posted to recruit a firm to rewrite the Comprehensive Plan. Initial feedback from a firm, that was in the process of responding to the RFP, indicated that a proposal meeting the scope identified in the RFP would likely significantly exceed the budget. As a result, staff had withdrawn this document from publication and is exploring alternative options.

This information was taken to the Plan Commission where they discussed the options presented by staff, a background of these processes, and the actions necessary to revise the RFP (or a possible alternative RFQ) for the rewrite of the Comprehensive Plan. The Commission believes staff can make the appropriate decisions regarding choosing the changes needed to refine the existing document to bring back by the February meeting. Once the Plan Commission approves changes this can go before the Common Council and have the process essentially repeated as it had been executed before.

Discussion:

This memo is intended to provide an update to the Common Council, particularly for those who are preparing to engage in the evaluation of an RFP in the near future. Staff will present further updates as a new document is developed, ensuring communication continues while a replacement RFP is issued. We believe the new RFP will successfully attract a firm capable of operating within the established subject matter and budget constraints.

**CITY OF BERLIN
COMMITTEE OF THE WHOLE MEETING
STAFF REPORT**

TO: Common Council
FROM: Jessi Balcom, City Administrator
AGENDA ITEM: Review of Proposal for Strategic Plan Development
MEETING DATE: February 4, 2025

BACKGROUND

The Interim City Administrator requested quotes for Strategic Plan development services in late 2024. Two proposals were received, one from CP2 Consulting and one from Allyson Brunette Consulting. The proposals are in the agenda packet for your review and were also provided in the January Committee of the Whole packet.

The Council may discuss the merits of each proposal and determine if they would like to recommend one of them to the Common Council for approval on February 11. If the Council feels additional information is needed and would like to invite the proposers in for an interview in order to take a deeper dive into the proposed methods and experience of the two firms before determining which consultant to move forward with, that could certainly be arranged.

City of Berlin

**Proposal for Comprehensive
Strategic Plan Services**



December 2024

Prepared by: CP2 Consulting



Strategic Plan Proposal for Berlin, WI

December 26, 2024

Diane Wessel
City of Berlin, WI

RE: Comprehensive Strategic Plan Proposal

Dear Diane Wessel,

CP2 Consulting is pleased to submit our proposal to assist the City with Strategic Planning services. The following approach/framework specifically addresses the organization's desired outcomes as we understand them. The following proposal outlines how CP2 Consulting can address the following needs:

- Conduct internal and external stakeholder engagement activities via varied methods such as focus groups, online surveys, and interviews;
- Facilitate the development of the organization's mission, vision, and values to set organizational priorities and the City's overall strategic direction;
- Facilitate a strategic Plan workshop, including SWOT analysis, with the City's elected officials and senior leadership to develop short-term and long-term organizational goals that can be monitored;
- Facilitate a governance session;
- Provide a final summary report of the strategic plan process and outcomes.

As the attached proposal reflects, we have considerable experience facilitating strategic planning and implementation processes like the one envisioned for City of Berlin. CP2 Consulting specializes in serving public sector clients. I will be the one of two consultants for this project, and my career has been focused on roles either in local government or nonprofits, including as the former Executive Director of the Wisconsin City County Management Association. My Master of Public Administration (MPA) degree includes a specialization in public leadership and strategic management, and I hold a certification in Strategic Planning endorsed by George Washington University and the Baldrige Foundation. Winnie Frankel, who will also be working on this project, has a Master of Social Work (MSW) degree, a Clinical License (LCSW,) as well as a bachelor's degree in organizational communication and political science. Her career has focused on facilitating understanding and organizational consensus in public, professional, and academic settings. The CP2 Consulting team has a long-standing commitment to strategic thinking, cultivating leadership, transparent practices, and measurable results.

Thank you for the opportunity to provide these services to the City of Berlin.

Sincerely,



Cory Poris Plasch, President/CEO
CP2 Consulting, Inc.

Project Approach

Strategic planning, at its core, is establishing a clear direction forward for the organization in alignment with its mission and core values.

The CP2 Consulting strategic planning methodology is based upon leading practices in strategic planning, refined and continually updated based upon industry trends and knowledge gained through client engagements. Organizational culture is a key component in meeting strategic goals, and we employ and promote strategies to create a Learning Culture, where growth, curiosity and authenticity prevail. Our methodology is comprehensive and thorough, while remaining flexible enough to meet the specific needs of our clients.

In the following proposal, CP2 Consulting recommends a multi-phased, participative format to engage City leadership and staff to shape the desired future direction of the City.

