

**CITY OF PLYMOUTH, WISCONSIN
TUESDAY, FEBRUARY 28, 2023 COMMON COUNCIL MEETING
7:00 PM COUNCIL CHAMBERS, ROOM 302
128 SMITH ST. PLYMOUTH, WI 53073**

AGENDA

- 1. Call to order and roll call**
- 2. Pledge of Allegiance.**
- 3. Approval of the Consent Agenda (Alderspersons may request removal of item(s), or part thereof without debate or vote):**
 - A. Approve minutes of the meetings held Tuesday, February 14, 2023**
 - B. Approve City and Utility Reports:**
 - I. Electric, Water and Sewer Sales Report – January 2023**
 - II. Utility Related Write Offs for February - \$1,662.54**
 - C. Minutes acknowledged for filing – Finance and Personal: February 14 – Plymouth Television: January – Park Committee: February 13**
 - D. Approve Cigarette and Tobacco License for Green House Partner LLC at 105 E. Mill St.**
 - E. Approve Application for Event: Plymouth Maple Festival – to be held April 1, 2023 from 10 AM – 2 PM. Request Park Shelter Fee be waived.**
 - F. Utility Account Specialist-Project Lead Job Description and Salary Range**
- 4. Audience Comments: Citizens comments must be recognized by the mayor or presiding officer and are limited to three minutes per person from those signed in on the registration sheet located at the back of the Council Chambers prior to the start of the meeting.**
- 5. Items removed from Consent Agenda:**
- 6. New Business:**
 - A. Library Presentation – Library Director, Leslie Jochman**
 - B. Adoption of State of Wisconsin Municipal Records Retention Policy and updating legal record custodians – City Administrator/Utilities Manager, Tim Blakeslee**
 - C. Purchase of F-150 Truck for Water Utility, F-150 Truck for Electric Utility, and F-350 Truck Electric Utility. – City Administrator/Utilities Manager, Tim Blakeslee**
- 7. Resolution**
 - A. Resolution No. 4 – Supporting the use of ARPA fund for Fiber Optic Expansion and Upgrade of Railroad Crossings – City Administrator/Utilities Manager, Tim Blakeslee**

8. Entertain a motion to go into closed session for the following:

Pursuant to Wis. Stat. 19.85 (1)(c) considering employments, promotion, compensation or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility regarding the Police Chief

AND

Pursuant to Wis. Stat. 19.85 (1) (g) conferring with legal counsel for the government body who is rendering oral or written advice concerning strategy to be adopted by the body with respect to litigation in which it is or is likely to become involved regarding a claim from Tyrone Arneson

AND

Pursuant to Wis. Stat. 19.85 (1) (e) deliberating or negotiating the purchasing of public properties, the investing of public funds or conducting other specified public business, whenever competitive or bargaining reasons require a closed session – purchase of 133 E Mill Street.

9. Entertain a motion to go into open session

10. Discussion and possible action on closed session item

11. Adjourn to 7:00 PM on Tuesday, March 14, 2023

It is likely a quorum of members of other governmental bodies of the municipality may be in attendance at the above stated meeting to gather information. No action will be taken by any governmental body at the above stated meeting other than the governmental body specifically referred to above in this notice.

Please note that, upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids and services. For additional information or to request this service, please contact the City of Plymouth ADA Coordinator Leah Federwisch, located in the Plymouth Utilities office at 900 County Road PP, Plymouth, WI or call 920-893-3853.

**CITY OF PLYMOUTH, WISCONSIN
TUESDAY, FEBRUARY 14, 2023 COMMON COUNCIL MEETING
128 SMITH ST. PLYMOUTH, WI 53073**

UNOFFICIAL MEETING MINUTES

1. **Call to order and roll call:** Mayor Don Pohlman called the meeting to order at 7:00 PM. On call of the roll, the following Alderpersons were present: Charles Hansen, Diane Gilson, Greg Hildebrand, Bob Schilsky, Amy Odekirk, Mike Penkwitz, Angie Matzdorf and John Nelson. Also present were: City Administrator/Utilities Manager Tim Blakeslee, City Attorney Crystal Fieber, Director of Public Works Cathy Austin, Fire Chief Ryan Pafford and City Clerk / Deputy Treasurer Anna Voigt.

