

TOWN OF NEW GLARUS
REGULAR TOWN BOARD MEETING
OCTOBER 11, 2023, 6:00 PM
AGENDA

NOTICE IS HEREBY GIVEN that Town of New Glarus board, County of Green, will conduct a meeting for the transaction of business as is by law required permitted at such meeting as follows:

LOCATION: 26 5th Avenue, Town Hall Community Room or virtually

VIRTUALLY: <https://us06web.zoom.us/j/81982537167?pwd=fYpCaBUBIfzuRhqxx0KjkJYFMjqoPE.1>

Meeting ID: 819 8253 7167

Passcode: 818308

Phone: 312 626 6799

Any specific subject on the agenda for consideration by the Board may be acted upon by the Board.

1. Call to Order
2. Confirm Proof of Posting
3. Approve Minutes Regular Town Board Meeting on September 13, 2023
4. Public Comments
5. 2024 New Glarus Fire District
 - a) Review of budget by Fire District Board Member John Ott
 - b) Discussion and possible action to approve
6. Set Date of Special Town Meeting with Approval of the Levy by the Electorate (November 8, 2023 at 6:00 PM)
7. Review and Approve Refund of Collected Impact Fees that Were not Spent or Committed Within Eight Years of Collection
8. Consider and Possibly Approve the Transfer of Impact Fees into General Fund for
 - a) Highway transportation facility
 - b) Town trails
 - c) Purchase of public land for Town Hall/Town Park
9. Update on 2023 Road Maintenance
10. Consider Recommendation from Town of New Glarus Park Commission to Approve a Limit on Hunting and Trapping at Town Park on State Highway 39 to be by Permit Only and to Permit Matt Stelter to Hunt within the Park this Season
11. Update on Request for Proposals for 2024-2026 Maintenance Assessment Contract
12. Review Health Insurance Options, with Possible Action
13. Patrolman Report
14. Clerk-Treasurer Report
 - a) Approval and payment of bills
 - b) 2024 budget preparations
15. Chairperson Report
 - a) Bulk Waste Pickup in Town, October 23, 2023
 - b) Discussion with possible action about reclassifying some Town roads as Class B roads
16. Parks Commission
 - a) September 20, 2023 minutes
 - b) Town e-Cycling event on Saturday, October 14, 2023
17. Plan Commission – September 21, 2023 minutes
18. Adjourn

Posted 10/06/2023

New Glarus Town Hall
New Glarus Maintenance Building
New Glarus Post Office
<https://townofnewglarus.com/>

Chris Narveson, Chair

John Wright, Clerk-Treasurer

Pursuant to applicable law, notice is hereby given that a quorum or a majority of the Town of New Glarus Planning Commission Members may attend this meeting. Information presented at this meeting may help form the rationale behind future actions that may be taken by the Town of New Glarus Board. Persons requiring additional services to participate in a public meeting may contact the Town Clerk for assistance at 527-2390.

P.O. Box 448 ~ 26 5th Avenue ~ New Glarus, WI 53574-0448 ~ Phone 608/527-2390

www.townofnewglarus.com

**REGULAR TOWN BOARD MEETING
WEDNESDAY, SEPTEMBER 13, 2023
MINUTES**

Town Board Attending: Chris Narveson (Chair), Jim Hoesly, Matt Streiff, and Troy Pauli

Board Members Absent: Robert Elkins

Also Attending:

1. **Call to Order** – Chair Narveson called the meeting to order at 6:02 PM.
2. **Confirm Proof of Posting** – Chair Narveson attested to the proper proof of posting.
3. **Approve Minutes**
 - a) August 9, 2023 Public Hearing (Pope)
Motion to approve the August 9, 2023 public hearing meeting minutes for the Shotliff property, as presented, was made by Supervisor Hoesly; seconded by Supervisor Pauli. Motion carried 4-0.
 - b) August 9, 2023 Public Hearing (Shotliff)
Motion to approve the August 9, 2023 public hearing meeting minutes for the Shotliff property, as presented, was made by Supervisor Pauli; seconded by Supervisor Hoesly. Motion carried 4-0.
 - c) August 9, 2023 Regular Town Board
Motion to approve the August 9, 2023 regular Town Board meeting minutes, as presented, was made by Supervisor Streiff; seconded by Supervisor Pauli. Motion carried 4-0.
4. **Public Comments** – None.
5. **Joint Town/Village Project Discussion** – Chair Narveson stated that the Village is not obligated to care for the Swiss Cemetery for five years after abandonment. There followed a brief discussion without action.
6. **Discuss Creation of ad hoc Committees to Possibly Include Building, Grounds, and/or Public Works** – A discussion was held about possibly seeking quotes from two to three contractors for a public works building. The Board members may visit other public works facilities recently constructed elsewhere. The land that is currently in production to the south of W6599 STH 39 may be seeded after harvest. The Town may work with Jacob Buol to seed the land for the winter season.
7. **Update on 2023 Road Maintenance** – Chair Narveson reported that Green County Highway has completed most of the road maintenance projects that were selected. There is some Dura Patch yet to be applied. The total cost will be kept below the approved budget for 2023.
8. **Discuss and Possibly Approve Operator License for Jason Neton** – Chair Narveson reported that Chief Sturdevant of the New Glarus Police Department recommended the approval of the license following his review.
A motion to approve an operator license for Jason Neton, was made by Supervisor Streiff; seconded by Supervisor Hoesly. Motion carried 4-0.
9. **Discuss and Possibly Approve Agreement with Green County Treasurer for Tax Collection Services** – Chair Narveson indicated that the proposed agreement is in tonight's packet.
A motion to approve the proposed agreement with the Green County Treasurer for tax collection services in 2024, was made by Supervisor Pauli; seconded by Supervisor Streiff. Motion carried 4-0
10. **Update on Request for Proposals for the 2024-2026 Maintenance Assessment Contract** – Clerk-Treasurer Wright contacted five vendors to solicit proposals on September 5, 2023. The deadline to respond is Monday, October 9, 2023. Without objection, consideration of the proposals will be added to the October agenda.
11. **Review Health Insurance Options, if Available, with Possible Action** – The Department of Employee Trust Funds will release the health insurance plans available in 2024 the week of September 11, 2023. No options were presented at this meeting to consider. This item, without objection, will be added to the October agenda.

- 12. Discussion with Possible Action to Appoint Rose Pertzborn as Park Commission Alternate** – Clerk-Treasurer Wright posted a notice of adoption on August 17th and published a summary of the ordinance to codify the Town Park Commission on August 24, 2023. The ordinance became effective on August 25th. Chair Narveson would like to appoint Rose Pertzborn to the position of Town of New Glarus Park Commission alternate for a term of seven years. She will be paid for attendance when another member is absent and she is present at the same rate as regular members. She will have the ability to vote on items contained on a duly posted agenda in the absence of another member when she is present.
- A motion to approve the appointment of Rose Pertzborn as an alternate to the Park Commission was made by Supervisor Pauli; seconded by Supervisor Hoesly. Motion carried 4-0.
- 13. Discussion Regarding Unreimbursed Planning Costs Associated with Roger Arn Property Potential as Requested by Joel Hedeman Prior to Sale** – Joel Hedeman or Brian Jeglum appeared before the Town Plan Commission on April 20, 2023 and May 18, 2023 to request a verdict regarding the remaining development potential for Roger Arn’s property along Durst Road that included the presentation of concept plans for possible future lot and access layouts. At the June 15, 2023 meeting, contract planner Tim Schleeper (in coordination with Clerk-Treasurer Wright), rendered an opinion of residential development potential based upon the Plat of Survey of land to be sold and the Certified Survey Maps of past development. The Town received and paid an invoice for services rendered by Vierbicher in the amount of \$510.00 that has not been billed to the prior or current owners. The Clerk-Treasurer wants to know if realtor Joel Hedeman should be invoiced for this paid bill. After discussion, the invoice for \$510.00 should be sent to the new property owner, without objection.
- 14. Patrolman Report** – Chair Narveson reported on a driveway application request on Farmers Grove Road. There was brief discussion without action.
- 15. Clerk-Treasurer Report**
- a) Approval and payment of bills – Chair Narveson noted that an ACH payment was made for the principal and interest owed on the 2022 loan to reconstruct Argue Road in the amount of \$24,122.78 that was not included on the printed report.
Motion to approve checks 21239 through 21257, deposits, and ACH transactions, including the loan payment of \$24,122.78, was made by Supervisor Streiff; seconded by Supervisor Pauli. Motion carried 4-0.
 - b) Submission of 2024 Recycling Grant – The Clerk-Treasurer filed this report online on August 24, 2023.
 - c) Updated population estimate – The current estimate from the WI Department of Administration for the Town of New Glarus is 1,415.
 - d) Election inspector training – Five Town election inspectors took six hours of training on Tuesday, September 12, 2023 in Albany. Six hours of training within a two-year period (2022-2023) are required for Chief Inspectors and the Town Clerk.
- 16. Chairman Report Including Discussion of Possible Participation in Water Testing Program** – The topic was discussed without leading to an action.
- 17. Parks Commission**
- a) August 16, 2023 minutes – The minutes were reviewed by those Board members in attendance.
 - b) Update on transfer of grant awarded by the Recreational Trails Program grant for CTH NN to a trail located adjacent to the new Town park land, State Highway 39 – Without objection, the Board granted Chair Narveson the power to sign the agreement with the Wisconsin Department Natural Resources to transfer the trail location per the terms stipulated by the DNR.

18. Plan Commission – August 17, 2023 minutes – The minutes were reviewed by those Board members in attendance.

14. Adjourn – Motion to adjourn made by Supervisor Hoesly; second by Supervisor Streiff. Meeting adjourned at 7:17 PM.

Approved:

Transcribed from Supervisor Streiff notes by John Wright, Clerk-Treasurer

DRAFT

New Glarus Fire District

Equalized Valuation Figures

2024

(Prepared September 25, 2023)

2024 Fire District Budget

\$230,100.00

Municipality	Equalized Valuation 2022	Equalized Valuation 2023 http://www.revenue.wi.gov/equ/report2.html	Valuation Percentage (%) of all Municipalities	Percent (%) Proposed Fire District Budget minus 2% Dues	2% Dues	Total Budget Needs
Village of New Glarus	\$256,689,200.00	\$305,075,100.00	40.5896 (%)	\$83,263.42	\$10,133.25	\$93,396.67
Town of New Glarus	\$257,628,200.00	\$287,119,900.00	38.2007 (%)	\$77,352.19	\$10,547.62	\$87,899.81
Town of Primrose	\$68,900,910.00	\$77,726,885.00	10.3414 (%)	\$21,623.96	\$2,171.60	\$23,795.56
Town of York	\$63,124,893.00	\$67,476,960.00	8.9777 (%)	\$18,114.69	\$2,543.00	\$20,657.69
Town of Perry	\$12,760,154.00	\$14,210,108.00	1.8906 (%)	\$3,924.60	\$425.67	\$4,350.27
TOTAL	\$659,103,357.00	\$751,608,953.00	100.0000(%)	\$204,278.86	\$25,821.14	\$230,100.00

2024 New Glarus Fire District Budget

FIRE DISTRICT	2024 Budget
Administration	
Trustee Salaries	\$ 2,940.00
District Secretary	\$ 1,200.00
Treasurer	\$ 780.00
District President	\$ 120.00
District Vice President	\$ 60.00
Mileage	\$ -
Office Supplies	\$ 250.00
Miscellaneous	\$ 650.00
Office Help	\$ 500.00
District Audit	\$ 5,000.00
Total Administration	\$ 11,500.00
Housing	
Heating	\$ 3,500.00
Utilities	\$ 9,000.00
Telephone	\$ 4,000.00
Maintenance	\$ 14,000.00
Long Range Maintenance	\$ -
Insurance	\$ 16,000.00
Supplies	\$ 400.00
Cleaning	\$ 3,600.00
Total Housing	\$ 50,500.00
TOTAL FIRE DISTRICT	\$ 62,000.00
FIRE DEPARTMENT	
Personnel	

Chief	\$	4,000.00
Assistant Chiefs	\$	3,200.00
Training Coordinator (2%)	\$	-
Fire Inspection (2%)	\$	1,000.00
Mileage	\$	300.00
Fire Fighter Service,Captains, Lieutenants	\$	32,000.00
Work Comp Insurance	\$	3,600.00
Swani Insurance	\$	3,800.00
Hepatitis Vaccine	\$	300.00
Membership-Publication	\$	1,300.00
Training - PED - Pen Fun (2%)	\$	1,000.00
LOSA (2%)	\$	13,000.00
Total Personnel	\$	63,500.00
First Response		
Equipment	\$	500.00
Supplies	\$	500.00
Training	\$	2,000.00
First Response Service		
Total First Response	\$	3,000.00
Operations		
Breathing Apparatus	\$	11,100.00
Fire Protection Equipment (2%)	\$	8,500.00
Apparatus Repair - Maintenance	\$	20,000.00
Equipment Repair - Maintenance	\$	6,000.00
Radio Equipment	\$	2,000.00
Radio Repair	\$	2,000.00
Disposable Supplies	\$	1,000.00
Fuel - Oil	\$	5,000.00

Protective Clothing & Replacement	\$	18,000.00
Hoses & Appliances (2%)	\$	3,000.00
Motorola Radio Project	\$	25,000.00
Total Operations	\$	101,600.00
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TOTAL FIRE DEPARTMENT	\$	168,100.00
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TOTAL BUDGET NUMBER	\$	230,100.00

New Glarus Fire Department Apparatus Replacement Schedule

Inventory ID	Name	Description	New	Recommended Replacement
E3	Engine 3	2500 gallon pumper/tanker (1750gmp pump)	2002	2027
E2	Engine 2	1000 gallon pumper (1500gpm pump)	2020	2045
S1	Squad 1	750 gallon (1500gpm pump) pumper/heavy rescue	2009	2034
T1	Tender 1	2000 gallon (1250gpm pump)	2014	2039
B1	Brush 1	Brush unit	2003	2028
C1	Car 1	Utility Truck/Brush unit during brush fire season	2011	2031-33
C2	Car 2	Command Car/First Response Vehicle	2023	2043

CONTRACT FOR MAINTENANCE ASSESSMENT SERVICES

Prepared for the
Town of New Glarus
Green County

By



**Appleton Office
W6237 Neubert Rd. | P.O. Box 291
Greenville, WI 54942-0291
Phone (920) 749-1995/Fax (920) 731-4158**

Lake Geneva Office
Walworth County
Lake Geneva, WI 53147

Ironwood, Michigan Office
Ironwood, MI 49938

Hurley Office
Iron County
Hurley, WI 54534

CONTRACT FOR MAINTENANCE ASSESSMENT SERVICES

This Contract is by and between the **Town of New Glarus, Green County, State of Wisconsin**, a body corporate and politic (hereafter referred to as "Municipality") and **Associated Appraisal Consultants, Inc.**, with its principal office at W6237 Neubert Road, Appleton, WI 54913 (hereafter referred to as "Assessor").