Phase 1: Strategic Plan Development

Phase 1A: Project Launch

This phase involves project start-up activities, including:

1. Project review meetings with key City project staff to confirm the scope of work and expected outcomes;
2. Provide an overview of the strategic plan process;
3. Review history and current fit of mission, vision and values of the organization and determine the extent of needed adjustments;
4. Identify and confirm stakeholder involvement and the overall environmental scanning process elements; and,
5. Discuss current organizational culture.

The purpose of this phase is to confirm the overall project scope and intended outcomes and make any necessary refinement to the project Plan and budget.

Phase 1B: Stakeholder Engagement

Stakeholder engagement is a key component of the strategic planning effort as it allows you to understand your organization from a variety of perspectives.

- Internal stakeholders – refers to individuals or groups who are within the organization by virtue of being elected to or employed/appointed by the organization, including employees at all levels. Internal stakeholders are essential to successful implementation of the strategic plan and their input should be considered and incorporated into the strategic planning process.
- External stakeholders – refers to individuals or groups who are outside the organization but are impacted by the actions of the organization and the quality of life in the community. These include, but are not limited to, businesses, neighborhoods, residents of all ages, historically underrepresented populations, special interest groups, and other taxing jurisdictions.

There are two avenues proposed for collecting original stakeholder feedback specific to this project, including:

- Online survey of stakeholders. These surveys can be targeted to internal or external stakeholder groups, a subsection of internal or external stakeholder groups, and/or the entire community. A

semi-custom survey is developed collaboratively between the Administrator and/or other key staff and the consultant. The survey is administered by the consultant and the raw data is owned by the consultant but upon request will be anonymized and shared with the client. *For this project, a community survey is recommended.*

- **Invitational Focus groups.** These groups are facilitated by the consulting team with groups identified and invited by the client. The sessions run approximately 90 minutes and consist of ten to 12 individuals from each of the selected stakeholder groups. Groups can be either internal or external stakeholders. While some information may be gathered during the Comprehensive Plan data collection process, it is often helpful to have a more thorough understanding of internal operations and strategic opportunities for the organization through dedicated employee focus groups. Additionally, direct stakeholder engagement helps to build buy-in for the strategic Plan process, an important consideration for successful implementation. *For this project, three focus groups are recommended, one consisting of city staff, one of residents, and a third to be determined at a later time.*

Both proposed stakeholder engagement activities include:

1. Discussion and finalization of methods to be used (e.g., focus groups – number and types, etc.).
2. Facilitation of the process with selected approaches.
3. Summarization and presentation of results derived from the raw data.

It is the responsibility of the City to secure any facilities or meeting rooms as well as coordinate invites needed for stakeholder engagement. The City will coordinate with CP2 Consulting for room arrangements/set-up, participant list, and refreshments for all workshops and project sessions. The City should check with its legal counsel to make sure all meeting postings are consistent with any open meetings act procedures. The City is responsible for reviewing and securing facilities including technology or equipment, supplies and/or other ancillary logistical items, as well as refreshments and any associated costs.

Phase 1C: Understanding the Operating Environment

The introductory step in the strategic planning process is to understand the operating environment. In addition to the stakeholder data in Phase 1B above, this is accomplished in the following four ways: (1) an Environmental Scan; (2) an Organizational Profile; (3) interviews with members of the elected board; and (4) a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis.

- **Conduct Environmental Scan**

An environmental scan is a thoughtful analysis and evaluation of the strategic environment facing the organization. Environmental factors affecting the organization's operative environment should be reviewed, including financial and economic conditions, demographics, political and intergovernmental relations, citizen and stakeholder issues, technology changes, environmental sustainability, and the regulatory environment. This will be generated by the staff with guidance from the consultant.

- **Develop Organizational Profile**

An organizational profile is a snapshot of your organization, the key influences on how it operates and the key challenges it faces. Information regarding organizational structure, work processes, staff capacity and capabilities, and the strategic environment are included. Employee focus group data can help inform the organizational profile along with employee surveys and other internal documents. This will be generated by the staff with guidance from the consultant.

➤ Interviews

Interviews with members of the elected board will be conducted to introduce the consultant(s) and acquire the perspective of the elected leadership regarding the current environment, challenges, and issues.

➤ SWOT Analysis

A SWOT questionnaire is administered in advance of the strategic planning retreat to all strategic planning participants. This provides a leadership perspective on the current internal and external environments. The SWOT is administered by the consultant to ensure anonymity; candor by participants is encouraged to uncover and understand strategic issues. The data generated is used at the strategic planning sessions.