2. **Pledge of Allegiance.**
 - A. **Approval of the Consent Agenda (Alderpersons may request removal of item(s), or part thereof without debate or vote):** Motion was made by Nelson/Hansen to approve the consent agenda with a change to the minutes. Upon the call of the roll, all voted aye. Motion carried. Mayor Pohlman let various audience members speak about their events.
 - B. **Approve minutes of the meetings held Tuesday, January 24, 2023**
 - C. **Approve City and Utility Reports:**
 - I. **List of City & Utility Vouchers dated 01/01/23 -01/31/23**
 - D. **Minutes acknowledged for filing – Finance and Personal: January 24 –Police and Fire Commission: January 17– Plan Commission: February 2**
 - E. **Building Report for January 2023 – 19 permits at \$764,576.00**
 - F. **Approve 6 Temporary Class “B” Beer licenses for St. John the Baptist Congregation, 115 Plymouth Street, for Fish Fry’s to be held in their Church Hall on February 24, March 3, 10, 17, 24 and 31, 2023 from 4:00 PM – 6:30 PM. Underage persons are requested to be allowed on the premise.**
 - G. **Approve Cigarette and Tobacco License for Luxury Smoke LLC at 2617 Eastern Ave.**
 - H. **Approve Application for Event: Plymouth Chamber of Commerce – Cheese Capital Festival, to be held June 24, 2023 from 8AM – 10 PM. Request Park Shelter Fee be waived.**
 - I. **Approve Application for Event: Plymouth Chamber of Commerce – Mill Street Festival, to be held July 8, 2023 from 8AM – 5PM. Request Park Shelter Fee be waived.**
 - J. **Approve Application for Event: Plymouth Chamber of Commerce – Cheese Capital Wine Walk, to be held August 18, 2023 from 4PM – 7:30 PM. Request Park Shelter Fee be waived.**
 - K. **Approve Application for Event: Plymouth Chamber of Commerce – Pumpkin Walk, to be held October 27, 2023 from 4PM – 9PM. Request Park Shelter Fee be waived.**
 - L. **Approve Application for Event: Plymouth Chamber of Commerce – Holiday Parade, to be held November 24, 2023 from 6PM – 8PM**
 - M. **Approve Temporary Change of Premise for 52 Stafford to include the parking lot owned by the American Legion on February 18, 2023 expiring February 19, 2023**

3. **Audience Comments:** Citizens comments must be recognized by the mayor or presiding officer and are limited to three minutes per person from those signed in on the registration sheet located at the back of the Council Chambers prior to the start

of the meeting: Joy Hearth, the owner of a downtown pet grooming business, spoke about a parking spot outside her business. She would like to have a permanent spot-on Mill Street for her customers. Judge Natasha Torri is running for Sheboygan County Circuit Court / District 2. Natasha spoke about herself and her concerns she has seen while she served as the municipal court judge in City of Sheboygan and Village of Kohler.

4. Items removed from Consent Agenda: None

5. Proclamation:

A. National Future Business Leaders of America week February 5-11, 2023: Mayor Pohlman presented the Proclamation to Todd Williams and students. Williams explained that their FBLA Chapter is currently working on a National Recognition Program called Champion Chapter. The program is divided into five sessions throughout the school year with twelve tasks to complete for each session. One of the tasks that they have been charged with is "Ask an elected official to sign an FBLA Week Proclamation." Motion was made by Hildebrand/Gilson to approve the Proclamation. A unanimous aye vote was cast. Motion carried.

6. New Business:

A. Appointment of Mike Penkwitz to Finance Committee – Mayor appointed Mike Penkwitz to Finance Committee. A motion was made by Hildebrand/Odekirk to approve the appointment. Upon the call of the roll, all voted aye. Motion carried.

B. Appointments to Ad-Hoc Affordable Housing Committee – Blakeslee explained that in November of 2022 the Council adopted a resolution creating an Ad-Hoc Affordable Housing Committee. Per the resolution, the committee is to be made up of; Donald Pohlman (Mayor), John Nelson (Aldersperson), Greg Hidebrand (Aldersperson), Jeremy Schellin (Plan Commission), Brian Doudna (SCEDC), Derrick Hermann (Business Representative), Kristine Hartmann (Business Representative) and Tim Blakeslee (City Administrator/Non-voting). Motion was made by Hansen/Matzdorf to approve everyone listed to the Ad-Hoc Affordable Housing Committee. Upon the call of the roll, all voted aye. Motion carried.

C. 2022 Fire Department Year in Review / Firefighter Commendation - Fire Chief Pafford went over the 2022 annual report for the Plymouth Fire and Rescue. The Plymouth Fire and Rescue responded to 330 calls to service, of the 330 calls 159 were emergency medical calls. The Plymouth Fire and Rescue is staffed by 39 personnel with 30 of those trained in emergency medical services. Over the past year those members completed over 5,000 hours of training. Pafford introduced Assistant Chief Mike Birschbach, Captain Zach Rick, Captain Justin Vorpapel and Firefighter Brian Freund to recognize them for their instruction during a survival training.