IN CONSIDERATION of the mutual promises contained herein, the parties hereto do agree as follows:

I. SCOPE OF SERVICES. All services rendered shall be completed in full accordance and compliance with Wisconsin Statutes, the *Wisconsin Property Assessment Manual* and all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue as of the date of this Contract. This Contract is being provided under the assumption all property records are in digital format. Digital property records include digital photographs, sketches and property record data compliant with the Wisconsin Department of Revenue mandates. In the event the property assessment records are not digital, there shall be additional costs charged to the Municipality for collection and or conversion.

A. INSPECTIONS. The following inspection cycle is to be completed by the Assessor annually:

- 1) New construction, annexed properties, and properties with a change in exemption status shall be physically inspected, and the property record card prepared or updated as needed.
- 2) Properties affected by building removal, fire, significant remodeling (those requiring a building permit), or other major condition changes shall be physically inspected.
- 3) Improved properties under construction over the term of the contract years shall be re-inspected.
- 4) All sales properties, legal description changes, and zoning changes shall be reviewed and inspected if deemed necessary to ensure an accurate and fair assessment.
- 5) Requests for review by property owners, made after the close of the municipal Board of Review, and prior to signing the affidavit for the next assessment roll, shall be physically inspected during the current assessment cycle.
- 6) A classification review shall be conducted annually to determine eligibility for agricultural use value assessment and the assessment of agricultural forestland and undeveloped land.

B. PARCEL IDENTIFICATION. The legal description and size of each land parcel shall be contained in the existing property records. The drawings and measurements of each primary improvement shall be contained in the existing property records. For all new records, the Assessor shall provide digital drawings and digital photographs of each primary improvement. In the event of a discrepancy found in existing records, the Assessor shall investigate and correct the record.

C. PREPARATION OF RECORDS. Appropriate records shall be used in the evaluation and collection of data for residential improvements, commercial improvements, and agricultural improvements. All information relating to the improvements shall be obtained and shown as provided on the respective forms. The Assessor shall supply to the Municipality a complete set of property records in a computer readable format compatible with the Municipality's computer system and update records within fourteen (14) days of final adjournment of the Board of Review. Records shall be updated prior to open book and again to reflect any changes made at Board of Review.

D. APPROACH TO VALUE. Assessor shall assess all taxable real estate according to market value, as established by professionally acceptable appraisal practices, except where otherwise provided

by law. Assessor shall consider the sales comparison approach, the cost approach and the income approach in the valuation of all property.

- 1) **Sales Comparison Approach.** Assessor will collect, compile and analyze all available sales data for the Municipality in order to become familiar with the prevailing market conditions and activity. A detailed analysis of sales data will be prepared, including pictures of recent residential and agricultural sales. Vacant land sales will also be compiled and analyzed. In valuing property by the sales comparison approach, subject properties will be appraised through a detailed comparison to similar properties that have recently sold, making careful consideration of similarities and differences between the subject and comparable sale properties.
- 2) **Cost Approach.** The cost approach to value will be considered for all taxable improved property. Replacement costs for residential and agricultural improvements will be calculated per Volume II of the *Wisconsin Property Assessment Manual* or similar cost manual. Replacement costs for commercial improvements will be calculated using Marshall & Swift valuation service or similar cost manual. All accrued depreciation, including physical deterioration, functional obsolescence, and economic obsolescence will be accurately documented and deducted from current replacement costs.
- 3) **Income Approach.** Consideration of the income approach to value will be made when the income or potential income generated by the real estate is deemed likely to affect the property's resale value. Data to be analyzed will include economic rents, typical vacancy rates and typical operation expense ratios. In the valuation of property by the income approach, adequate records will be prepared, showing a reconstruction of income and expenses, as well as all calculations used to arrive at market value, including formulas and capitalization rates as appropriate to the type of property being appraised.

E. **ASSESSMENT NOTICES.** A notice of changed assessment as prescribed under §70.365, Wis. Stats., shall be mailed for each applicable taxable parcel or property whose assessed value has changed from the previous year. The notice form used shall be that prescribed and or approved for use by the Department of Revenue and include the time and place of when the open book conference(s) and board of review meeting(s) will be held. Assessor shall be responsible for the preparation and timely mailing of all assessment notices by First Class Mail.

F. **OPEN BOOK.** Upon completion of the Assessor's review of assessments and prior to completion of the assessment roll, the Assessor shall hold open book conferences for the purpose of enabling property owners or their agents to review and compare the assessed values. The Assessor shall take the phone calls to schedule appointments for the open book conference as needed. The Assessor shall be present at the open book conference for a time sufficient to meet with the property owners or their agents and shall be present at least two (2) hours or as needed. Assessor shall provide necessary staff to handle projected attendance.

G. **COMPLETION OF ASSESSMENT ROLL AND REPORTS.** The Assessor shall be responsible for the proper completion of the assessment roll in accordance with current statutes and the Wisconsin Property Assessment Manual. The Assessor shall provide final assessment figures for each property to the Municipality, and the roll shall be totaled to exact balance. Assessor shall arrange and provide the Personal Property and Real Estate Assessment Roll for viewing by the public as prescribed in Chapter 5 of the Wisconsin Property Assessment Manual, as amended each year, and adhere to any county or Municipality business requirements as prescribed under §70.09(3)(c), Wis. Stats. Assessor shall prepare and submit all reports required of the Assessor by the Wisconsin Department of Revenue.

H. **BOARD OF REVIEW.** Assessor shall attend all hearings of the Municipal Board of Review to explain and defend the assessed value and be prepared to testify under oath regarding the values determined. In the event of appeal to the Wisconsin Department of Revenue or Circuit Court, Assessor shall be available upon request of Municipality to furnish testimony in defense of the values determined for up to eight employee hours per parcel. Testimony in excess of eight employee hours will require an

addendum to this Contract. If deemed necessary by both parties, any outside counsel services requested by the Assessor shall be provided and paid for by the Municipality as agreed upon by both parties.

I. **PERSONAL PROPERTY ASSESSMENTS.** The Assessor shall prepare and distribute annual personal property statements to all businesses. Each year the Assessor will review statements and follow up with un-filed or incorrect statements. The Assessor shall determine the appropriate assessment. The Assessor shall exercise particular care so that personal property as a class on the assessment roll bears the same relation to statutory value as real property as a class.

J. **MONTHLY MUNICIPAL PERMIT FEE.** Manufactured and Mobile home statement of monthly municipal permit fee calculations shall be completed. Assessor shall maintain an electronic copy of the property record data for each account as contained on the PA-117 form, Manufactured & Mobile Home Valuation Worksheet or similarly approved form as prescribed in Chapter 5 of the Wisconsin Property Assessment Manual, as amended each year.

K. **OPEN RECORD REQUESTS.** The Assessor shall timely respond to all open record requests received by the Assessor. In so doing, the Assessor shall comply with the confidentiality provisions of the Wisconsin Statutes, including §70.35(3), Wis. Stats., regarding the personal property return, §70.47(7)(af), Wis. Stats., regarding income and expense information provided to the Assessor and board of review; and §77.265, Wis. Stats., regarding the real estate transfer return.

L. **AVAILABILITY.** The Assessor shall maintain telephone service to receive calls from the Municipality or property owners five days a week from 8:00 a.m. to 4:30 p.m. excluding holidays and Assessor time off. Internet and voicemail communication are available twenty-four hours per day. The Assessor shall timely respond to all telephone inquiries within four business days or sooner. The Assessor shall copy the municipal clerk on those issues that have been raised to the clerk or board and subsequently passed on to the Assessor. Assessor shall be available to attend Town meetings at the request of the Municipality for up to two (2) hours annually not including annual assessment required meetings. Any additional meetings the Assessor shall be asked to attend beyond two (2) hours shall be compensated at the customary rates charged by the Assessor. The Municipality and the Assessor shall discuss the cost prior to attendance.

M. **MUNICIPALITY RECORDS.** The Municipality shall allow access and make available to the Assessor municipal records such as, but not limited to, previous assessment rolls and property assessment records, sewer, and water layouts, permits, tax records, records of special assessments, plats, condominium documents, maps, and any other pertinent documents currently in the possession of the Municipality at no cost. If such records necessary for our work are not in the possession of the Municipality, Assessor shall obtain them from the County Surveyor, Register of Deeds, or other sources at the Municipality's expense.

N. **MAPS.** Municipality shall provide at no cost to Assessor any plat maps, zoning maps, cadastral maps, GIS related maps, or any other maps currently in the possession of the Municipality. If such maps necessary for our work are not in the possession of the Municipality, Assessor shall obtain them from the County surveyor, Register of Deeds, or other sources at the Municipality's expense.

O. **MAILING SERVICES.** The Municipality shall be responsible for the cost of all postage and mailing services. This cost includes, but is not limited to, personal property forms, notices of changed assessment, written requests to view property, questionnaires, and mailing of documents such as maps and assessment rolls. If Municipality requires Assessor to send any letters by certified mail, Municipality shall be responsible for the postage and mailing services costs of all certified mail.

II. GENERAL REQUIREMENTS

A. **OATH OF OFFICE.** As Assessor is a corporation, the person designated as responsible for the assessment shall take and subscribe to an oath or affirmation supporting the Constitution of the United States and to the State of Wisconsin and to faithfully perform the duties of Assessor. The oath shall conform to §19.01, Wis. Stats., and be filed with the Municipal Clerk prior to commencing duties.

Assessor shall assume the appointed office of Town Assessor as per §60.307 and §70.05(1), Wis. Stats., for the duration of this Contract and shall perform all statutory duties appertaining to such office. The Assessor shall be considered a public officer and afforded the protection from civil liability under §895.46(1), Wis. Stats., for carrying out duties while acting within the scope of the Assessor's employment as an officer of the Municipality. As such, and except for those claims and liabilities based upon alleged intentional or negligent acts of Assessor, Municipality shall hold harmless Assessor from all claims and liabilities relating to the assessment or taxation of property, including but not limited to claims made under §74.35, and §74.37, Wis. Stats., and any circuit court claims, unless otherwise specified in this Contract.

B. QUALIFICATIONS AND CONDUCT OF PERSONNEL. The Assessor shall provide at its own expense any personnel necessary and shall comply with the following:

- 1) All personnel providing services shall be currently certified in compliance with §70.05 and §73.09, Wis. Stats., and the administrative rules prescribed by the Wisconsin Department of Revenue.
- 2) Assessor's field representatives shall carry photo identification cards.
- 3) All employees, agents, or representatives of the Assessor shall conduct themselves in a safe, sober, and courteous manner while performing services within the Municipality.
- 4) The Assessor shall review any complaint relative to the conduct of the Assessor's employees and take appropriate corrective action. If the Municipality deems the performance of any of Assessor's employees unsatisfactory, the Assessor shall, for good cause, remove such employees from work upon written request by Municipality, such request stating reasons for removal.

C. INSURANCE. The Assessor agrees as follows:

- 1) The Assessor shall obtain and maintain during the term of this Contract full coverage insurance to protect and hold harmless the Municipality which insurance is to include:

(a) Workers Compensation State of Wisconsin requirements

(b) General Liability

General Aggregate	\$ 2,000,000
Products/Completed Operations	\$ 1,000,000
Each Occurrence	\$ 1,000,000
Personal & Advertising	\$ 1,000,000
Fire Damage	\$ 100,000
Medical Expense	\$ 10,000

(c) Comprehensive Auto Liability

Combined Single Limit	\$ 1,000,000
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- 2) The Assessor shall provide the Municipality with certificates for all required insurance, with the Municipality as a named insured. All insurance coverage shall contain a 10-day advance notice of cancellation to the Municipality. The Assessor shall timely pay all insurance premiums.

- 3) Liability for bodily injury, disability, and/or death of employees or any person or for damage to property caused in any way, directly or indirectly, by the operations of the Assessor within the Municipality shall be assumed by that Assessor.

D. **OWNERSHIP OF RECORD.** All records prepared or maintained in connection with assessments in the Municipality shall at all times be and remain the sole property of the Municipality, including (a) all records prepared in connection with assessments in the Municipality including, but not limited to property records, personal property forms, maps, and any other schedules or forms, (b) all records and materials obtained from the municipality and not previously returned to include maps, and Assessor's records, and (c) materials specifically obtained and/or used for performance of assessment work for the Municipality, to include aerial photos, maps, depth factor tables, copies of leases, correspondence with property owners, sales data, copies of real estate transfer returns, and operating statements of income property, and (d) if the record system is computerized, at a minimum, provide that the software be able to create an exportable text file of data (e) if the Municipality requires a conversion of the electronic assessment records to a neutral file format, such as but not limited to a text file format or a tab delimited format, the Municipality shall pay the actual cost of such conversion.

III. TERM AND TERMINATION

A. **TERM.** The term of this Contract is for the **2024, 2025, and 2026** assessment year(s). The Assessor shall have completed all work under this Contract on or before the fourth Monday in April or 45 days thereafter, excluding appearances beyond the Board of Review. The date of completion may be extended, if necessary, under the terms of this Contract and by mutual consent.

B. **TERMINATION.** Either party may terminate this Contract only with cause, cause being defined as default of the other party of terms of this Contract upon sixty (60) days written notice to the other party. Upon termination by either party, Assessor shall deliver to the Municipality all records and materials in Assessor's possession used or created during this Contract. During the 60-day wind down period, both Assessor and the Municipality shall act in good faith with each other and cooperate in the orderly transfer of records. If termination occurs during the course of ongoing assessment work, the Assessor shall be paid for work completed as of the date of termination on a percentage basis in light of all work to be performed during the year of termination.

C. **ENTIRE CONTRACT.** This Contract contains the complete and entire Contract between the parties and may not be altered or amended except in writing, executed, making specific references to this Contract, by a duly authorized officer of the Assessor and by a duly authorized official of the Municipality.