Phase 1D: Strategic Plan Workshops

Governance Session

This session includes the governing Board and staff leadership team and is focused on establishing a collective, working understanding of rules, roles and norms for individuals and the group. The consultants will review opportunities to enhance responsible and effective team interaction by increasing awareness of successful group communication dynamics. The session will enhance responsible and effective team interaction by increasing awareness of successful group communication dynamics.

Strategic Planning Session #1 – Review Stakeholder Feedback, Environmental Scan, and Organizational Profile

This session includes the governing Board and leadership team and is dedicated to reviewing the results of the internal and external stakeholder feedback, the environmental scan, and the organizational profile. The consultants will present focus group and survey results (if applicable); the staff will present the organizational profile and environmental scan. The session concludes with a facilitated discussion amongst the governing Board regarding issues raised. (This session is typically one hour or less in length and can be combined with a regularly scheduled Board meeting or work session)

Strategic Planning Session #2 – Facilitate Strategic Discussion, Mission, and Vision Review, and Strategic Goal Development

This session includes the governing Board and leadership team and focuses on reviewing or confirming organizational purpose, examining the operating environment, and establishing strategic goals. The impact of organizational culture will be discussed via a facilitated conversation. The current mission, vision, and values will be reviewed and updated as appropriate. A facilitated process is held to generate a list of organizational challenges and a resulting set of strategic goals. The group's effort will be informed by the results of the information generated by the scan, profile, and results of the SWOT questionnaire. (This session is typically 3-4 hours and is the morning session of a one-day retreat, combined with Session #3)

Strategic Planning Session #3 – Establish Outcomes, Key Indicators, Targets

This session includes the government Board and leadership team and is dedicated to defining a set of outcomes, key performance indicators, and targets to measure progress towards the strategic goals established in Session #2. Measures are established with the priority of establishing clear alignment between all measures, resulting in buy-in through all levels of the organization. (This session is typically 3-4 hours and is the afternoon session of a one-day retreat, combined with Session #2)

Phase 2: Implementation Strategy and Plan

Achieving strategic goals can be a daunting challenge unless deadlines and accountability measures are put into place. CP2 Consulting will work to develop an implementation strategy that clearly demonstrates how employees throughout the organization play a role in breathing life into the strategic goals and overall strategic plan that is intended to guide the community forward over the next 3-5 years.

CP2 Consulting will work with the City to assemble an Implementation Team, representing staff from multiple levels and job functions throughout the organization. The Implementation Plan development process aligns efforts to ensure that every department works together in a complementary fashion as they achieve measurable progress towards common goals. We will discuss resources for tracking progress using systems ranging from spreadsheets to software, depending on your organizational preference.

Strategic Plan Implementation Session—Develop Strategic Initiatives

This session is conducted with the Implementation Team and focuses on cascading the strategic plan throughout the organization through the development of initiatives. Project plans will be introduced as a method to define milestones that measure progress on initiatives, providing accountability. Options to manage the Strategic Plan progress, including internal tracking or using external software, will be determined with the leadership team. A Strategic Plan Final Report that includes an Executive Summary will be submitted once initiatives are established. (This session is generally 3 hours)

Company Information

Firm Overview

CP2 Consulting is a woman-owned strategic planning and organizational development company that works with local governments to create and implement strategic plans that achieve measurable outcomes. Our company provides data-based solutions that enable organizations to actively engage stakeholders, define future outcomes with significant impact and implement result-oriented strategies to meet those goals. We incorporate leading performance management practices to help our clients measure and analyze performance data and implement strategies to achieve results with considerable impact.

CP2 Consulting was founded in 2021 by Cory Poris Plasch, an experienced local government and 501(c)3 nonprofit leader passionate about helping the public sector and nonprofits achieve significant impact and results. Since 2015 she has worked with municipalities in numerous states, assisting them in stakeholder engagement, developing measurable and impactful strategic plans, and designing implementation plans that inspire the entire organization. CP2 Consulting works primarily with clients in Wisconsin, Illinois, Tennessee, and Iowa. Current Wisconsin clients include Burlington, Mukwonago, Shorewood Hills, Appleton, and Franklin.

Project Members

Cory Poris Plasch, MPA, President/CEO of CP2 Consulting. Cory has served in variety of leadership positions in the public and private sector including Executive Director of the Wisconsin City/County Management Association, Membership Director for the Alliance for Innovation, and most recently as Vice President of Strategic Development at POLCO. Her local government experience ranges from 911 Dispatcher to the City Manager's Office in several communities. She speaks across the country on topics including the use of data, implementation of strategic plans, engaging hard-to-reach populations, and innovation in local government. She has a master's degree in public administration from Northern Illinois University and a certification in strategic planning from George Washington University. She has been assisting local governments with stakeholder engagement, developing performance measures, and establishing a learning culture since 2015.