D. Approve Agreement with Mead & Hunt Inc. to assist with the WWTP Digester Roof bidding and construction process – Director of Public Works Austin explained that the entire cover will need to be replaced on the primary digester. Funds for this project are not budgeted and will come from Wastewater Treatment Plant reserves. Austin indicated due to the emergency nature of this work; Administrator Blakeslee has preauthorized Mead & Hunt to begin their work. Motion was made by Hildebrand/Odekirk to approve the professional service agreement with Mead & Hunt Inc. in the amount not to exceed \$27,510. Upon the call of the roll, all voted aye. Motion carried.

7. **Entertain a motion to go into closed session for the following:** Motion was made by Nelson/Hansen to go into closed session. Upon the call of the roll, all voted aye. Motion carried.
Pursuant to Wis. Stat. 19.85 (1)(c) considering employments, promotion, compensation or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility regarding City Administrator / Utilities Manager
8. **Entertain a motion to go into open session:** Motion was made by Gilson/Odekirk to go into open session. Upon the call of the roll, all voted aye. Motion carried.
9. **Discussion and possible action on closed session item:** None
10. **Adjourn to 7:00 PM on Tuesday, February 28, 2023:** Motion was made by Odekirk/Hansen to adjourn the meeting. A unanimous aye vote was. Motion carried.