D. **AUTOMATIC RENEWAL.** This Contract will automatically renew for successive annual assessment years upon the expiration of the original term unless either party, on or before July 1 of the preceding year, notifies the other party by certified mail of their desire to non-renew.

IV. COMPENSATION

- A. The Municipality shall pay the Assessor **Fifteen Thousand Dollars (\$15,000.00)** for each of the 2024, 2025, and 2026 assessment year(s) for maintenance assessment services.
- B. The compensation due to the Assessor shall be paid in monthly or quarterly installments throughout the 2024, 2025, and 2026 assessment year(s).
- C. **Renewal Adjustments:** An increase of not more than five percent (5.0%) may be applied on an annual basis for each year of automatic renewal after 2026.
- D. Additional compensation that may be due to the Assessor as a result of services that are beyond the scope of this Contract will be invoiced in the month subsequent to the month in which the services were provided.

E. **Optional Website Posting:** The Municipality shall have the option to post assessment data on our website for an additional cost of a penny and an eighth per parcel per month ($$.018 * 1,036 = \18.65) payable to a third-party vendor (pass-through expense only). This monthly charge is subject to change annually based on our third-party vendor-imposed fees and any parcel count changes.

*** Please initial yes or no to post data to the website. ***

Yes ___ No ___

V. **SIGNATURES**



Mark Brown
President
Associated Appraisal Consultants, Inc.

07/26/2023

Date

Authorized Signature
Town of New Glarus

Date



ASSESSMENT SERVICES PROPOSAL

PREPARED FOR:

Town of New Glarus



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Accurate agrees to all scope of work expressed in the RFP sent by the Village of Reedsville. There is no charge for the cost of this proposal submission. Accurate is an independent assessment firm and will never outsource our assessing services to an outside contractor. We are fully insured have provided a sample insurance in the Appendix of this proposal.

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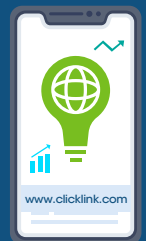
SUMMARY.....

This proposal is built to be INTERACTIVE!

Throughout this document you will see QR codes. Use your cell phone camera app and point your camera at the QR code. A link will pop up. Click on the link to watch videos, visit websites and much more!



Open your camera app and hover your phone over the QR Code. Your camera will automatically scan the QR code.



A clickable link will appear. Select the link and enjoy the content!

Test this link to our website!



Viewing this as a digital copy? You can click the QR codes to view the content in the proposal.

INTRODUCTION

We appreciate the opportunity to serve the Town of New Glarus!

For over 23 years, Accurate Appraisal has continuously improved the assessment experience through **innovation, education, and technology**. We understand that New Glarus is a unique community, therefore we will provide you solutions tailored to fit your specific needs.



We firmly believe that every property owner comes first. They should be part of the assessment process and not just an end result. We work hard to make sure **everyone is treated fairly and equitably**.

TRANSPARENCY

is our core principle in educating and empowering those we serve.
our employees.
municipalities.
the community.

OUR CORE VALUES:



1. WE ARE FAMILY

We have an unwavering loyalty to each other and our customers. We Respect & Encourage each other and appreciate uniqueness. We value and support each other's health, safety and work/life balance.



4. BE ADMIRABLE

We guard our integrity by doing the right thing - ALWAYS. We strive for quality and precision in our work, our products, and our services. We act like owners and honor our word and commitments. We choose candor, respect, and kindness.



2. ALWAYS TRANSPARENT

We are Open & Honest in ALL interactions, sharing our data, processes, information, mistakes, and victories. We hold each other accountable. Our availability to our customers and family members is abundant.



5. WE ARE A BOATLOAD OF FUN!

Positivity is our attitude of choice. We have infectious spirits bringing enthusiasm and excitement to all we do. We are passionate and value diversity and inclusion. There's no reason too small to celebrate.



3. EMBRACE GROWTH & INNOVATION

We are comfortable being uncomfortable while striving to get better every day. We foster and enhance customer relationships while seeking to learn and develop. We offer to teach and mentor customers and family members.



Our Mission:

Engaging our employees to collaborate, educate, and deliver the most reliable and transparent assessment solutions through innovation, communication and technology.

ASSESSMENT TEAM

Your assessment team has access to over **195 YEARS** of assessing experience!

Our approach of the **Assessment Team** means each assessor coordinates their efforts from accountability officers to our field team and customer service. Throughout the entire assessment process - field work, attending open books and closing boards of review, our services are completed as a team. You will have full access to Amanda as your main point of contact throughout the contract.

Amanda Meade
Customer Experience Manager

Upon Selection
Statutory Assessor

Jamie Busha
Quality Manager

Amy Baji
Personal Property Coordinator

Terri Muskevitsch
Customer Service Manager

Chris Plamann
Marketing and PR

30 EMPLOYEES

27 ASSESSOR I & II

3 ASSESSOR III



Bill Gaber is the overall operations manager. He is an assessor II and III with over 12 years of assessing experience. Bill mentors all of our assessors by reviewing the WPAM and sharing knowledge sessions with our entire assessment staff. This ensures we are following DOR guidelines. Bill communicates with leaders from the DOR to build a strong relationship so when it comes time for a market update we are all on the same page.

Amanda Meade is your customer experience manager. You will have access to her for tracking the workload, pulling reports, regular bi-weekly meetings and any training you may need. She manages our customer service staff and ensures your community is treated fairly and respectfully.

Upon Selection You may pick your statutory assessor. Your assessor will be overseeing the field work and verifying the roll. They will manage the open book process before board of review. They will sign the roll & defend cases at board. Your assessor will be an assessor II certified assessor.

Jamie Busha is your quality manager. She leads a team of 3 that reviews all changes made during the assessment process before notices are sent. She is an assessor II with 10 years of experience.

Amy Baji has over 13 years of assessing experience. She will verify personal property accounts and post the assessment rolls online. Her #1 goal is to minimize dooimages. She is an assessor II.

Terri Muskevitsch is our senior customer service agent. Terri works closely with commercial property owners that call or email our office. She will track correspondence to share with you. Terri is an assessor II, for over 16 years.

Chris Plamann will be involved in building an intentional community education plan. He will post education on facebook weekly, build mailings and social media content to educate property owners.



PROUD PARTNERS WITH:



Wisconsin Association of Assessing Officers

EXPERIENCE MANAGER

I WILL HELP YOU SELECT YOUR STATUTORY ASSESSOR

AMANDA MEADE

Customer Experience Manager

amandam@accurateassessor.com 920.460.4688



ABOUT ME

I am an optimistic and outgoing person that loves to try new things. I love to travel! Around the US, the world and especially within Wisconsin! I am highly organized and dedicated with great problem-solving skills. I love to work with a great team and develop new ideas. In my free time I love to spend time with my big family. I am so excited about working with many different people toward common goals.

"If you can be anything in the world, be kind"

EXPERIENCE

- Previous Assessment Experience
- Management of Over 100 Municipalities
- Oversee Regular Workload Meetings
- Education of Board Members and Clerks on the Assessment Process
- Understanding of the WPAM
- Build Relationships with Administrators and Mayors
- GIS mapping
- Experience with Prolorem - CAMA System

WORK HISTORY

Executive Director
Non Profit - 7 years

Executive Director
Preschool - 10 years

STRENGTHS/SKILLS

Problem Solver	Organized
Professional	Communication
Building Relationships	Empathetic
Personable	Consistent

TRAINING



NATIONAL OSHA
FOUNDATION



"The only way to do great work is to love what you do."

CUSTOMER SERVICE

When property owners call us they get a live person.

Our agents are trained assessors that answer questions quickly and educate property owners on the assessment process. Our **online appointment scheduling tool** is available 24/7.

Property owners have full access to us on our main line, email address, and over the phone appointments. We utilize a visual voicemail service which speeds up our response time. Voicemails are monitored daily to we make sure respond within 24 to 48 hours. All of these services are included at no additional cost to you.



MEET OUR CUSTOMER SERVICE TEAM MEMBERS:



"Being the first connection with property owners, my goal is to be able to help them understand the process of assessing and how it affects them. Being a property owner, I understand how confusing and daunting the process can seem. It is extremely rewarding when I answer their questions, help them understand the process, and make someone's day a little better."

TERRI MUSKEVITSCH since 2007

Customer Service Manager - Assessor II

terrim@accurateassessor.com 920.749.8098



"Talking with property owners on a daily basis gives me the opportunity to educate them on the assessment process. I take it as a challenge to convey positivity when not all of my interactions start out that way. Fairness and equity is paramount in my job and I take it very seriously."

AMY BAJI since 2011

Your statutory assessor - Assessor II

amyb@accurateassessor.com 920.749.8098



"The best feeling in the world is hanging up a phone and knowing I was able to help property owners understand their assessment. My background in hospitality gives me the tools I need to be empathetic to their needs. I have been known to make people laugh - because my laughter is infectious."

PATTI PETERS since 2010

Customer Service - Assessor I

pattip@accurateassessor.com 920.749-8098

ASSESSMENT TIMELINE

Before January of each year we will send you options for open book and board of review dates. We will work with you to schedule new construction checks, field work, data entry, and the date notices are mailed. Below is a standard outline of what happens throughout the assessment timeline.

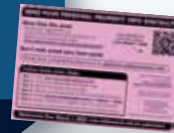
JANUARY

We start every year by visiting new construction to verify the % completion of new property. Trespass notices are mailed to property owners so they know we will be in the area.

If the property is not complete as of January 1st (each year) we update our records accordingly and flag the parcel/s for a final visit to measure and list the property as complete.



Personal Property post cards are mailed with digital submission options available.



This timeline may change depending on the agreed upon dates for Open Book and Board of Review. We are flexible on the date for Open Book and Board of Review.

FEB-MAR

New construction field checks are reviewed and verified by our office. Sales, permits, exemptions and any other assessment related data is updated in our records.

Initial DOR equalized values are reviewed. Personal Property is collected. Every personal property blotter is saved digitally.

During the market update - education is implemented through social media, newsletters, and custom content.



APRIL-MAY

Properties are sorted and mapped for field inspections based on permits, sales, inspection requests, etc. Assessors update data on premise with their laptops.

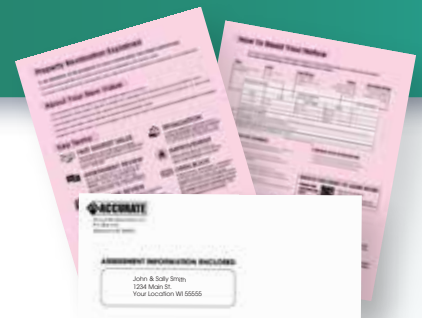
Initial market statistics from recent sales are calculated. Properties are segmented into neighborhoods to compare market values of like/similar property.



JUNE-JULY

Initial values are forecasted. Value checks are performed and revisions are made. Our import/export team works with the county to verify assessment and mailing data. Initial statutory board meeting must be held if needed.

Notices are printed and mailed. Every notice includes an educational insert with links to videos and FAQ's. Rolls are posted online.



AUGUST

The assessment review period starts. Property owners can contact Accurate by phone, email, or online appointment. The open book period begins the day they receive their notice up to 7 days before board of review begins.

Final rolls are verified with the county and prepared for Board of Review. The assessor signs the final roll.



WORKLOAD

Your account manager will meet with your team throughout the year to go over accountability and workload. **There will be a standard agenda to ensure open communication and that all metrics are being followed.** Below is an example of a progress report that will be created to ensure you know the progress of current processes.

City of Kenosha Interim Market Update (2024)

		Project Start:	Mon, 7/24/2023				Jul 24, 2023							Jul 31, 2023							Aug 7, 2023							Aug 14, 2023										
		Display Week:	1				24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
TASK	ASSIGNED TO	PROGRESS	START	END	TOTAL	DAYS																																
							LEFT																															
Education / Publication																																						
Prep and share Education Plan	Chris	100%	8/1/23	8/30/23	30	-19																																
Update website - Add video	Chris	1%	8/1/23	4/1/24	245	196																																
Create content on current Res Market	Chris	1%	8/1/23	4/1/24	245	196																																
Initiate education through all forms of communication	Chris	1%	9/1/23	9/30/23	30	12																																
Mill Rate Education with Tax Bill (if allowed)		100%	11/1/23	12/31/23	61	61																																
Prepare notice letter and insert for 2024 market update (if allowed)		1%	11/1/23	4/1/24	153	153																																
Connect Accurate's Facebook to Kenosha website		1%	1/1/24	1/15/24	15	15																																
Send Mailer		1%	1/15/24	4/1/24	78	78																																
Use all avenues of Education		1%	2/1/24	4/1/24	61	61																																
Additional education on the BOA and BOR		1%	5/1/24	5/31/24	31	31																																
Data Transfer & Analysis																																						
Data Transfer		1%	1/1/24	1/15/24	15	15																																
Code Table Data Reviews & Return		1%	1/1/24	3/30/24	70	70																																
Fieldwork (Permits & New Construction)																																						
Permit Reviews (Verify permits (occ) and what our next step is, actionable or non-actionable)(Value partial Construction)		5%	8/14/23	12/31/23	140	104																																
Commercial Permit Value (Permits completed after 1/1/23 (value them))		5%	8/14/23	12/31/23	140	104																																
New Construction Checks		1%	8/14/23	12/31/23	140	104																																
New Construction Alterations/Progress		1%	8/14/23	12/31/23	140	104																																
Ag Checks (Kenosha mails letter, Lori onsite visit)		100%	9/8/23	9/29/23	22	11																																
Ag Checks (Kenosha 2nd letter, data update)		100%	10/1/23	11/15/23	46	46																																

Four main annual meetings will cover:

Kick-Off Meeting:

Setting the Open Book and Board dates, education plan with reminders, reviewing the notice letter, preparing the timeline for assessments, compare permits to make sure we have all of them.

Pre Open Book Meeting:

Preparing your board with educational materials they need, reviewing the assessment rolls with the clerk, reminders about when to send out education.

Pre Board of Review Meeting:

Cover the expectations at the BOR, go over all objections to ensure we have all of them, reminder to set meeting after board ensuring the manufacturing values are in the roll for export to Milwaukee county.

End of the Year Wrap Up:

What went well, what needs to be addressed, prep for late fall field work, prepare for the next assessment year.