Cory can be reached at:

Office: 262-362-8841

Cell: 630-476-0763

Email: cory@cp2-consulting.com

Wilyna (Winnie) Frankel, LCSW, Senior Manager, Training and Stakeholder Engagement. With over 20 years of professional experience in leadership and communication, Winnie is an adept facilitator. She has extensive experience working as a liaison between residents, elected officials, and city staff. She specializes in the collaborative process necessary to engage stakeholders in meaningful and productive discussions. She has a bachelor's degree in organizational communication and political science, and a master's degree in social work. Over the last ten years, Winnie has worked in a variety of settings including as a school social worker and coordinating public relations for a State Representative and has served on the Strategic Planning Advisory Committee for the City of Geneva, IL since 2018, most recently as Committee Chair.

References

CP2 Consulting has worked with numerous clients on strategic plans, and strategic plan implementation. References include:

Matt Harline, Village Manager, Villa Park, IL
E-mail: mharline@invillapark.com Phone: 630-592-6052 (O)

Villa Park, IL had struggled with lack of specific performance indicators and clear outcomes in past strategic plans, impacting their ability to implement their plan successfully. The plan is already producing tangible results, informing decisions about the upcoming budget and helping the Village understand what data they need to better understand in order to meet strategic plan goals. (case study and adopted strategic plan attached)

Anna Christopherson, Assistant City Manager, Whitefish Bay, WI
E-mail: A.Christopherson@wfbvillage.gov Phone: 414-962-6690 (O)

Whitefish Bay, WI was new to the strategic planning process, but with a highly educated community that desired better understanding of their local government, they enlisted CP2 Consulting to draft their first plan. Despite their Village Manager leaving during the stakeholder engagement portion of the process, the strategic plan continued, providing a road map of priorities for the community into the future. (adopted strategic plan attached)

Phil Kiraly, Village Manager, Glencoe, IL
E-mail: pkiraly@villageofglencoe.org Phone: 847-461-1101 (O)

Glencoe, IL is a high-performing local government that adopted an ambitious strategic plan in FY 2019. With their team over-extended, they desired a right-sized strategic plan with a clear implementation strategy to ensure successful accomplishment of the Village's long-term goals. (case study and draft strategic plan attached. Strategic plan has been reviewed by the Board and is anticipated to be adopted at the November 21st meeting)

Brian Mooney, Village Administrator, Shorewood Hills, WI
Email: BMooney@shorewood-hills.org; Phone: 608-267-2680 (O)

Shorewood Hills, WI was new to the strategic planning process and with a brand-new administrator, the timing was right to develop a unified vision for the Village, to provide guidance now and into the future. Cory worked with the board and staff to establish strategic direction, leading to common goals and measurable targets that this small organization felt were achievable but would also make a significant impact. (Strategic plan report is anticipated to be adopted at the January 2025 Board meeting).

Schedule

The strategic planning meeting activities and workshops will be held on dates that are mutually convenient for both the City’s participants and CP2 Consulting. The completion date will be dependent on the timing and sequence of the various planning components and leadership workshops. The following is a sample timeline for the recommended multi-phased approach:

Sample Project Plan

STEP	POTENTIAL DATES*	ACTIVITIES
Project Initiation	January 1st	Project planning, meeting(s) with key project staff
Development of Environmental Scan, Organizational Profile	January 1 st – February 3 rd	Review and analysis of data; draft Environmental Scan, Organizational Profile
Stakeholder Engagement	January 15 th	Focus Group and community survey preparation, execution and follow up
Data review, preparation	February 3 rd – 10 th	Synthesis of data; focus group and community survey reports; presentation preparation
Governance Session	February 5 th	Governance Session with elected officials and senior staff
Strategic Planning Session #1	February 14 th	Review Focus Group Feedback, Environmental Scan, Organizational Profile, Meeting preparation and follow up
SWOT Survey and Interviews	February 15 th - 24 th	SWOT survey, interviews with City Leadership Team
Strategic Plan Session #2- Executive Team Retreat	February 25 th	Meeting preparation, Strategic Plan session including review and updating of mission, vision, and values as appropriate, determine Goals
Strategic Plan Session #3	March 5 th	Meeting preparation, Strategic Plan session including Establish Outcomes, Key Indicators, Targets
Summary Report including Executive Summary	April 31 st	Professionally designed report submitted for client review

^Hours include all planning, preparation, execution, and follow-up from activities.