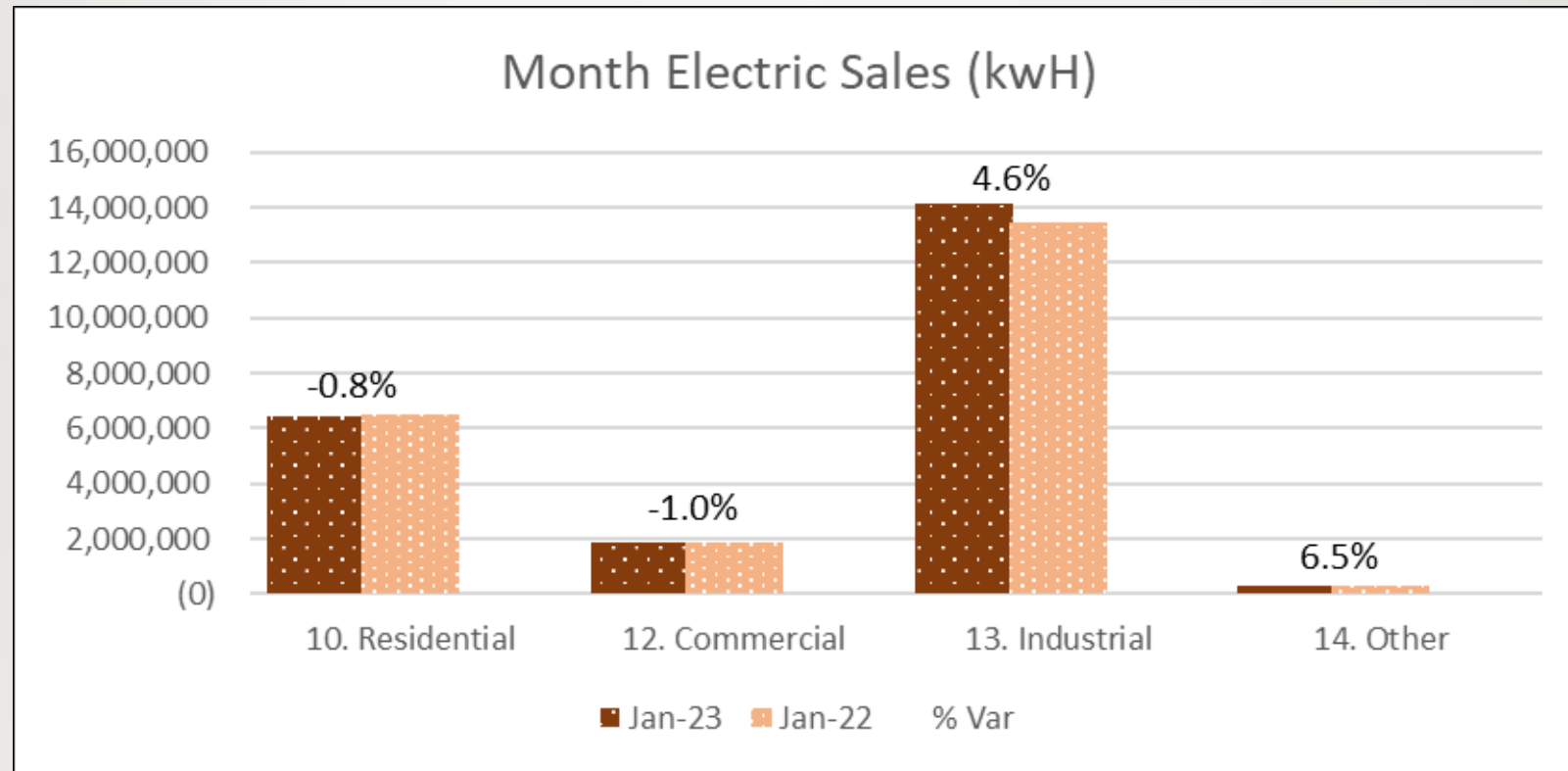


Plymouth Utilities

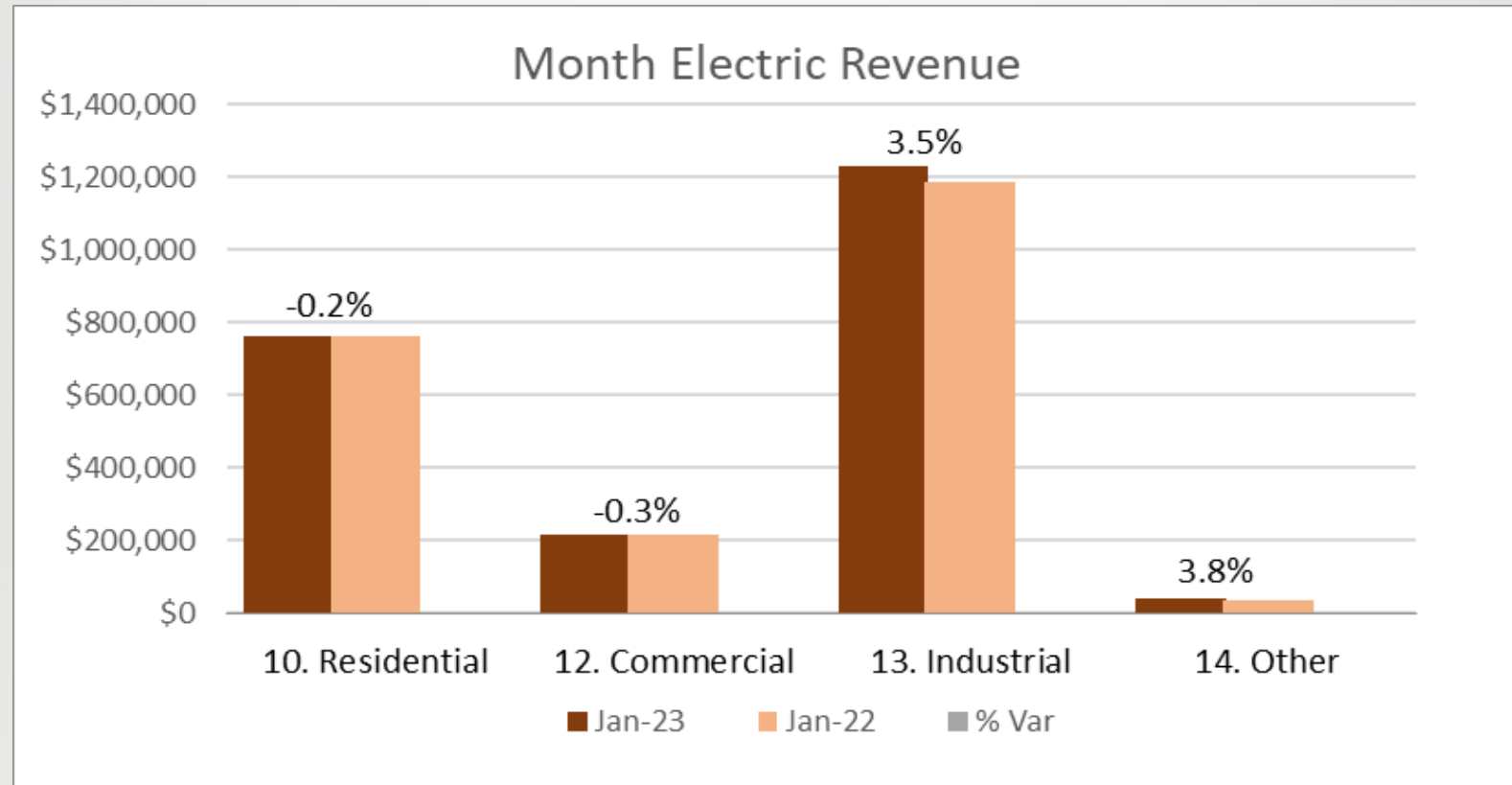
JANUARY 2023

SALES & REVENUE

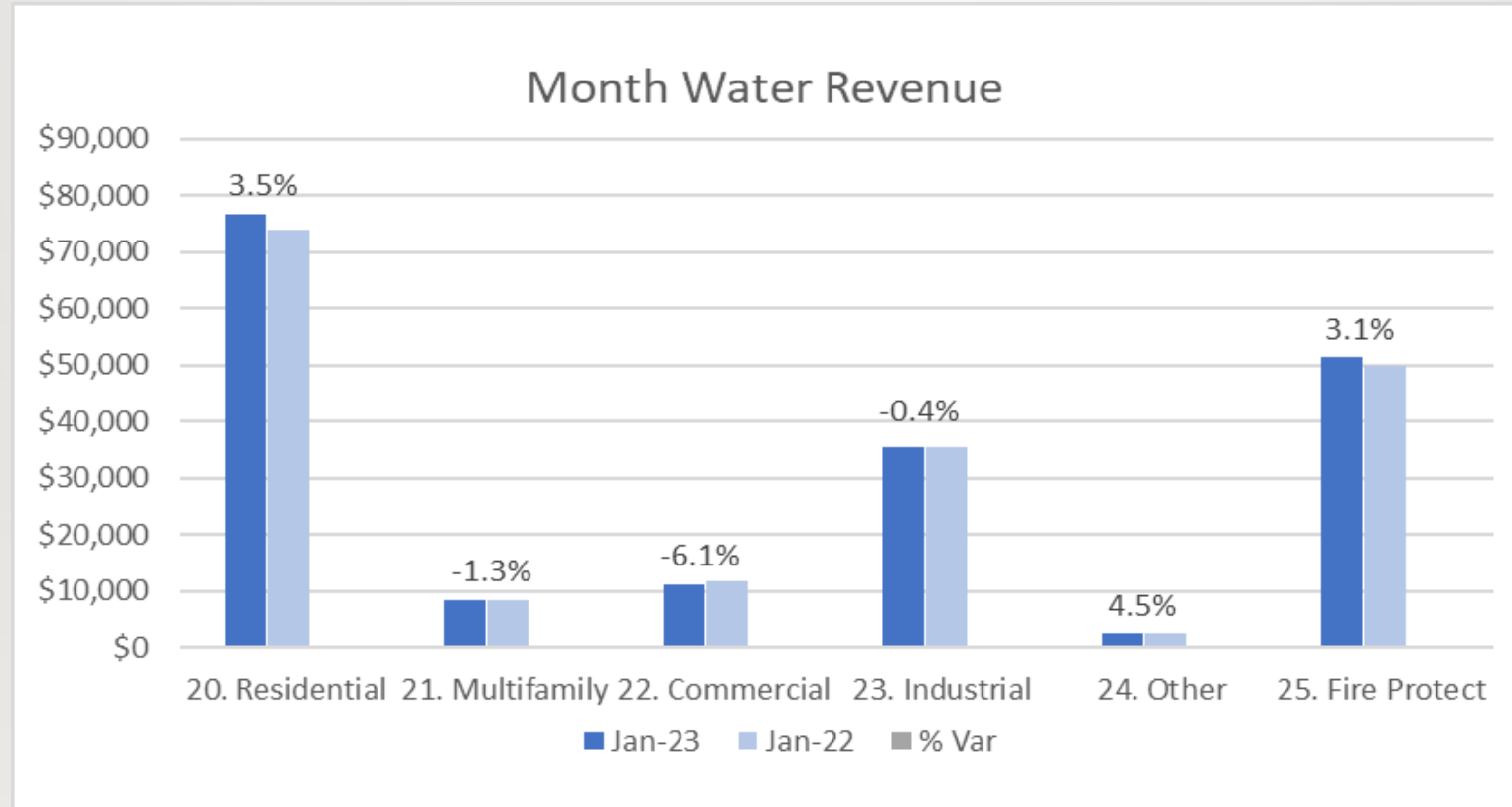
January 2023 Electric Sales



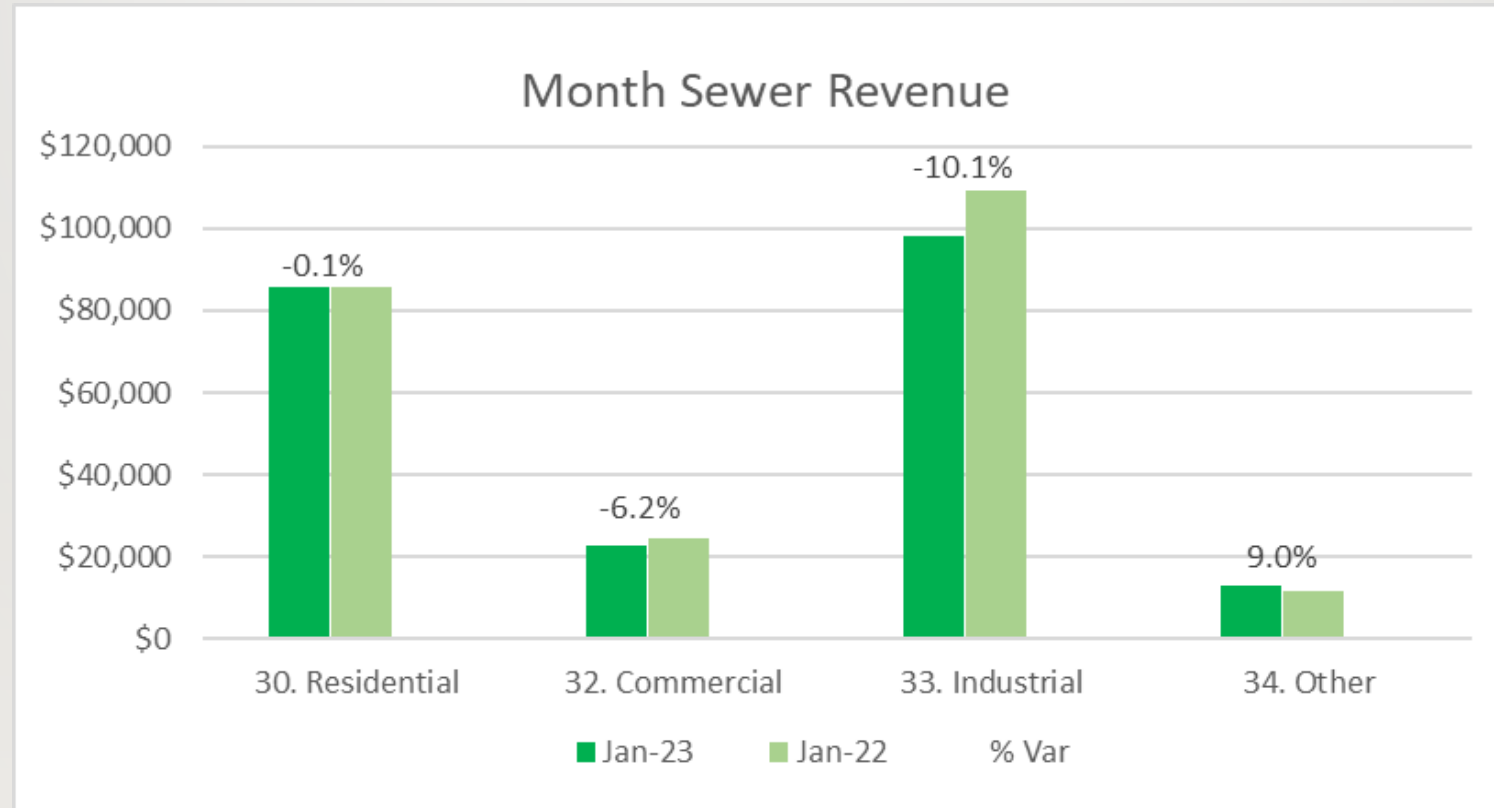
January 2023 Electric Revenue