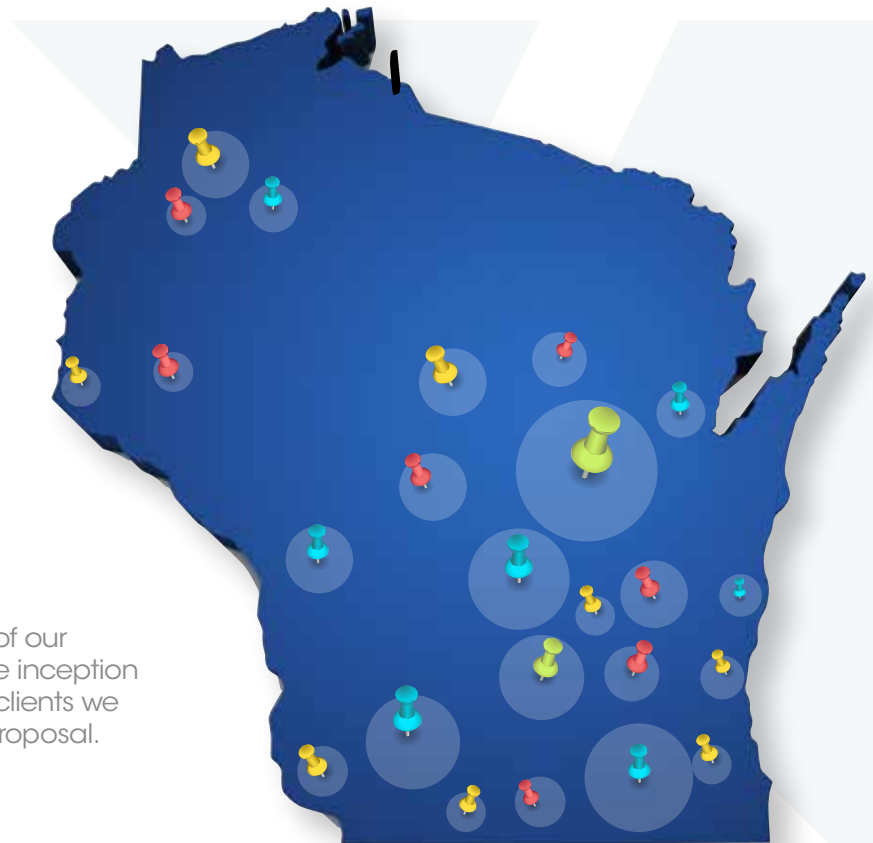
WHO WE SERVE

ALL - PROPERTY OWNERS
ALL - EMPLOYEES
105 - MUNICIPALITIES
22 - COUNTIES

We serve a variety of municipalities across the state. From small towns to large cities, we focus on one thing. **Putting property owners first.**

A phrase we often hear is, **"You're not a typical assessor,"** and we are proud of that. We strive to be inclusive and understanding with everyone we serve. Our passion to embrace growth and innovation stems from low assessment standards.

We value **transparency** in everything we do. We work with board and council members, commercial property owners, homeowners, real estate agents, and the list goes on and on. The common theme is that no matter who you are, at Accurate we will work late and go the extra mile to serve property owners. Don't think of us as a contract assessor, think of us as **a trusted advisor here to serve you and your community.**



Our client retention rate is 99%. Many of our customers have been with us since the inception of our company. A list of all municipal clients we serve is on the following page of this proposal.

MUNICIPAL CLIENT LIST

MUNICIPALITY	TYPE	POPULATION	EQ VALUE	PARCELS	SERVICE
Kenosha	City	99,986	9,129,723,600	29,901	BLEND
Franklin	City	35,451	3,608,867,300	11,971	FULL VALUE
Manitowoc	City	32,936	1,392,199,900	12,374	BLEND
De Pere	City	24,893	1,618,168,000	7,664	FULL VALUE
Grand Chute	Town	23,831	3,325,751,400	7,154	MAINTENANCE
Watertown	City	22,926	1,203,821,500	7,351	BLEND
Fox Crossing	Village	18,892	1,198,650,600	6,246	FULL VALUE
Onalaska	City	18,712	1,405,385,500	5,895	BLEND
Cudahy	City	18,200	904,066,900	5,877	FULL VALUE
Oconomowoc	City	16,847	1,898,997,800	6,160	FULL VALUE
Beaver Dam	City	16,476	740,557,500	5,545	FULL VALUE
River Falls	City	15,800	934,801,400	1,450	BLEND
Whitefish Bay	Village	14,747	2,913,528,800	4,814	BLEND
Whitewater	City	14,517	433,367,500	2,607	FULL VALUE
Shorewood	Village	13,338	1,418,231,600	3,848	BLEND
Stoughton	City	13,134	937,153,400	4,427	FULL VALUE
Glendale	City	12,779	1,065,226,500	5,030	BLEND
Baraboo	City	12,556	664,887,100	4,116	MAINTENANCE
Platteville	City	12,537	411,313,800	2,831	BLEND
Brown Deer	Village	11,964	674,445,400	4,264	BLEND
Greenville	Town	11,874	1,218,445,000	4,445	FULL VALUE
Harrison	Village	11,532	1,128,775,500	4,307	BLEND
Two Rivers	City	11,271	666,263,700	4,729	BLEND
Burlington	City	10,668	670,648,100	3,435	FULL VALUE
Monroe	City	10,661	559,462,700	4,055	BLEND
Oregon	Village	10,390	1,121,101,700	3,634	FULL VALUE
Portage	City	10,365	408,028,900	3,181	FULL VALUE
Elkhorn	City	9,853	556,333,700	3,163	FULL VALUE
Sparta	City	9,522	400,746,900	3,157	FULL VALUE
New Richmond	City	8,966	700,313,500	3,483	FULL VALUE
Altoona	City	8,929	510,581,300	2,666	BLEND
McFarland	Village	8,449	916,289,300	3,072	FULL VALUE
Delavan	Town	8,385	1,027,819,100	3,609	BLEND
Monona	City	8,179	985,590,300	2,944	FULL VALUE
Windsor	Village	7,795	901,574,900	2,836	BLEND
Sheboygan Falls	Town	7,435	154,644,400	772	BLEND
Mount Horeb	Village	7,421	676,653,100	2,484	BLEND
Vernon	Village	7,227	1,054,853,500	2,947	BLEND
Buchanan	Town	7,082	584,171,400	2,407	FULL VALUE
Beloit	Town	7,038	462,018,800	3,288	BLEND
Edgerton	City	5,552	364,170,300	2,140	FULL VALUE
Rothschild	Village	5,325	333,417,900	2,132	BLEND
Saukville	Village	4,419	300,885,500	1,449	BLEND
Prairie du Sac	Village	4,378	363,372,900	1,581	BLEND
Bayside	Village	4,377	595,016,700	1,622	FULL VALUE
Prescott	City	4,229	312,132,400	1,471	BLEND
Geneva	Town	4,099	912,896,900	3,755	BLEND
Mosinee	City	4,063	212,596,800	1,726	BLEND
Sugar Creek	Town	3,973	382,156,500	1,953	BLEND
Chilton	City	3,828	177,642,000	1,493	BLEND
Lancaster	City	3,760	192,492,400	1,591	BLEND

MUNICIPALITY	TYPE	POPULATION	EQ VALUE	PARCELS	SERVICE
Combined Locks	Village	3,588	314,834,700	1,369	BLEND
Seymour	City	3,443	74,979,700	1,252	MAINTENANCE
Lyons	Town	3,440	388,811,700	1,782	BLEND
Menominee	Town	3,422	346,963,000	1,525	BLEND
Pleasant Springs	Town	3,387	481,121,500	1,435	FULL VALUE
Boscobel	City	3,231	103,974,100	1,176	BLEND
Fulton	Town	3,158	413,981,200	2,216	FULL VALUE
Wescott	Town	3,135	386,545,700	2,554	BLEND
Brillion	City	3,127	151,267,700	1,127	BLEND
Dale	Town	2,842	252,326,200	1,151	BLEND
Walworth	Town	2,842	195,945,900	685	BLEND
Walworth	Village	2,824	164,495,100	955	BLEND
Union	Town	2,776	178,423,300	732	MAINTENANCE
Fox Lake	Town	2,709	203,679,900	938	BLEND
Dayton	Town	2,703	384,094,600	1,723	MAINTENANCE
Deerfield	Town	2,524	173,654,500	650	BLEND
Pacific	Town	2,518	390,961,700	1,332	BLEND
Poynette	Village	2,494	170,308,900	880	BLEND
Caledonia	Town	2,491	180,754,800	974	BLEND
Dekorra	Town	2,350	351,865,400	1,448	BLEND
Deerfield	Village	2,319	228,122,300	981	BLEND
Jefferson	City	2,231	400,186,600	2,747	FULL VALUE
Spring Prairie	Town	2,197	261,805,500	894	BLEND
New Glarus	Village	2,172	168,495,500	808	MAINTENANCE
Albion	Town	2,103	188,271,100	1,058	BLEND
Jamesstown	Town	2,077	174,781,600	1,023	BLEND
Pardeeville	Village	2,067	126,196,300	849	BLEND
Blooming Grove	Town	1,911	137,158,700	683	BLEND
Richmond	Town	1,835	228,604,700	1,039	BLEND
Randolph	Town	1,767	38,841,400	331	BLEND
Fontana	Village	1,713	1,303,832,100	2,712	BLEND
Darien	Town	1,588	126,297,100	565	MAINTENANCE
Springdale	Town	1,530	311,257,100	855	BLEND
Cambridge	Village	1,518	137,183,600	665	BLEND
Cleveland	Village	1,477	95,219,800	587	BLEND
Brooklyn	Village	1,466	115,985,800	495	BLEND
Eldorado	Town	1,443	99,975,300	618	BLEND
West Baraboo	Village	1,428	60,537,900	464	BLEND
Hazel Green	Village	1,200	60,805,000	398	MAINTENANCE
Berry	Town	1,188	176,335,000	544	MAINTENANCE
Green Valley	Town	1,072	54,147,900	501	MAINTENANCE
Oregon	Town	1,053	432,821,500	1,258	BLEND
Marathon	Town	1,048	76,147,200	489	BLEND
Blue Mounds	Village	971	71,354,300	297	BLEND
Footville	Village	810	38,412,500	338	BLEND
Primrose	Town	774	67,890,400	341	BLEND
Cambria	Village	753	29,585,400	326	BLEND
Perry	Town	737	59,221,900	353	BLEND
Sullivan	Village	669	37,904,600	232	BLEND
Upham	Town	647	169,759,000	942	BLEND
Rose	Town	595	59,950,200	488	BLEND
Courtland	Town	510	20,890,400	241	BLEND
Coloma	Village	456	17,531,000	252	BLEND
Friesland	Village	356	13,642,600	160	MAINTENANCE

BLEND

Years of maintenance with an interim market updated at least one year of the contract.

MAINTENANCE

Review of permits, new construction, splits, etc.

FULL VALUE

Annual Interim Market Updates performed every year.

225,842 - IMPROVEMENTS



OUR HISTORY

Accurate was **founded 23 years ago** on **complete Transparency and Communication.**

For many years it was common practice for assessment firms to suppress information from the public. This resulted in a lack of understanding and mistrust within the community. The founders of Accurate recognized these shortcomings and began pioneering **new innovative assessment standards.**

Over the years we have developed web-based digital property record cards, created online scheduling options, and built our own CAMA to update data digitally in the field. With a combined experience of **over 195 years** Accurate has continuously improved the assessment experience through **innovation, education, and technology.**

2000 - 2005

20 municipalities
Building digital data online
New Website
Full Value Service Options
Blend Options - more affordable and budget friendly

2010 - 2015

90 Municipalities
Still growing - added more employees
Purchased the building we rented

2005 - 2010

75 municipalities
Online scheduling available
Moved to new location on Midway Rd.
Growing - added new employees

2015 - PRESENT

100+ municipalities
Digital assessments in the field
CAMA software Prolorem
Live assessor certified customer service
Intentional community education plans

At Accurate we make a concerted effort to connect and learn the nuances of each community. There is no **"cookie-cutter"** way to assess unique communities. We tailor our services to fit the needs of everyone we serve. **Here is a small sample:**

UNIQUE ASSESSMENTS

Views of the Capital Building - Dane County
Views of the lake - Fontana
Bayshore Mall - Glendale
Access to the Chain of Lakes - Dayton
All of Menominee County
Dock-O-Miniums - Fontana

CORPORATE BUSINESS

Secura - Fox Crossing
Johnson Controls - Glendale
Foth - De Pere
Miron - Fox Crossing
Cleary Building - Greenville
Humana Insurance - De Pere

TAX EXEMPT EXPERIENCE

St. Norbert College - De Pere
Divine Savior Hospital - Portage
Skaalen Retirement Services - Stoughton

DISTRIBUTION/WAREHOUSING

WALMART Distribution center - Beaver Dam
Amazon - Greenville
TARGET - Oconomowoc

ALL INCLUSIVE SERVICES

- ✓ **FREE** Web Data Access
- ✓ **CUSTOM** Community Education
- ✓ **LIVE** Customer Service
- ✓ **CLOUD** Based Assessment Software

- Access to a dedicated assessor certified Account Manager
- Online appointment scheduler
- Telephone and Virtual Open Book appointments
- Customized videos and educational materials
- Active live chat function available on our website
- Dedicated quality management
- Virtual walk-through options
- Maintenance inspections



POSITIVE INTERACTION

We take pride in our **interaction and communication** with municipal officials, property owners, and state employees. **Our commitment to transparency and education** ensures we create a positive interaction with those we serve. Below are some examples:

W Wendy Helgeson
1 review
★★★★★ 8 months ago
I enjoy working with the staff at Accurate Appraisal. They are quick to respond and extremely easy to work with!
👍 2

S Susan Tweedy
1 review
★★★★★ a month ago
I requested Accurate Appraisal to please reassess our property value after a jump of almost 48% since the last appraisal. Jill Luebke, an appraiser at the company, worked on my case. With my own research and analysis in hand, she demonstrated a clear understanding of my concerns and the math that went into her own re-assessment. She was thoughtful and polite but even more importantly, a highly capable and methodical worker who walked me through each data input and factor weighting. I still wish it were lower (as this appraisal is an input into our eventual tax assessment), but the framework she employed was reasonable and equitable. In conjunction with her knowledge and professionalism, Jill couldn't have been a better person to work with on this dispute. She's a real gem!

T Tina Moore
6 reviews · 1 photo
★★★★★ a month ago
Accurate Appraisal re-assessed my house with a market adjustment. I spoke with Alanna who explained in great depth the process of re-assessing homes and provided me with valuable information to understand their process and state statutes regarding home values.