**Dates to be confirmed after initial project meeting between the City project staff and CP2 Consulting*

Budget

Breakdown of Costs

The fee for this project (including stakeholder engagement) is: \$12,500

Payments shall occur according to the following schedule:

1. Twenty-five percent (25%), upon execution of the agreement.
2. Twenty-five percent (25%) 60 days after the execution of the agreement
3. Twenty-five percent (25%) 90 days after the execution of the agreement
4. Twenty-five percent (25%) upon submittal of final report
5. Payments shall be made upon receipt of invoice

If this proposal is acceptable, please sign below and return one copy to Cory Poris Plasch at cory@cp2-consulting.com



December 26, 2024

Cory Poris Plasch

Date

Approval:

for Berlin, WI

Date

City of Berlin Strategic Planning Services Proposal

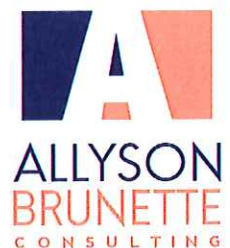


Photo from City of Berlin Facebook



Proposal Released:
December 31, 2024

Prepared for:
Ms. Diane Wessel, Interim City Administrator



December 31, 2024

Ms. Diane Wessel
Interim City Administrator
City of Berlin
108 N. Capron St.
Berlin, WI 54923



Delivered Electronically

Dear Ms. Wessel:

I am genuinely excited about the prospect of working with the City of Berlin and their new administrator to develop a municipal strategic plan. My company was established in 2021 and is rooted in my passion for empowering leaders. I am a former public servant and a champion for high-functioning public and independent sector organizations; my company works exclusively with the public and non-profit sectors.

PRINCIPAL CONTACT:

Allyson Brunette
Owner, Allyson Brunette Consulting, LLC
1644 Glen Road, Green Bay, WI 54313
920-371-9797
allyson@allysonbrunette.com

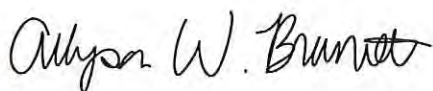
I have **extensive experience in municipal / county government** and community engagement, as well as in **individual and team leadership development**. I am not only committed to listening to your community and leaders to deliver a plan that is truly customized to your needs, but further, I am committed to empowering your leaders (as individuals and as a team) to implement this plan and help you to reach your goals effectively. A high-quality strategic plan can serve as a valuable mechanism for stakeholders to uplift one another, feel heard, reconnect with the purpose and meaning behind their work, and **gain a renewed appreciation for public service**.

What sets Allyson Brunette Consulting apart from other firms in this consulting landscape are the building blocks of my business:

- I serve **mission-driven clients only**, including non-profits and local governments.
- I am a **respected thought leader** and regular writer on topics of innovation in workplace culture and local governments.
- I provide my clients with **living deliverables and ongoing support** well after the ink is dry on their strategic plans. My implementation approach includes individual coaching for organizational leaders, robust strategies, toolkits, reporting mechanisms and a process to support your organization in revisiting your strategic plan on a monthly (or more frequent) basis, as well as post-plan check-in visits in the years following plan development.

The building blocks of my business help to bring strong synergy and a personal touch to my clients. Thank you for your consideration of my proposal - I hope to earn your business in the coming year.

Sincerely,

A handwritten signature in dark blue ink that reads 'Allyson W. Brunette'. The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Allyson Brunette, Founder/Owner
Allyson Brunette Consulting



COMPANY PROFILE

A. Background

After a decade spent working in the public and non-profit sectors, Allyson started her own company in 2021 with a focus on public and non-profit sector clients. In 2023, Allyson Brunette Consulting was certified by the State of Wisconsin as a Woman-Owned Business Enterprise.

B. Size

As a small business, Allyson is the only employee of the company, but we lean heavily on our network of subcontractors nationally and locally to bring local government expertise to our projects. Our subcontractors are either current local government employees or former public servants. Our small size allows us to be competitive on our pricing for municipal contracts. We believe in delivering a high-quality product and personal service at a fair price. We offer a level of radical pricing transparency into what the true cost of our products is that our competitors do not. *For the scope of work for a community the size of the City of Berlin, we do not anticipate use of subcontractors.*

C. Scope

Our core business areas are organizational development consulting; thought leadership writing; and individual and team leadership coaching. Allyson was formally trained in the Bryson Method of Strategic Planning in 2015 and has facilitated and developed more than 20 strategic plans for non-profit organizations, local government organizations (Towns, Villages, Cities, Counties, or departments within these organizations) over the past decade. Allyson developed her proprietary Civic Health Check™ product in 2022, which is a “skinny” strategic planning product for organizations that lack the capacity (financially or staff-wise) to implement full strategic planning efforts.