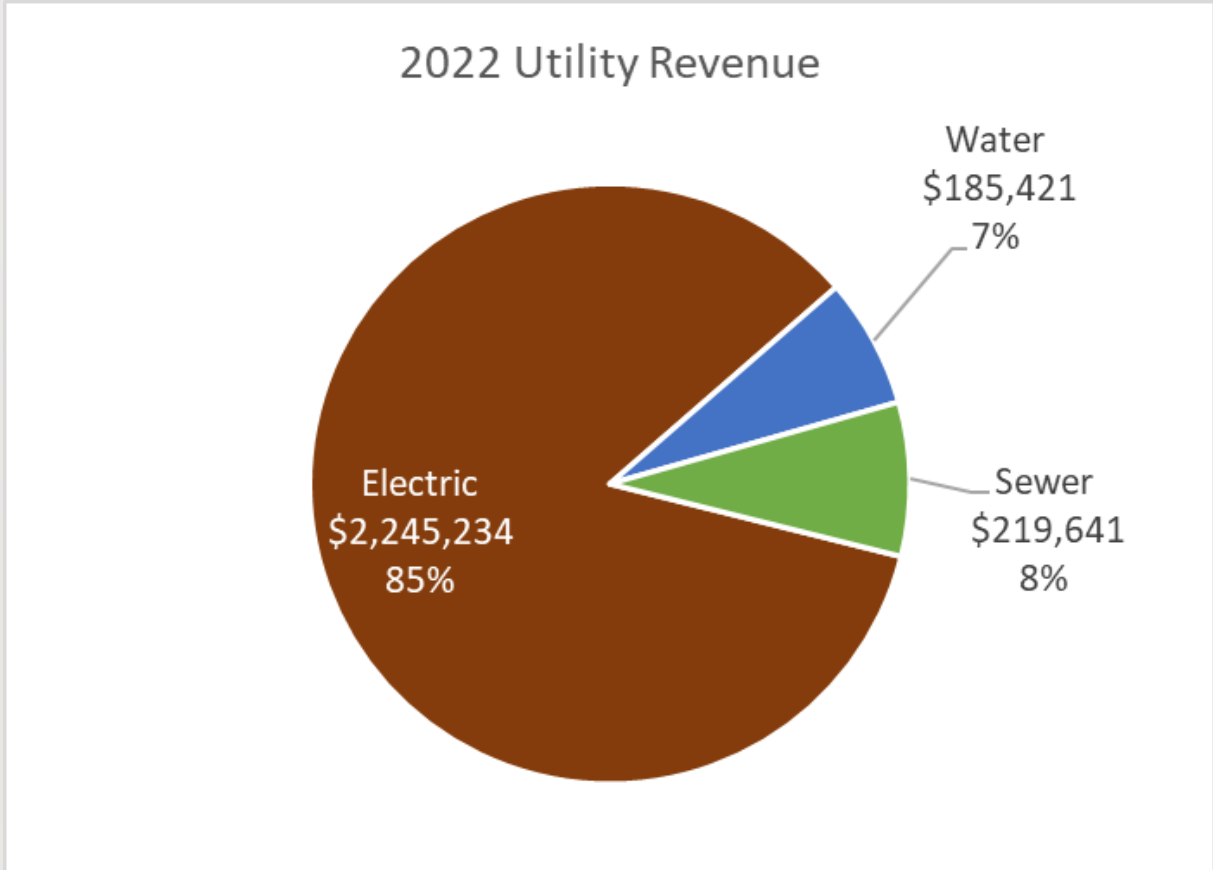


January 2023 Water Revenue



January 2023 Sewer Revenue





Report Criteria:

Selected types: Write Off

Name	Customer Number	Type	Reference Number	Description	Source ID	Check Number	Amount	Msg	Service
Write Off									
02/17/2023									
SIMPSON, CHAD	6.88.71210.12	Write	5	WRITE-OFF SDC			478.21-	M	Multiple
SULLIVAN, CHRISTOPHER	10.87.30152.29	Write	6	WRITE-OFF SDC			150.75-	M	Multiple
LORENS, TRACY	11.87.20559.13	Write	3	WRITE-OFF SDC			53.94-	M	Multiple
CARY, DAVID	14.87.25441.03	Write	1	WRITE-OFF SDC			175.14-	M	Multiple
DIMAS, EVANGELINA	16.88.35159.23	Write	2	WRITE-OFF SDC			221.72-	M	Multiple
MYRICK, PAMELA	16.88.36452.15	Write	4	WRITE-OFF SDC			582.78-	M	Multiple
Total 02/17/2023:							<u>1,662.54-</u>		
Total Write Off:							<u>1,662.54-</u>		
Grand Totals:							<u>1,662.54-</u>		