J Jennifer O'Handley
3 reviews
★★★★★ a year ago
I had received a notice of changed assessment on my recently purchased home. It was a lot higher than I was anticipating and I wrote an email, inquiring what the basis for increase was.

After receiving a reply, I scheduled a time to speak to the assessor because their information was demonstrably incorrect. I had a phone conversation with Miranda yesterday, explained the situation and I was blown away by her understanding and reasonableness.

After she sent me the amended amount today, I sent this email back and it's how I truly feel encapsulated my experience:

M Michael Busterud
4 reviews · 1 photo
★★★★★ 2 years ago
Reply

Accurate Appraisal
1428 Midway Rd, Menasha, WI
★★★★★

We understand not all of our reviews are 5 star. We promise to continue to make the assessment experience the best for every property owner we serve.

Accurate builds relationships with your community! For example our Personal Property department created an instructional video on our website showing how to fill out PP statements.

"Just wanted to let you know, I was not looking forward to filling out the form. But the instructional video and the information on your website made the process a lot easier than I thought it would be. Thank you!"

Barr Resort - Kika Barr

Our assessors go above and beyond just valuing property. The classification of land changed for this property owner. We helped him by working with the DOR on properly classifying his land.

"Paul at Accurate was very helpful with my land classification and working with the DOR. He was very gracious and professional through the journey."

Primrose Resident - Duane Wagner



EDUCATION PLAN

Our education plan puts your community first. We utilize your channels of communication to educate your community. Together we will create a **two-way channel of communication** through social media, council meetings, newsletters, post card mailings, custom videos, and much more!

Most assessors do not prepare early for property owners and municipal officials. The first time owners find out about a market update is typically **30 days** before the board of review.

A one-way channel of communication is not transparent and leaves property owners scrambling to figure out what is going on. Often times this creates a rift between property owners, the municipality and the assessor.

6 STEPS TO EDUCATION:

1. WEEKLY SOCIAL MEDIA



Every week we share content on social media for you to share with your community. We mix this with a schedule of postings over the coming year to let property owners know what to expect and the status of the current market. Involving the community ensures we have two-way communication through the assessment process.

2. COUNCIL MEETINGS



Your community will inevitably have questions about the how assessments work. We will attend council meetings to educate your members arming them with the knowledge they need to explain the assessment process with property owners.

3. NEWSLETTER/MAILING

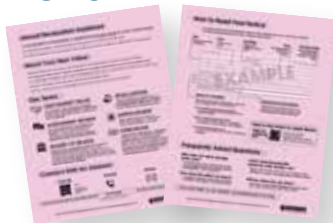
We have custom newsletter content that explains assessments, what to expect, and the schedule of social media postings to keep your community engaged. We will help you enhance the connection you have with your property owners.

4. WEBSITE



Updating your website with a custom video helps explain what an interim market updated is and what to expect. We will build links to property record info and educational FAQ's for the market update. The community utilizes your website as a resource, we serve them best by keeping them up to date.

5. NOTICES



A notice of new value will be mailed to every property owner. Inserted with the notice will be an Understanding Your Assessment sheet explaining the assessment process with QR codes, links to videos, an online appointment scheduler, and access to our customer service team.

6. OPEN BOOK & BOR

Our Open Book process is very flexible and allows property owners to contact us by online appointment, phone, email with plenty of time before board of review. Roll Books are posted online and we help prepare clerks for any cases before the Board of Review.



SOCIAL MEDIA

We post content twice a week. Through **Social Media** we build a positive and informative **two-way communication** with your community. We encourage you to review other assessment firm's social media so you can see the content and judge for yourself.

We instantly connect with thousands of property owners to **quell the stigma of taxes and assessed values**. When you don't involve your community they feel left out and discouraged about the assessment process. **Our transparency ensures property owners are engaged** so they don't feel like they're just another un-informed taxpayer.

5 FACT CHECKS ABOUT ASSESSMENTS

MYTH

Assessors raise property value to collect more taxes.

Assessed values only go up, they never go down.

The assessor didn't visit my house, they don't know the condition of my property.

Assessed values can only be 5 to 10 years.

My neighbor's house is in the same condition as mine, but I am assessed more.

FACT

Assessed values cannot be used to increase or decrease taxes. Assessors don't set tax rates.

Assessed values tend to follow market values. Over time, assessments increase and decrease just as the market does.

Assessors have a database of every property that is updated regularly through permits, sales, and reviewing property periodically.



UPLOAD PERSONAL PROPERTY ONLINE

VISIT: accurateassessor.com/personal-property

SELECT: Your municipality

ENTER: Your account number

UPLOAD YOUR PERSONAL PROPERTY FROM ONLINE

DO NOT VISIT YOUR OFFICE

WHAT'S A MILL RATE?

The Mill Rate is calculated by dividing the total taxes needed by the total assessed value of the community. An increase in assessed value does not equate to an increase in your taxes.

MILL RATE = TOTAL TAXES NEEDED / TOTAL ASSESSED VALUE

If it is a simple mathematical fact, if taxes stay the same and assessed values increase the mill rate will fall and your taxes will stay about the same.

Taxes are set annually by these 4 entities:

- Municipality
- School District
- County
- Technical College

2021

Assessed Value: \$140,000
x Mill Rate: .018
Taxes: \$2,520

35% COMMUNITY-WIDE INCREASE MARKET-WIDE ACTUAL

2022

Assessed Value: \$189,000
x Mill Rate: .013

2023 HOUSING MARKET FACT SHEET

BROWN COUNTY, WI

MEDIAN PROPERTY VALUES INCREASED BY 12.5% FROM 2021 to 2022

\$240,000 IN 2021 | \$270,000 IN 2022

Brown County property values have been increasing year after year. When property values are re-assessed your assessment changes to mirror the current market.

The interest hike in 2022 was meant to slow down market. However, the housing shortage has not demand. This is evident in the property value in drop in the number of homes sold.

FOR SALE

3,233 HOME SALES IN 2022 (3,671 SALES IN 2021)

11.9% Drop in the # of homes sold

-1.9% # of sale JANU 206 IN 2021 | 202 IN 2022

Presented by: Accurate



DID YOU KNOW?

The State of WI is a Market Value state. Assessors are obligated to use a full year (or multiple previous years) worth of sales to determine your assessed value.

In 2022, based on statistics from the Wisconsin Realtors Association, the average property value increased 8% to 10% higher than 2021.

Even if property values drop significantly in 2023, assessors are not allowed to use sales from the current year to determine value. If you would like to know more about the assessment process please read the 2023 Property Owners Guide.

LEARN MORE! VISIT: accurateassessor.com

CHECK US OUT ONLINE!



www.facebook.com/accurateappraisalllc



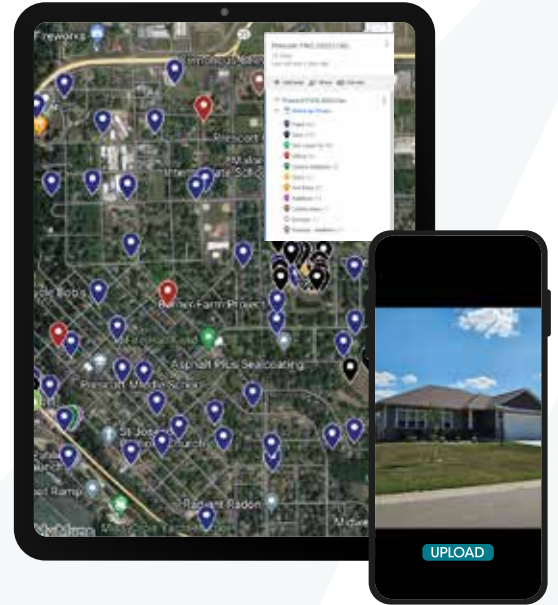
www.linkedin.com/company/accurate-appraisal-llc



SOFTWARE

The CAMA system we use is completely **CLOUD BASED.**

There are no costs for the software and no cost to convert your current data. Property information will be available on your website **FREE** to you and your community **24/7**. Each parcel shows detailed **images and information** and offers a digital option for sales questionnaires and personal property. Reports of any kind can be generated for your needs.



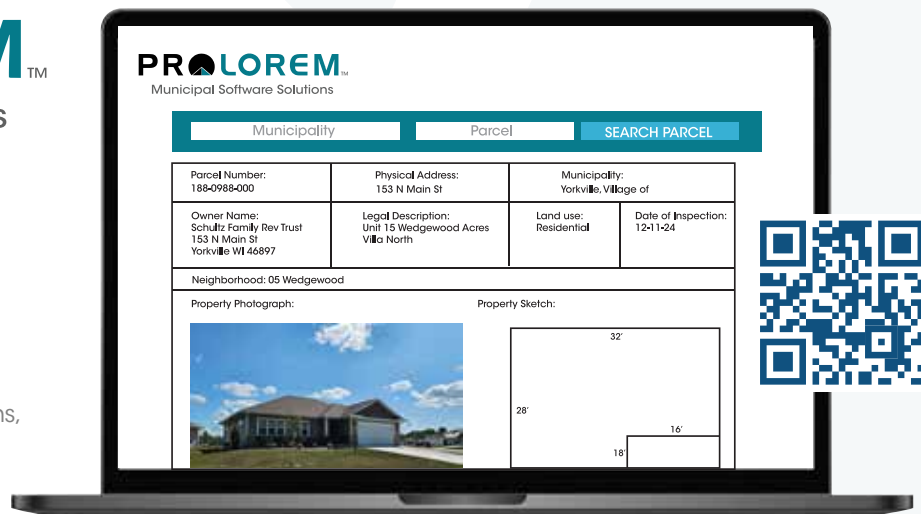
Our assessors are trained to **value and update properties on premise**, eliminating errors from re-entering data. When we take a new picture of a house or add a permit, that data is live instantly. **PROLOREM** is the only software that updates online property record information **in real-time**.

Your employees and property owners will be able to access the assessment data from any computer or mobile device. **PROLOREM** integrates multiple platforms such as: GIS, Apex Sketching Tool, iWorQ, etc. We will never charge you for access or any cost to convert your data. It's your data, not ours. You will never be charged to update or license our software.

PROLOREMTM
Municipal Software Solutions

SOFTWARE COST: \$0.00
LICENSING/MAINTENANCE: \$0.00
SOFTWARE:
INTEGRATION ABILITY: YES, \$0.00
CONVERSION ABILITY: YES, \$0.00

There are never additional costs for conversions, updates, licensing, integrations, additions, etc.



SERVICE OPTIONS

The service options below are reflective of our all-inclusive services. **There will never be an additional invoice for any reason.** The city may retain 10% of the total fee subject to delivery of certified tax roll.

3 YEAR MAINTENANCE

3 Maintenance Years

	2024	2025	2026	Total
Assessment Services	Maintenance	Maintenance	Maintenance	Maintenance
Annual Cost	\$12,000	\$12,000	\$12,000	\$36,000

January 1, 2024 through December 31, 2026

5 YEAR BLEND

4 Maintenance Years, 1 Market Update

	2024	2025	2026	2027	2028	Total
Assessment Services	Maintenance	Maintenance	Maintenance	Market Update	Maintenance	Blend
Annual Cost	\$24,000	\$24,000	\$24,000	\$24,000	\$24,000	\$120,000

January 1, 2024 through December 31, 2026

RECOMMENDED

ADD-ON INSPECTION COST

Annual Total

Exterior Only	\$24,000	\$4,800
Interior/Exterior	\$48,000	\$9,600

Exterior Inspections: We recommend an exterior inspection be performed for this contract. We will inspect the exterior of all buildings. Re-measure and take new images of all improvements as well as review the data on file is current. The last inspections took place in 2007. We recommend the inspections be completed 1/5 of all properties each year, to be spread throughout the next 5 years.

Interior Inspections: This option would include an interior inspection of properties as well as exterior inspection process. This option is the most expensive and with new statutes that allow property owners to deny entry would not garner much new data. If you choose this option we would recommend spreading out the inspections over the contract.

The service option recommended would be the **5 year blend** with exterior inspections. The contract would be an **ANNUAL TOTAL: \$27,600** Including the Permit Portal option.

Maintenance:

We will inspect all permits, new construction and any demolitions. Every sale will be entered and reviewed. If there are changes to condition or missing information we will update the data to reflect. Any request for inspection from your community will also be visited during a maintenance year.

Interim Market Update:

We will conduct the same services as in a maintenance year. On top of our maintenance services every year we will break down each property by neighborhood, style, age, location etc. Each will be evaluated and re-assessed to its new fair market value. A notice of new value will be mailed to the property owner. It is important to maintain a schedule of social media education to ensure your community understands how the assessment process works.

PROLOREM PERMIT PORTAL DISCOUNT

Apply for a Permit

Other users can also apply for a permit through the online permit portal.



Currently your permit submissions aren't fully digital. Property owners go to your website and download paper pdf forms, fill them out by hand and mail or email them to you.

Select our assessment services and the annual pricing will be **reduced by \$1,200** and we will set you up with an online **Prolorem Permit Portal!***

*Permit charges will apply

Would you like to see additional options? We will work with you to customize any assessment plan to fit your community's needs.



REFERENCES



DE PERE

Accurate Appraisal has served as the statutory assessor for the City of De Pere since 2005. In 2018, the City decided to adopt their annual Full Value Maintenance program. This transition has been beneficial to the City, because market trends over the past few years would have otherwise forced another city-wide revaluation. It also makes budget planning easier by supplying consistent information year-to-year. Our account manager at Accurate is extremely knowledgeable, and has always been responsive to our questions and needs. Accurate's proactive public relations campaign, which provides social media posts and additional website content, has been very helpful in communicating with and educating our citizens.

Carey Danen
CLERK/TREASURER

www.deperewi.gov
cdanen@mail.de-pere.org
(920) 339-4072 ext 1355



HARRISON

Working with Accurate makes my job as Clerk-Treasurer a lot easier. The Village of Harrison has a range of rural, urban, and lake front property and is one of the fastest growing communities in Wisconsin. Averaging over 300 building and remodeling permits and 100 parcel changes annually, I am very thankful to have an Accurate assessor to work with. Accurate's assessors are very knowledgeable and make me confident we are following all the State guidelines and filing reports correctly. I appreciate having a dedicated assessor and team assigned to our municipality. They are available and always willing to answer questions, both from Village staff and our residents. Our assessor and the Village staff have built a great professional relationship. He knows our community, he knows our history, he knows our weaknesses and strengths, he knows our future goals, and he knows how to be fair, equitable, and accurate.