D. Differentiators

What sets our firm apart from competitors is our unique blend of strategic insight (as former public servants AND as experienced strategic planning practitioners) and personal relationship development. Allyson is a certified YouMap® coach and is invested in getting to understand the unique personalities, goals, and strengths of your leaders to customize a strategic plan that fits your community AND your leadership team which will be tasked with implementation.

We are mindful of the volume of work we take on annually, as well. We take on approximately 4-5 strategic plan clients annually and have no more than 3 in execution concurrently. This allows us to deliver a streamlined focus on our clients and to ensure that they never feel that they are just a number to us.



ASSIGNED CONSULTANTS

Our team consists of one facilitator and one graphic design professional who will support this project effort. Allyson Brunette is the primary facilitator who will be working day-to-day with the client and will be onsite for facilitation exercises. Sue will work fully remotely on project deliverables.

INTRODUCTION TO OUR TEAM

Allyson Watson Brunette
Founder/Owner, Allyson Brunette Consulting
www.allysonbrunette.com
Role: Project Lead



Education: MPA, Marist College School of Management; BA Economics and Political Science, Rider University.

Responsibility: Lead client contact (will meet at minimum bi-weekly with client by phone or video conference to manage project.) Will facilitate all workshops onsite and conduct stakeholder interviews. Will author strategic plan.

Areas of Focus: Communication + Strategic Insights + Project Management + Individual and Team Leadership Coaching

My Strengths:

My top strengths are **Strategic, Discipline, Communication, Belief and Responsibility.**

Fun Stuff:

I believe in getting to know the person you're hiring, so here are some fun things you should know about me:

1. I am locally* famous for my bacon, egg and cheese sandwiches.
2. I have a 6-year old retired racing greyhound named Paisley.

*Locally: within my household, but still very famous!

Sue Schinkten
Owner, Schinkten Design
Role: Graphic Designer



Education: BA in Advertising Design, University of Wisconsin-Eau Claire

Role: Will support project remotely. Responsible for final project deliverable design and layout.

Area of Focus: Graphic Design

Fun Stuff:

- In addition to running her own boutique graphic design firm, Sue teaches graphic design to students at the local technical college in Green Bay. A cool, once-in-a-lifetime experience for Sue was designing the logo for the Mulva Cultural Center, a new museum which opened in De Pere (her hometown) last year.



RECOMMENDED APPROACH

Phase 1: Pre-Planning and Information Gathering:

Our information gathering process is time-intensive, but it is critical to our effectiveness as facilitators. One of our organization's core values is to Listen Loudly. We pride ourselves on truly listening to what your elected officials, department heads, staff members, and community members have to say.


- **Review of existing research and documentation.** Our team will review your existing adopted documents at the department level or recent surveys / sentiment analysis completed.
- **Elected Official Engagement.** We recommend utilization of an online survey tool for City Council members be deployed very early in the process, the results of which will inform our one-on-one confidential interviews.
- **Employee Engagement.** We begin our information gathering process with confidential surveys deployed to organizational staff members at all levels within the organization. We use the information from these surveys to guide one-on-one confidential interviews with these individuals.
- **One-on-One Interviews with Department Heads & Elected Officials.** Your project scope includes confidential, one-on-one interviews (30-45 minutes per person), with up to 15 individuals of your choosing. We aim to speak directly with every elected official (Mayor / City Council) and department heads. This is time-intensive, but it is invaluable to ensure that we guide you in a meaningful direction in your strategic planning process.

Phase 2: Strategic Planning Facilitation:

Data gathered from survey feedback, focus groups, interviews, and community research, and previous City studies will feed into four components of our strategic planning process. Our in-person engagement will take place through three in-person on-site visits to Berlin.

- **Mission, Vision, and Values Workshop:** One (1) 1.5-hour workshop will be held with staff members, department heads, and elected officials. There is an option to split this into two workshops on the same day - one for team members and one for elected officials and department heads at no additional charge.
- **SWOT Analysis:** This report will be developed following the completion of information gathering through surveys, focus groups, and interviews. This report will be divided into external (community) issues and internal (operational) issues.
- **Strategic Planning Workshop #1 for department heads and City Council members:** A 2-hour workshop focused on external strategic issues.
- **Strategic Planning Workshop #2 for a cross-section of staff and department heads:** A 2-hour workshop focused on internal operational issues. These workshops would be held on a second onsite day in Berlin