Vicki Tessen
CLERK/TREASURER

www.harrison-wi.org
clerk@harrison-wi.org
(920) 989-1062 ext 5



Accurate Appraisal has professionally served as the Assessor for the Village of Fox Crossing since 2015. Over the past several years, Accurate Appraisal expertly conducted a full revaluation of the Village in 2017, and has maintained the Village at full value since 2019. A full value contract with Accurate Appraisal has provided a tremendous benefit to Fox Crossing. With the large increase in property values over the past few years, having the Village's assessed value grow incrementally over the past several years rather than a large increase in value in one year, is much easier to explain to Village residents. Accurate Appraisal has been a great partner with Fox Crossing in managing the difficult task of assessing.

Jeffrey S. Sturgell
Village Manager

www.fccommunity.com
JSturgell@foxcrossingwi.gov
(920) 720-7101



GREENVILLE

We have worked with Accurate over the last three years, who performed a total revaluation of our municipality. Their leadership in the industry is one of the reasons why we chose Accurate as our Assessor. Their friendly, reliable service is why we continue to utilize Accurate. Timely, professional response has been appreciated and we trust them to serve our residents with dependable service and fair assessments.

Wendy Helgeson
CLERK

www.townofgreenville.com
whelgeson@greenvillewi.gov
(920) 757-5151 ext 1100

Project/Service: Annual Market Updates
Statutory Assessor: Kyle Kabe



SUMMARY

Thank you for taking the time to look over our proposal. Our philosophy of **TRANSPARENCY** as well as our core values help guide our company and ensures that we are treating municipal officials and property owners fairly & equitably.

Our cloud based assessment CAMA is the most advanced in the industry. All of your data is saved digitally online so you and your community can find property information quickly and easily. **The best part is, it's FREE to both you and your property owners.** You will also receive a reduction in price is available if you use Prolorem's Online Permit Portal.

You will have access to **one main point of contact in your account coordinator.** They will be available to your municipal employees for questions, to help provide assessment information, and be available whenever you need them.

We provide a comprehensive customer service solution. Our **three LIVE assessor certified customer service representatives** answer questions quickly and, if needed, make adjustments on the spot over-the-phone.

Our website offers a 24/7 online appointment calendar. We will track every interaction with your community throughout the assessment process and share this information at the board of review every year.

We will help you with a progressive **education plan** to build positive interactions with your employees and community. No other assessment firm provides weekly educational content such as social media posts, educational videos, newsletter content and much more!

Our **Core Values** express who we are as a company. **We Are Family** - doesn't just mean our employees are family. **We embrace you and your community as our family as well.** We believe in sharing the assessment process with everyone. Trust is important to us! **Transparency** between the property owners, the Town of New Glarus and the assessor is paramount in building a successful assessment program.



INSURANCE

APPENDIX A

This sample insurance copy is for reference. A copy of this insurance will be automatically emailed to you annually to save in your files. If you would like additions or changes to the insurance we can make those any time at no additional cost to you.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
9/19/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Fox Cities Insurance A Division of Ansay & Associates 4351 W College Ave Suite 310 Appleton WI 54914		CONTACT NAME: Theresa Vorpahl	
		PHONE (A/C, No, Ext): 920-739-0424	FAX (A/C, No): 920-560-7079
		E-MAIL ADDRESS: Theresa.Vorpahl@ansay.com	
		INSURER(S) AFFORDING COVERAGE	NAIC #
		INSURER A: West Bend Mutual Insurance Company	15350
		INSURER B: Houston Specialty Insurance Company	12936
		INSURER C:	
		INSURER D:	
		INSURER E:	
		INSURER F:	

INSURED ACCUAPP-01
Accurate Appraisal, LLC & Municipal Assessment Software Sol
PO Box 415
Menasha WI 54952

COVERAGES **CERTIFICATE NUMBER:** 1287743460 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			1421930	2/22/2023	2/22/2024	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COM/PROP AGG \$ 6,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			1421930	2/22/2023	2/22/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			1421930	2/22/2023	2/22/2024	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		Y/N N/A	1421932	2/22/2023	2/22/2024	PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ 100,000 E.L. DISEASE - EA EMPLOYEE \$ 100,000 E.L. DISEASE - POLICY LIMIT \$ 500,000
B	Professional Liability			MEO-HS-0003754-00	10/3/2022	10/3/2023	Limit 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER	CANCELLATION
Village of Reedsville	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Theresa Vorpahl</i>

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2024 Local Traditional Plan with Dental (PO2)

With Dental (See Tab 2 for Rates without Dental)

Monthly Premiums (Participants without Medicare)

	Local Traditional Health Plan	
	Individual	Family
Aspirus Health Plan	\$1,279.04	\$3,160.32
Common Ground Healthcare Cooperative	\$1,205.78	\$2,977.16
Dean Health Plan	\$1,043.70	\$2,571.96
Dean Health Plan - Prevea360 East	\$1,004.82	\$2,474.76
Dean Health Plan - Prevea360 West and Mayo Clinic Health System	\$1,145.66	\$2,826.86
GHC of Eau Claire Greater Wisconsin	\$1,148.56	\$2,834.12
GHC of Eau Claire River Region	\$1,225.82	\$3,027.26
GHC-SCW Dane Choice	\$862.30	\$2,118.46
GHC-SCW Neighbors	\$948.04	\$2,332.82
HealthPartners Health Plan Southeast	\$1,351.94	\$3,342.56
HealthPartners Health Plan West	\$1,363.02	\$3,370.26
Medical Associates Health Plans	\$843.12	\$2,070.52
MercyCare Health Plans	\$897.36	\$2,206.12
Network Health	\$1,056.34	\$2,603.56
Quartz Central	\$1,355.22	\$3,350.76
Quartz UW Health	\$934.50	\$2,298.96
Quartz West	\$911.06	\$2,240.36
Robin with HealthPartners Health Plan	\$1,413.18	\$3,495.66
Security Health Plan	\$1,343.04	\$3,320.32
State Maintenance Plan (SMP) by Dean Health Plan	\$1,033.10	\$2,545.48
	Local Access Plan	
	Individual	Family
Access Plan by Dean Health Plan	\$1,289.10	\$3,185.48

2024 Local Traditional Plan without Dental (PO2)

Without Dental (See Tab 1 for Rates with Dental)

Monthly Premiums (Participants without Medicare)

	Local Traditional Health Plan	
	Individual	Family
Aspirus Health Plan	\$1,246.96	\$3,080.12
Common Ground Healthcare Cooperative	\$1,173.70	\$2,896.96
Dean Health Plan	\$1,011.62	\$2,491.76
Dean Health Plan - Prevea360 East	\$972.74	\$2,394.56
Dean Health Plan - Prevea360 West and Mayo Clinic Health System	\$1,113.58	\$2,746.66
GHC of Eau Claire Greater Wisconsin	\$1,116.48	\$2,753.92
GHC of Eau Claire River Region	\$1,193.74	\$2,947.06
GHC-SCW Dane Choice	\$830.22	\$2,038.26
GHC-SCW Neighbors	\$915.96	\$2,252.62
HealthPartners Health Plan Southeast	\$1,319.86	\$3,262.36
HealthPartners Health Plan West	\$1,330.94	\$3,290.06
Medical Associates Health Plans	\$811.04	\$1,990.32
MercyCare Health Plans	\$865.28	\$2,125.92
Network Health	\$1,024.26	\$2,523.36
Quartz Central	\$1,323.14	\$3,270.56
Quartz UW Health	\$902.42	\$2,218.76
Quartz West	\$878.98	\$2,160.16
Robin with HealthPartners Health Plan	\$1,381.10	\$3,415.46
Security Health Plan	\$1,310.96	\$3,240.12
State Maintenance Plan (SMP) by Dean Health Plan	\$1,001.02	\$2,465.28
	Local Access Plan	
	Individual	Family
Access Plan by Dean Health Plan	\$1,257.02	\$3,105.28

Program Option: P02 WPE Traditional +Dental			88% of Tier 1 Qualified Plans' Average Premium					
2024 Rates * = Not in calculation - Plan not qualified in county			Single			Family		
County	Tier	Carrier	Maximum Employer Share	Minimum Employee Share	Total Premium	Maximum Employer Share	Minimum Employee Share	Total Premium
Forest								
	3	Aspirus Health Plan	\$909.13	\$369.91	\$1,279.04	\$2,240.02	\$920.30	\$3,160.32
	*	GHC of Eau Claire Greater Wisconsin	\$909.13	\$239.43	\$1,148.56	\$2,240.02	\$594.10	\$2,834.12
	1	State Maintenance Plan (SMP) - Dean	\$909.13	\$123.97	\$1,033.10	\$2,240.02	\$305.46	\$2,545.48
	3	Access Plan - Dean	\$909.13	\$379.97	\$1,289.10	\$2,240.02	\$945.46	\$3,185.48
Grant								
	2	Dean Health Plan	\$741.95	\$301.75	\$1,043.70	\$1,822.06	\$749.90	\$2,571.96
	3	GHC of Eau Claire Greater Wisconsin	\$741.95	\$406.61	\$1,148.56	\$1,822.06	\$1,012.06	\$2,834.12
	1	Medical Associates Health Plans	\$741.95	\$101.17	\$843.12	\$1,822.06	\$248.46	\$2,070.52
	3	Quartz Central	\$741.95	\$613.27	\$1,355.22	\$1,822.06	\$1,528.70	\$3,350.76
	2	GHC-SCW Neighbors	\$741.95	\$206.09	\$948.04	\$1,822.06	\$510.76	\$2,332.82
	3	Access Plan - Dean	\$741.95	\$547.15	\$1,289.10	\$1,822.06	\$1,363.42	\$3,185.48
Green								
	2	Dean Health Plan	\$909.13	\$134.57	\$1,043.70	\$2,240.02	\$331.94	\$2,571.96
	3	GHC of Eau Claire Greater Wisconsin	\$909.13	\$239.43	\$1,148.56	\$2,240.02	\$594.10	\$2,834.12
	*	MercyCare Health Plans	\$897.36	\$0.00	\$897.36	\$2,206.12	\$0.00	\$2,206.12
	3	Quartz Central	\$909.13	\$446.09	\$1,355.22	\$2,240.02	\$1,110.74	\$3,350.76
	1	State Maintenance Plan (SMP) - Dean	\$909.13	\$123.97	\$1,033.10	\$2,240.02	\$305.46	\$2,545.48
	3	Access Plan - Dean	\$909.13	\$379.97	\$1,289.10	\$2,240.02	\$945.46	\$3,185.48
Green Lake								
	3	Common Ground Healthcare Cooperative	\$929.58	\$276.20	\$1,205.78	\$2,291.13	\$686.03	\$2,977.16
	2	Dean Health Plan	\$929.58	\$114.12	\$1,043.70	\$2,291.13	\$280.83	\$2,571.96
	1	Network Health	\$929.58	\$126.76	\$1,056.34	\$2,291.13	\$312.43	\$2,603.56
	3	Quartz Central	\$929.58	\$425.64	\$1,355.22	\$2,291.13	\$1,059.63	\$3,350.76
	3	Robin with HealthPartners	\$929.58	\$483.60	\$1,413.18	\$2,291.13	\$1,204.53	\$3,495.66
	3	Access Plan - Dean	\$929.58	\$359.52	\$1,289.10	\$2,291.13	\$894.35	\$3,185.48

2023 Local Traditional Plan with Dental (PO2)

With Dental (See Tab 2 for Rates without Dental)

Monthly Premiums (Participants without Medicare)

	Local Traditional Health Plan	
	Individual	Family
Aspirus Health Plan	\$1,201.70	\$2,971.30
Common Ground Healthcare Cooperative	\$1,123.72	\$2,776.36
Dean Health Plan	\$889.36	\$2,190.46
Dean Health Plan - Prevea360 East	\$901.72	\$2,221.36
Dean Health Plan - Prevea360 and Mayo Clinic Health System	\$1,027.48	\$2,535.76
GHC of Eau Claire Greater Wisconsin	\$898.56	\$2,213.46
GHC of Eau Claire River Region	\$1,158.74	\$2,863.90
GHC of South Central Wisconsin	\$771.12	\$1,894.86
HealthPartners Health Plan Southeast	\$1,218.88	\$3,014.26
HealthPartners Health Plan West	\$1,184.62	\$2,928.60
Medical Associates Health Plans	\$817.60	\$2,011.06
MercyCare Health Plans	\$812.34	\$1,997.90
Network Health	\$955.50	\$2,355.80
Quartz Central	\$1,267.96	\$3,136.96
Quartz - UW Health	\$854.54	\$2,103.40
Quartz West	\$1,012.60	\$2,498.56
Robin with HealthPartners Health Plan	\$1,364.38	\$3,378.00
Security Health Plan	\$1,256.52	\$3,108.36
State Maintenance Plan (SMP) by Dean Health Plan	\$949.54	\$2,340.92
	Local Access Plan	
	Individual	Family
Access Plan by Dean Health Plan	\$1,187.92	\$2,936.86



Town of New Glarus

Transaction Detail by Account

September 14 - October 11, 2023

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE	DEBIT
10000 DDA 2306 - 2 - 1								
10/11/2023	Check	21258	Associated Appraisal Consultants	Voided - VOID, misprint	51530 Assessor Salary/Contract	0.00	0.00	\$0.00
10/11/2023	Check	21259	Auto Value New Glarus	Voided - Void, blank check damaged	53311 Hwy & Street Admin (Local):53311-20 Equipment Repairs	0.00	0.00	\$0.00
10/11/2023	Bill Payment (Check)	21260	Auto Value New Glarus		21000 Accounts Payable (A/P)	-27.98	-27.98	
10/11/2023	Bill Payment (Check)	21261	Blanchardville Co-op Oil Association		21000 Accounts Payable (A/P)	-635.56	-663.54	
10/11/2023	Bill Payment (Check)	21262	Brenda's Blumenladen		21000 Accounts Payable (A/P)	-69.18	-732.72	
10/11/2023	Bill Payment (Check)	21263	Carter & Gruenewald Co Inc		21000 Accounts Payable (A/P)	-34.48	-767.20	
10/11/2023	Bill Payment (Check)	21264	Computer Know How		21000 Accounts Payable (A/P)	-203.00	-970.20	
10/11/2023	Bill Payment (Check)	21265	Dan Bubolz		21000 Accounts Payable (A/P)	-99.36	-1,069.56	
10/11/2023	Bill Payment (Check)	21266	Green County Highway Department		21000 Accounts Payable (A/P)	-	-	
10/11/2023	Bill Payment (Check)	21267	Helen Beck		21000 Accounts Payable (A/P)	-100.00	138,833.84	
10/11/2023	Bill Payment (Check)	21268	Jamie Zaffino		21000 Accounts Payable (A/P)	-84.41	138,933.84	
10/11/2023	Bill Payment (Check)	21269	Johnson Block and Company, Inc		21000 Accounts Payable (A/P)	-3,800.00	139,018.25	
10/11/2023	Bill Payment (Check)	21270	Judy Gielissen		21000 Accounts Payable (A/P)	-83.10	142,818.25	
10/11/2023	Bill Payment (Check)	21271	Kasieta Legal Group		21000 Accounts Payable (A/P)	-150.00	142,901.35	
10/11/2023	Bill Payment (Check)	21272	New Glarus Hardware		21000 Accounts Payable (A/P)	-13.94	143,051.35	
10/11/2023	Bill Payment (Check)	21273	New Glarus Utilities		21000 Accounts Payable (A/P)	-294.96	143,065.29	
10/11/2023	Bill Payment (Check)	21274	New Glarus Welding		21000 Accounts Payable (A/P)	-60.00	143,360.25	
10/11/2023	Bill Payment (Check)	21275	Pellitteri Waste Systems		21000 Accounts Payable (A/P)	-9,566.25	143,420.25	
10/11/2023	Bill Payment (Check)	21276	Ruth Elmer		21000 Accounts Payable (A/P)	-91.75	152,986.50	
10/11/2023	Bill Payment (Check)	21277	Securian Financial Group, Inc		21000 Accounts Payable (A/P)	-221.54	153,078.25	
10/11/2023	Bill Payment (Check)	21278	Sue Bubolz		21000 Accounts Payable (A/P)	-10.00	153,299.79	
10/11/2023	Bill Payment (Check)	21279	U.S. Postal Service		21000 Accounts Payable (A/P)	-98.00	153,309.79	
10/11/2023	Bill Payment (Check)	21280	Visa		21000 Accounts Payable (A/P)	-86.86	153,407.79	
10/11/2023	Bill Payment (Check)	21281	Visa		21000 Accounts Payable (A/P)	-573.87	153,494.65	
10/11/2023	Bill Payment (Check)	21282	WTA Green County Unit		21000 Accounts Payable (A/P)	-50.00	154,068.52	
10/11/2023	Bill Payment (Check)	21283	Associated Appraisal Consultants		21000 Accounts Payable (A/P)	-625.00	154,118.52	
09/21/2023	Payment	7430	Alice Bertelrud		13000 Accounts Receivable (A/R)	340.00	154,743.52	\$340.00
09/15/2023	Payment	8673	Richard and Ashley Haffner	Check issued from Westconsin Credit Union in New Richmond, WI	13000 Accounts Receivable (A/R)	3,753.09	154,403.52	\$3,753.09
09/29/2023	Check	DD	Direct Deposit		10000 DDA 2306 - 2 - 1	-269.90	150,650.43	
09/29/2023	Check	DD	Direct Deposit	Direct Deposit	10000 DDA 2306 - 2 - 1	269.90	150,920.33	\$269.90
09/15/2023	Transfer			TRANSFER TO MUNICIPAL LEGACY ACCOUNT XXXXXX1623	Repurchase Agreement 1623	-4,000.00	150,650.43	
09/15/2023	Deposit		Ekum Title LLC		Undeposited Funds	25.00	154,650.43	\$25.00
09/18/2023	Deposit				-Split-	4,532.76	154,625.43	\$4,532.76
							150,092.67	



Town of New Glarus

Transaction Detail by Account

September 14 - October 11, 2023

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE	DEBIT
09/18/2023	Expense		Organic Payroll	PAYROLLBILLING BILLING XXXXX6028	51400 General Administrative:51400-03 Software Maintenance Agreements	-59.00	-	
							150,151.67	
09/18/2023	Transfer			TRANSFER TO MUNICIPAL LEGACY ACCOUNT XXXXXX1623	Repurchase Agreement 1623	-5,000.00	-	
							155,151.67	
09/19/2023	Transfer			Transfer of Hallett Impact Fees	Impact Fees 4612	-3,562.00	-	
							158,713.67	
09/19/2023	Deposit				-Split-	262.00	-	\$262.00
							158,451.67	
09/21/2023	Expense		Alliant Energy	Alliant - WPL PAYMENT 2725610000	53420 Street Lighting	-19.45	-	
							158,471.12	
09/21/2023	Expense		Alliant Energy	Alliant - WPL PAYMENT 3936450000	53420 Street Lighting	-9.84	-	
							158,480.96	
09/22/2023	Expense		Wi Department of Employee Trust Funds	Group Insurance ETFPay WS2GPCXXXXX8581	Uncategorized Expense	-4,206.80	-	
							162,687.76	
09/26/2023	Transfer			TRANSFER TO MUNICIPAL LEGACY ACCOUNT XXXXXX1623	Repurchase Agreement 1623	-7,000.00	-	
							169,687.76	
09/26/2023	Deposit				-Split-	5,620.48	-	\$5,620.48
							164,067.28	
09/27/2023	Transfer			Impact Fee transfer for new home W7210 Hustad Valley Road	Impact Fees 4612	-3,562.00	-	
							167,629.28	
09/29/2023	Expense		Wisconsin Retirement System	EMPLOYE TRUST FU WRS REMIT 0880000	21520 21520 Retirement Deductions Payable (WRS)	-1,205.04	-	
							168,834.32	
10/02/2023	Deposit				-Split-	1,659.32	-	\$1,659.32
							167,175.00	
10/02/2023	Transfer			TRANSFER TO MUNICIPAL LEGACY ACCOUNT XXXXXX1623	Repurchase Agreement 1623	-31,000.00	-	
							198,175.00	
10/02/2023	Expense		Organic Payroll	PAYROLLBILLING BILLING XXXXX6028	51400 General Administrative:51400-03 Software Maintenance Agreements	-59.00	-	
							198,234.00	
10/02/2023	Deposit		State of WI - DOA	State of Wisconsin WI PS ACH XXXXXX1641	43531 State Grant - State Transportation Aid	29,968.85	-	\$29,968.85
							168,265.15	
10/03/2023	Expense		Spectrum	SPECTRUM SPECTRUM 8797677	51535 Other Financial Expenses:51600-02 Town Hall Utilities	-257.95	-	
							168,523.10	
10/06/2023	Expense		WE Energy	WE ENERGIES PAYMENT 070451995200001	51535 Other Financial Expenses:51600-02 Town Hall Utilities	-9.90	-	
							168,533.00	
10/06/2023	Expense		WE Energy	WE ENERGIES PAYMENT 070451995200002	51535 Other Financial Expenses:51600-02 Town Hall Utilities	-9.90	-	
							168,542.90	
Total for 10000 DDA 2306 - 2 - 1						\$ -		\$46,431.40
						168,542.90		

Town of New Glarus

Transaction List by Date

September 13 - October 11, 2023

DATE	TRANSACTION TYPE	NUM	POSTING	NAME	MEMO/DESCRIPTION	ACCOUNT	SPLIT	AMOUNT
09/13/2023	Bill Payment (Check)	21239	Yes	Associated Appraisal Consultants		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-625.00
09/13/2023	Bill Payment (Check)	21240	Yes	Audio-Visual Center & Print Shop		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-225.50
09/13/2023	Bill Payment (Check)	21241	Yes	Auto Value New Glarus		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-88.07
09/13/2023	Bill Payment (Check)	21242	Yes	Blanchardville Co-op Oil Association		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-988.12
09/13/2023	Bill Payment (Check)	21243	Yes	Carter & Gruenewald Co Inc		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-17.50
09/13/2023	Bill Payment (Check)	21244	Yes	Green County Highway Department		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-6,179.98
09/13/2023	Bill Payment (Check)	21245	Yes	Harry Pulliam.		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-60.26
09/13/2023	Bill Payment (Check)	21246	Yes	Helen Beck		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-100.00
09/13/2023	Bill Payment (Check)	21247	Yes	M&D Truck and Equipment Sales		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-1,120.00
09/13/2023	Bill Payment (Check)	21248	Yes	Matt Sheaffer		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-50.00
09/13/2023	Bill Payment (Check)	21249	Yes	New Glarus Hardware		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-39.92
09/13/2023	Bill Payment (Check)	21250	Yes	New Glarus Utilities		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-325.04
09/13/2023	Bill Payment (Check)	21251	Yes	News Publishing Co., Inc		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-179.44
09/13/2023	Bill Payment (Check)	21252	Yes	Pellitteri Waste Systems		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-9,527.96
09/13/2023	Bill Payment (Check)	21253	Yes	Securian Financial Group, Inc		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-221.54
09/13/2023	Bill Payment (Check)	21254	Yes	Tammy Narveson		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-120.00
09/13/2023	Bill Payment (Check)	21255	Yes	Total Inspection Services, LLC		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-3,906.29
09/13/2023	Bill Payment (Check)	21256	Yes	Vierbicher		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-3,177.00
09/13/2023	Bill Payment (Check)	21257	Yes	Visa		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-592.88
10/11/2023	Check	21258	Yes	Associated Appraisal Consultants	Voided - VOID, misprint	10000 DDA 2306 - 2 - 1	51530 Assessor Salary/Contract	0.00
10/11/2023	Check	21259	Yes	Auto Value New Glarus	Voided - Void, blank check damaged	10000 DDA 2306 - 2 - 1	53311 Hwy & Street Admin (Local):53311-20 Equipment Repairs	0.00
10/11/2023	Bill Payment (Check)	21260	Yes	Auto Value New Glarus		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-27.98
10/11/2023	Bill Payment (Check)	21261	Yes	Blanchardville Co-op Oil Association		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-635.56
10/11/2023	Bill Payment (Check)	21262	Yes	Brenda's Blumenladen		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-69.18
10/11/2023	Bill Payment (Check)	21263	Yes	Carter & Gruenewald Co Inc		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-34.48
10/11/2023	Bill Payment (Check)	21264	Yes	Computer Know How		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-203.00
10/11/2023	Bill Payment (Check)	21265	Yes	Dan Bubolz		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-99.36
10/11/2023	Bill Payment (Check)	21266	Yes	Green County Highway Department		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-
10/11/2023	Bill Payment (Check)	21267	Yes	Helen Beck		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-100.00
10/11/2023	Bill Payment (Check)	21268	Yes	Jamie Zaffino		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-84.41
10/11/2023	Bill Payment (Check)	21269	Yes	Johnson Block and Company, Inc		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-3,800.00
10/11/2023	Bill Payment (Check)	21270	Yes	Judy Gielissen		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-83.10
10/11/2023	Bill Payment (Check)	21271	Yes	Kasieta Legal Group		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-150.00
10/11/2023	Bill Payment (Check)	21272	Yes	New Glarus Hardware		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-13.94
10/11/2023	Bill Payment (Check)	21273	Yes	New Glarus Utilities		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-294.96
10/11/2023	Bill Payment (Check)	21274	Yes	New Glarus Welding		10000 DDA 2306 - 2 - 1	21000 Accounts Payable (A/P)	-60.00
10/11/2023	Bill Payment (Check)	21275	Yes	Pellitteri Waste Systems		10000 DDA	21000 Accounts Payable (A/P)	-9,566.25