Phase 3: Strategic Plan Development


- **Strategic Framework:** The meat of the strategic plan, the framework spells out in table form the following: Problem or challenge statement to be mitigated; Desired outcome(s) for said challenge by 2030.; Specific action step(s) to reach said outcome; Resources (costs, if monetary) needed to reach said outcome; Responsible parties for each action step; Timeline for completion of each action step and priority for each action step within the context of the plan as a whole; Additional consultant recommendations, where applicable. This framework is designed to be as easy and functional to implement as possible.
 - **Strategic Plan Narrative:** To supplement the framework, the strategic plan will include an accompanying narrative that outlines the process of reaching the framework. This will include a summary of the methodology used, data themes pulled from the data-gathering process, and a detailed summary of workshop and focus group themes. The strategic plan narrative will also include: an executive summary of the strategic outcomes the organization is aiming to accomplish within the plan time frame and a statement of mission, vision, and values.
- 



RECOMMENDED APPROACH

Phase 4: Implementation and Leadership Training

What sets our firm apart is that we don't stop our engagement upon plan delivery. We build personal relationships with your leaders and help to set them up for success in implementation with both individual and group coaching, rooted in Clifton Strengths.

- **Individual Leadership Coaching for Department Heads:** Our team will work with your department heads to conduct one-on-one leadership coaching. As a certified YouMap® facilitator, Allyson will work one-on-one with 8 department heads to complete a series of four assessments that help the individual to better understand their strengths, skills, values, and personality as it applies to their leadership role. This is approximately a 45-minute time commitment to complete the assessments for the individual and will be followed up with a one-hour virtual coaching session to review results with Allyson Brunette. This individual exercise helps participants to better understand their own leadership approach from a strengths-based perspective.
 - **Team Leadership Coaching and Plan Implementation Workshop:** Our final onsite workshop will bring together department heads to engage in a team building workshop that highlights and builds the strengths across the TEAM. By helping leaders to better understand how they work individually and as a team, this will set your organization up for more effective day-to-day operations and strategic plan implementation. Our workshop also includes a deep dive into best practices for implementing your strategic plan.
 - **Implementation Toolkit:** Even across a five-year time frame, organizational realities can change drastically. This is why our process empowers organizations to revisit - and when necessary, reframe - their strategic goals on a 90-day schedule that is not overly time-consuming. Our implementation process includes a toolkit which segments strategic goal implementation into the first year, and then further on a quarterly basis. Our implementation approach is based largely on the principles of EOS (Entrepreneurial Operating System), a strategic management approach used in the private sector. We believe in this system so much that we even provide our clients with copies of the training books for this approach at no cost so you can hit the ground running. We have adapted these tools for public and non-profit sector use. We provide to our clients the following tools and resources:
 - Two copies of Entrepreneurial Operating System books (for both managers and employees) to help kickstart your strategic plan implementation process.
 - Outlines for breaking down the Strategic Plan framework into quarterly and one-year strategic goal setting.
 - Outlines for breaking down the Strategic Plan framework into quarterly and one-year strategic goal setting.
 - Agendas for self-facilitated quarterly and annual strategic planning meetings and necessary worksheets for your teams to use. We also recommend that organizations add 1-2 one-hour meetings for strategic planning to their monthly schedule. Revisiting a strategic plan frequently is an often-missed step that ensures that staff and leadership stay on the same page for strategic goals, and that if unexpected changes occur, the organization and plan can pivot accordingly.
- 



RECOMMENDED APPROACH

Details on Proposed Workshops

MISSION, VISION, AND VALUES WORKSHOP: Up to two (2) 1.5-hour workshops for staff, department heads, and elected officials are an important kickoff milestone within the strategic planning project. These workshops bring all parties together to identify shared organizational values; frame a big-picture vision of where the organization aims to be in the future; and check in with your existing mission within the context of a five year plan.

STRATEGIC PLANNING WORKSHOPS: We will facilitate two 2-hour workshops with department heads and elected officials to Ideate, Discuss, and Solve around the External and Internal Operational issues. We frame these workshops around addressing Weaknesses and Threats specifically identified in the organizational SWOT analysis. Generally, two hours are sufficient for engagement with these audiences. If two hours are not sufficient, we are able to (as needed) provide follow-up sessions for administrative leadership.


IMPLEMENTATION AND STAFF TEAM BUILDING WORKSHOP: Our final 2.5-hour workshop with department heads will offer best practice insights on how to be highly effective in implementing your strategic plan as well as offering department heads the chance to better understand their strengths and individual leadership styles and how they mesh with those of their colleagues. This is an excellent way to build the capacity of your leadership team and to boost morale as you exit the strategic planning process.