Town of New Glarus

Transaction List by Date September 13 - October 11, 2023

DATE	TRANSACTION TYPE	NUM	POSTING	NAME	MEMO/DESCRIPTION	ACCOUNT	SPLIT	AMOUNT
	(Check)					2306 - 2 - 1		
10/11/2023	Bill Payment	21276	Yes	Ruth Elmer		10000 DDA	21000 Accounts Payable (A/P)	-91.75
	(Check)					2306 - 2 - 1		
10/11/2023	Bill Payment	21277	Yes	Securian Financial Group, Inc		10000 DDA	21000 Accounts Payable (A/P)	-221.54
	(Check)					2306 - 2 - 1		
10/11/2023	Bill Payment	21278	Yes	Sue Bubolz		10000 DDA	21000 Accounts Payable (A/P)	-10.00
	(Check)					2306 - 2 - 1		
10/11/2023	Bill Payment	21279	Yes	U.S. Postal Service		10000 DDA	21000 Accounts Payable (A/P)	-98.00
	(Check)					2306 - 2 - 1		
10/11/2023	Bill Payment	21280	Yes	Visa		10000 DDA	21000 Accounts Payable (A/P)	-86.86
	(Check)					2306 - 2 - 1		
10/11/2023	Bill Payment	21281	Yes	Visa		10000 DDA	21000 Accounts Payable (A/P)	-573.87
	(Check)					2306 - 2 - 1		
10/11/2023	Bill Payment	21282	Yes	WTA Green County Unit		10000 DDA	21000 Accounts Payable (A/P)	-50.00
	(Check)					2306 - 2 - 1		
10/11/2023	Bill Payment	21283	Yes	Associated Appraisal Consultants		10000 DDA	21000 Accounts Payable (A/P)	-625.00
	(Check)					2306 - 2 - 1		
09/21/2023	Payment	7430	Yes	Alice Bertelrud		10000 DDA	13000 Accounts Receivable (A/R)	340.00
						2306 - 2 - 1		
09/15/2023	Payment	8673	Yes	Richard and Ashley Haffner	Check issued from Westconsin Credit Union in New Richmond, WI	10000 DDA	13000 Accounts Receivable (A/R)	3,753.09
						2306 - 2 - 1		
09/29/2023	Check	DD	Yes	Direct Deposit		10000 DDA	10000 DDA 2306 - 2 - 1	-269.90
						2306 - 2 - 1		
09/15/2023	Deposit		Yes	Ekum Title LLC		10000 DDA	Undeposited Funds	25.00
						2306 - 2 - 1		
09/15/2023	Transfer		Yes		TRANSFER TO MUNICIPAL LEGACY ACCOUNT XXXXXX1623	10000 DDA	Repurchase Agreement 1623	-4,000.00
						2306 - 2 - 1		
09/18/2023	Deposit		Yes			10000 DDA	-Split-	4,532.76
						2306 - 2 - 1		
09/18/2023	Expense		Yes	Organic Payroll	PAYROLLBILLING BILLING XXXXX6028	10000 DDA	51400 General Administrative:51400-03 Software Maintenance Agreements	-59.00
						2306 - 2 - 1		
09/18/2023	Transfer		Yes		TRANSFER TO MUNICIPAL LEGACY ACCOUNT XXXXXX1623	10000 DDA	Repurchase Agreement 1623	-5,000.00
						2306 - 2 - 1		
09/19/2023	Transfer		Yes		Transfer of Hallett Impact Fees	10000 DDA	Impact Fees 4612	-3,562.00
						2306 - 2 - 1		
09/19/2023	Deposit		Yes			10000 DDA	-Split-	262.00
						2306 - 2 - 1		
09/21/2023	Expense		Yes	Alliant Energy	Alliant - WPL PAYMENT 2725610000	10000 DDA	53420 Street Lighting	-19.45
						2306 - 2 - 1		
09/21/2023	Expense		Yes	Alliant Energy	Alliant - WPL PAYMENT 3936450000	10000 DDA	53420 Street Lighting	-9.84
						2306 - 2 - 1		
09/22/2023	Expense		Yes	Wi Department of Employee Trust Funds	Group Insurance ETRPay WS2GPCXXXXX8581	10000 DDA	Uncategorized Expense	-4,206.80
						2306 - 2 - 1		
09/26/2023	Deposit		Yes			10000 DDA	-Split-	5,620.48
						2306 - 2 - 1		
09/26/2023	Transfer		Yes		TRANSFER TO MUNICIPAL LEGACY ACCOUNT XXXXXX1623	10000 DDA	Repurchase Agreement 1623	-7,000.00
						2306 - 2 - 1		
09/27/2023	Transfer		Yes		Impact Fee transfer for new home W7210 Hustad Valley Road	10000 DDA	Impact Fees 4612	-3,562.00
						2306 - 2 - 1		
09/29/2023	Expense		Yes	Wisconsin Retirement System	EMPLOYE TRUST FU WRS REMIT 0880000	10000 DDA	21520 21520 Retirement Deductions Payable (WRS)	-1,205.04
						2306 - 2 - 1		
10/02/2023	Deposit		Yes	State of WI - DOA	State of Wiscons WI PS ACH XXXXXX1641	10000 DDA	43531 State Grant - State Transportation Aid	29,968.85
						2306 - 2 - 1		
10/02/2023	Deposit		Yes			10000 DDA	-Split-	1,659.32
						2306 - 2 - 1		
10/02/2023	Transfer		Yes		TRANSFER TO MUNICIPAL LEGACY ACCOUNT XXXXXX1623	10000 DDA	Repurchase Agreement 1623	-31,000.00
						2306 - 2 - 1		
10/02/2023	Expense		Yes	Organic Payroll	PAYROLLBILLING BILLING XXXXX6028	10000 DDA	51400 General Administrative:51400-03 Software Maintenance Agreements	-59.00
						2306 - 2 - 1		
10/03/2023	Expense		Yes	Spectrum	SPECTRUM SPECTRUM 8797677	10000 DDA	51535 Other Financial Expenses:51600-02 Town Hall Utilities	-257.95
						2306 - 2 - 1		
10/06/2023	Expense		Yes	WE Energy	WE ENERGIES PAYMENT 070451995200001	10000 DDA	51535 Other Financial Expenses:51600-02 Town Hall Utilities	-9.90
						2306 - 2 - 1		
10/06/2023	Expense		Yes	WE Energy	WE ENERGIES PAYMENT 070451995200002	10000 DDA	51535 Other Financial Expenses:51600-02 Town Hall Utilities	-9.90
						2306 - 2 - 1		

PARK COMMISSION MEETING

Wednesday, September 20, 2023

Minutes

Attending: Chair Harry Pulliam, Kelly Ruschman, Mark Pernitz, Chris Narveson, Mona Sue French, Jason Neton, and Rose Pertzborn: alternate commissioner

Absent: Dana Emmerton

Also Attending: Shahnaz Shahidain: Village of New Glarus resident

1. **Call to Order:** Meeting was called to order by Chair Pulliam at 6:01 PM.
2. **Proof of Posting:** Chris Narveson, Town Chair, attested to proper proof of posting.
3. **Approve Minutes from August 16, 2023**
Motion to approve the minutes was made by Commissioner Pernitz; seconded by Commissioner Ruschman. Motion carried 7-0.
4. **Public Comments** – No public comments.
5. **Discuss and Possibly Consider Action to Request Town Board Permission to Transfer Money from Sinking Fund to Certificate of Deposit** – After brief discussion, action was deferred until the October meeting. The account balances for each Impact Fee is needed to decide and whether there is a penalty for early withdrawal if money is needed for the STH 39 trail that is to be relocated along State Highway 39.
6. **Continue 2024 Budget Discussion** – There was no discussion. Without objection, this item will be deferred until the October meeting.
7. **Update on the Town Proposal to the Wisconsin Department of Natural Resources to Transfer the Grant for a Trail along County Highway NN to State Highway 39** – Commissioners Pernitz and Narveson reported on a recent Zoom meeting with Wisconsin DOT and Wisconsin DNR representatives. WisDOT will not approve usage of the cattle underpass for the proposed trail but will allow an at-grade crossing of State Highway 39. With this agreement from the DOT, the DNR has approved the transfer of the grant funding from CTH NN to the Highway 39 trail. Vierbicher is currently working on plans and construction will take place in spring 2024. Alternate Commissioner Pertzborn discussed the possibility that University of Wisconsin graduate students could provide some planning expertise for the future Town park. Without objection, those possible concepts will be presented at the October meeting.
8. **Continue Discussion of Invasives on Soil Pile at New Town Park and of Cover Crop This Fall** – Commissioner Narveson reported that Town Patrolperson Ronald Roesslein will remove weeds from the soil pile at the STH 39 site. Once the current crops are harvested this fall, Elliott Jacob Buol, the farmer who currently leases a portion of the property, will plant winter wheat, in exchange for a reduced lease rate, as a cover crop. In June or July of 2024, after the winter wheat is harvested, Narveson recommends we plant this area with DOT prairie mix. The cost would be about \$500 per acre.
9. **Discuss Update on Green County Leaders Project Proposal** – Ms. Shahidain reported that projects will be selected at the September 27, 2023 meeting of the Green County Leaders. Ms. Shahidain will present her orchard project at that time.
10. **Discuss Hunting and Trapping Policy and Signage to Recommend to the Town Board** – There was a brief discussion on the topic.

After discussion, motion by Commissioner Pernitz, second by Commissioner Neton to recommend to the Town Board that hunting and trapping at the Town Park be by permit only and that Matt Stelter be permitted to hunt this season. Motion carried 7-0.

11. **Discuss Progress on Establishment of Friends Group for Town Park – Rose, Jason, Mona Sue, Kelly** – There was no discussion. Without objection, this item will be deferred until the January, 2024 meeting. Neton will talk to the Town Clerk about developing an email list of Town residents to publicize various topics. Narveson suggested that we request Town residents to supply the clerk with their email addresses when the annual garbage collection calendar is distributed.
12. **Town Board Action to Appoint Rose Pertzborn as Alternate to Park Commission** – No discussion.
13. **Continued Discussion of Name for Park** – There was no discussion. Without objection, this item will be deferred until the January, 2024 meeting.
14. **Report on Seed Collection Workshop Held on September 9, 2023** – There was good turnout at the workshop, with 10-12 people attending. The Bluebird Ridge Prairie is looking good. Some lead plants were observed which are an indicator of a healthy prairie.
15. **Discuss Need for Burn and Work on Invasives at BBRC** – Chair Pulliam suggested getting an estimate to remove invasive species. Narveson suggested we paint the areas with invasives to be removed and the Town Patrolperson can do this with the mini excavator.
16. **Plan Fall Workshops and Events**
 - a. Fall eCycle event (Saturday, October 14, 2023) – Commissioners Ruschmann, Narveson, and French will be able to attend and assist Monroe e-Waste.
 - b. Invasives Removal Workshop (Saturday, October 28, 2023) – Commissioner French volunteered the use of their UTV which will be transported to the site by trailer. Commissioner Ruschman will contact Matt Belnap at the high school to see if students wish to participate to fulfill their service hours.
 - c. Walk the Park with local supporters – Without objection, members of the New Glarus Town Board/Village Board, Village Park Commission, Town Plan Commission, and Boy Scout and Girl Scout troop leaders should be invited to walk the site at 1:00 PM on November 4, 2023. The Clerk-Treasurer will distribute the email invitations.
17. **Plan Outreach to Community**
 - a. Recommendations for 2024 workshops – Bow Hunting with Ian Munnoch and ~ Matt Stelter? – Without objection, this item will be deferred to the October meeting agenda.
 - b. Scouts, 4-H, High School students – Without objection, this item will be deferred to the October meeting agenda.
18. **Schedule Next Meeting** – The next meeting will be held on Wednesday, October 18, 2023 at 6:00 PM.
19. **Adjourn: Motion to adjourn by Commissioner Pernitz; seconded by Commissioner French at 7:37 PM. Motion carried.**

Approved:

Transcribed from notes taken by Commissioner Narveson and
Commissioner Pernitz

TOWN OF NEW GLARUS
PLAN COMMISSION MEETING
THURSDAY, SEPTEMBER 21, 2023
MINUTES

Members Attending: Chris Narveson: Chair; John Ott, John Freitag, Reg Reis, Craig Galhouse (virtually) Mark Pernitz, and Robert Elkins

Absent: None

Also Attending: John Wright (virtually): Clerk-Treasurer and Tim Schleeper (virtually at 6:05 PM): contract planner from Vierbicher

1. **Call to Order and Proof of Posting:** Chair Narveson called the meeting to order at 6:00 PM. Clerk-Treasurer Wright attested to proper proof of posting.
2. **Approve Minutes:** Motion to approve the meeting minutes from August 17, 2023, as presented, was made by Commissioner Ott; seconded by Commissioner Pernitz. Motion carried 7-0.
3. **Continue to Discuss Concept Plan for 3-Lot Cluster Development and Re-Plat of Lot 1 of Certified Survey Map 2449 off of Kempfer Lane for Land Owned by Alice Bertelrud** – Chair Narveson reported that he has not received any updates from the property owner, the surveyor, or her legal counsel. A double chip seal has been applied to Kempfer Lane. There followed a brief discussion about what responsibility the Town has for single-purpose roads and what developer responsibilities should be and when certain conditions should be met if there is further residential development.
4. **Inquiries Received by Town Staff:**
 - a. Development potential for property owned by Kristine Vike-Steinich – Clerk-Treasurer Wright provided a report regarding the development of the 96.50 contiguous acres owned by Gerald Torgeson at the date of ordinance. In 2002, Torgeson recorded a 3-Lot land division by CSM 3452, that included a portion of Lot 3 of CSM 1776. Around 2004, Torgeson sold 91.50 acres to the Klossner family, that included an existing house and shed. This house was considered a large lot division and diminished the development potential by 35 acres. The Town agreed to a proposed Conditional Use Permit for the Klossner family to operate a horse boarding and training facility and riding arena in 2004; this was issued by Green County. It is unclear whether this should have been considered as a commercial use of the property, which would consume a large lot per Chapter 110. In 2012, the Hutchinson family built a residence on the south end of Lot 3 of CSM 3452; it is unclear whether the construction of this home consumed the available, pre-ordinance building site on Lot 3 of CSM 1776, or whether it should be counted as a 30.0 acre open space deed restriction that encumbered the Klossner property (Lot 3 of CSM 3452 contains 5.0 acres of the land that was contiguous at date of ordinance). The Klossner family sold Lot 1 of CSM 3452 to the Anderson family who built a new home and detached studio this year. This resulted in a large lot split that encumbered Lot 2 of CSM 3452 with a 10.77 acre open space deficit. Wright stated he is seeking guidance on how to treat the CUP, the existing home, the residence built by the Hutchinson family, and the residence built by the Anderson family.

One option that was discussed was to refer this history to the Technical Review Committee if the land owner requests a determination. Those costs would be passed along to the property owner. Another option that was considered was to treat the expansion of Lot 3 of CSM 1776 by 5.0 acres when it became Lot 3 of CSM 3452 as a neighbor exchange. This may have allowed the pre-ordinance building site to be used post-ordinance for a residence and not result in an open space encumbrance. Lastly, if the current property owners add a new residence to the horse stable and relinquish the

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Conditional Use Permit, then there may the exist the option to cluster the property in order to sell the existing house, build a new house, and define at least one additional building site. Without objection, Wright will check to see if the CUP was transferred.

- b. Driveways within deed-restricted open space question from Attorney Duxstad – Clerk-Treasurer Wright briefly reviewed his email response to Attorney Duxstad on August 29, 2023. The specific location of a possible driveway through open space to provide access to a future residence was not shared in the inquiry.
5. **Review Sample Driveway Ordinances that Have Provisions for Field Drive Access and Farm Drive/Commercial Access** -- Sample ordinances were shared from the Town of Verona in Dane County, the Town of Berry in Dane County, and Town of Vermont in Dane County. There was a general discussion regarding the general need to avoid damage to the edge of public roads that can be the result of implements of husbandry accessing fields. It was noted that Green County issues permits for field road access. Planner Schleeper recommended that the Town Board consider permitting all existing field access drives gratis and charge a fee for all new ones. This would allow the Town to have known points of contact in the event there is damage. Commissioner Galhouse had reviewed other local ordinances as well. There was a brief discussion of farm lanes that are rarely built to Town road standards. Without objection, the item will be added to the October agenda for further discussion.
6. **Update on Possible Transfer of Proposed Trail Along CTH NN to STH 39 Between Town Land and Durst Road** – Chair Narveson reported that the existing cattle pass was rejected by the Wisconsin DOT. The proposed trail will cross State Highway 39 further to the east of the entry to the Town Park. The trail must be completed in 2024 to received matching funds from the Wisconsin Department of Natural Resources. Winter wheat will be planted as a cover crop once the current crops are harvested this year. The Plan Commission members will be invited to walk the property on November 4, 2023 with members of the Town and Village boards, Village Plan Commission, and Town/Village Park Commission members.
7. **Continue to Discuss Town Process for Development Potential Questions** – No discussion.
8. **Adjourn**
Motion to adjourn by Commissioner Ott; seconded by Commissioner Pernitz. Motion carried 7-0 at 7:28 PM.

Approved:

John Wright, Clerk-Treasurer