TIMELINE

A proposed timeline is included which demonstrates the average time for the completion of a municipal strategic plan with our firm. This is, of course, adaptable to your preferred timelines should you want to wait for 2025 municipal elections to proceed with planning efforts. We anticipate an approximately 15-week timeline from start to finish, with the ability to adopt a final plan in mid-May with a February 2025 start date.

COMPENSATION AND RATES

A detailed line-item estimate is attached in this proposal. **Our project estimate for this project is \$14,994.00.** This is a not-to-exceed estimate, but actual costs will be billed should estimates come in below the projected rate. Our compensation rate is a maximum of \$180.00/hour.



REFERENCES

References below include a variety of some of our recent clients. Interested in seeing samples of our work? We got you! We have a link to sample work which we'll include with this proposal submission.

City of Fitchburg (WI) 2025-2029 Strategic Plan

(Currently in Common Council final review phase as of January 2025.)

Reference: Assistant City Administrator Adam Sayre,
adam.sayre@fitchburgwi.gov, 608-270-4209



Kalamazoo County (MI) 2025-2029 Strategic Plan

Adopted 10/2024

Reference: Kevin Catlin, County Administrator / Controller,
kacatl@kalcounty.com, 269-383-8843



City of Ludington (MI) 2025-2029 Strategic Plan

Adopted 9/2024

Reference: Kaitlyn Aldrich, City Manager, kaldrich@ci.ludington.mi.us,
231-845-6237



Oneida County (WI) Management Analysis

Presented 10/2023

Reference: Tina M. Smigielski, CPA, Oneida County Finance Director,
tsmigielsk@co.oneida.wi.us, 715-369-6145



Town of Ledgeview Strategic Plan(s)

Adopted 2022, 2018, 2015, and ongoing support of restructure of
Community Development Department (2023-2024)

Reference: Sarah Burdette, Town Administrator,
sburdette@ledgeview.wi.gov, 920-336-3360 *108





From **Allyson Brunette Consulting**
 1644 Glen Road
 Green Bay, WI 54313
 allyson@allysonbrunette.com
 EIN: 87-4759824

Estimate ID **1050**
 Issue Date **12/31/2024**
 Subject **City of Berlin Strategic Plan Estimate**

Estimate For **City of Berlin**
 108 N. Capron St.
 Berlin, WI 54923

Item Type	Description	Quantity	Unit Price	Amount
Service	One-time charge to add to Added the City as an added insured on Allyson Brunette Consulting LLC Commercial Liability Policy	1.00	\$100.00	\$100.00
Service	Phase 0 - Project Kickoff: Confirmation of dates, tool development, project planning.	2.00	\$180.00	\$360.00
Service	Phase 1 - Pre-Planning and Information Gathering: Launch of internal survey tools, one-on-one interviews with stakeholders, community focus group facilitation, survey analysis. Regular client check-in meetings bi-weekly through this phase.	20.00	\$180.00	\$3,600.00
Service	Phase 2 - Strategic Plan Facilitation: Mission Vision Values workshop(s) (1 or 2), SWOT analysis development, Strategic plan workshops (2), and post-workshop analysis. Regular client check-in meetings bi-weekly through this phase.	18.00	\$180.00	\$3,240.00
Service	Phase 3 - Strategic Plan Development: Hours of plan development and drafting, additional hours of client meetings for plan review and edits.	12.00	\$180.00	\$2,160.00
Service	Phase 4 - Implementation and Leadership Development: Individual YouMap profile development and debrief coaching for up to 15 department heads in the Village. Facilitation of one strategic plan implementation / team building workshop for department heads. This is a not-to-exceed cost based on 8 participating department heads, and cost will decrease if the Village opts to have fewer employees participate in this training.	1.00	\$2,000.00	\$2,000.00
Product	Travel costs: Mileage and travel time (billed at 40% of regular hourly rate) for three onsite visits to Berlin. This is based on the IRS 2025 rate of \$0.70/mile. Actual amount will be billed, this is a not to exceed number. (Mileage = \$294.00, Travel time = \$540.00)	1.00	\$834.00	\$834.00
Product	Facilitation supplies: Printing costs or workshop materials, supplies for Mission, Vision, Values; Strategic Planning and Implementation workshops. Actual amount will be billed, this is a not to exceed number.	1.00	\$200.00	\$200.00

Product	Graphic design and printing: Printing and professional graphic design of final strategic plan. Actual amount will be billed, this is a not to exceed number.	1.00	\$2,500.00	\$2,500.00
---------	---	------	------------	------------

Estimate Total \$14,994.00

Notes

Project deposit of 20% of maximum project cost is due as a client retainer upon acceptance of this estimate.
This estimate is valid for up to 90 days following issuance.