**UNOFFICIAL MINUTES
FINANCE & PERSONNEL COMMITTEE OF THE
PLYMOUTH COMMON COUNCIL
TUESDAY FEBRUARY 14, 2023**

1. **Call to order and roll call:** Finance & Personnel Committee Chair Nelson called the meeting to order at 6:45 PM. On call of the roll, the following members were present: Mayor Donald Pohlman, John Nelson, Greg Hildebrand, and Amy Odekirk. Alder. Diane Gilson, Alder. Charlie Hansen, Alder. Mike Penkwitz, Alder. Angie Matzdorf, City Administrator/Utilities Manager Tim Blakeslee, and Director of Public Works Cathy Austin.
2. **Approval of meeting minutes for January 24, 2023 meeting:** Motion was made by Hildebrand/Odekirk to approve the minutes from January 24, 2023. A unanimous aye vote was cast. Motion carried.
3. **Discussion and possible recommendation to Common Council for the use of ARPA funds for Fiber Optic Expansion and Upgrade of Railroad Crossings –** City Administrator / Utility Manager Blakeslee explained the City of Plymouth received money from the American Rescue Plan Act funds. Funds need to be obligated before the end of 2024 and spent no later than 2026. Prior approved projects funded with ARPA include SCBA tanks for the Fire Department and Library air purification and laptops. A 2023 staff goal was to develop an ARPA project plan. Staff developed 2 priority projects. Priority 1 is fiber optic expansion to Well 11, Well 12 and the Sunset Lift Station. Priority 2 is to upgrade the railroad crossings at Highland Ave. and Pleasant View Rd. Nelson asked if the light would be gated. Austin said they will not put in lights anymore without gates. Pohlman stated that this would be a good use for the ARPA funds. Motion was made by Odekirk/Hildebrand. Upon the call of the roll, all voted aye. Motion carried.
4. **Adjournment:** Motion was made by Pohlman/Hildebrand to adjourn the meeting. A unanimous aye vote was cast. Motion carried.

**Plymouth Community Television
January 2023 Board Meeting**

Checking: 578.97
Unrestricted: 1,877.05
Restricted: 8,739.45

**There was no scheduled Board meeting
In the month of January 2023**

**Next scheduled Board meeting
Monday February 20th, 2023 5:15 PM
At the High School**

Respectfully submitted
Konrad Kaczowski

PLYMOUTH PARKS COMMITTEE AGENDA
CITY OF PLYMOUTH, WISCONSIN
February 13, 2023 6:30 PM
Plymouth City Hall Room 210
128 Smith Street
Plymouth, WI 53073

Meeting Minutes

1. **Call to order and roll call:** Chairman Melcher called the meeting to order at 6:30 PM. Member present were Mark Levandowski, Steve Stavola and Katie Schroeder.
2. **Approve agenda:** Motion was made by Schroeder/Levandowski to approve the agenda. A unanimous aye vote was cast. Motion carried.
3. **Approval of October 10, 2022 minutes:** Motion was made by Stavola/Schroeder to approve the minutes. A unanimous aye vote was cast. Motion carried.
4. **Audience:** None
5. **Final report on Aquatic Center:** Austin informed the committee that the Aquatic Center had a good season. There has been an increase in wages for the lifeguards.
6. **Preparation for Summer activities – Golf Course (fees):** Austin reviewed the proposed golf course fees. Motion was made by Levandowski/Schroeder to reduce the proposed student fee from \$150 to \$140. A unanimous aye vote was cast. Motion carried. Motion was made by Stavola/Schroeder to approve the updated golf course fees with the change to student fee. A unanimous aye vote was cast.
7. **PYAA/Lions Club update at Lions Park:** Melcher updated the committee on a potential siding on the grandstand that needs to be replaced at Lions Park. PYAA has showed interest in replacing it. Austin asked what the timeframe would be. Melcher answered PYAA would like to do it in 2024.
8. **Set May Park Visitation:** The annual parks visit will be held on May 15, 2023 at 5:30 PM. Austin suggested visiting Lions Park and the Golf Course for park visitations. Melcher mention also looking at Lone Oak if there was time.
9. **Budget proposals for 2024:** Austin reviewed some changes for the proposed 2024 parks budget. She mentioned a lot of the budget depends on the Mullet River Dam.
10. **Communications – Letters, emails, or reports related to the Committee:** None
11. **Adjourn: Next meeting scheduled for Monday, May 15, 2023:** Motion was made by Levandowski/Stavola to adjourn. A unanimous aye vote was cast. Motion carried.

Minutes submitted by Anna Voigt

Application for Cigarette and Tobacco Products Retail License

Submit to municipal clerk.

MUNICIPAL USE ONLY

Applicant's Wisconsin 15-digit Sales Tax Account Number
 456-1030370438-04

← This must be issued in the same Legal Name of the licensee below.

License Number
Period Covered
Date of Issuance

Legal Name (corporation, limited liability company, partnership or sole proprietorship) Green House Partner LLC		Federal Employer Identification No. (FEIN) 84-1889733
Trade or Business Name (if different than Legal Name)		Telephone Number (414) 202-0700
Business Address (License Location) 105 E. Mill ST.	Business Located In <input checked="" type="checkbox"/> City <input type="checkbox"/> Village <input type="checkbox"/> Town	Business Telephone ()
Municipality Plymouth	State WI	County
Zip Code 53073	of: Plymouth	
Mailing Address (if different than Business Address)	Municipality	State Zip Code

Organization (check one)

- Sole Proprietor
 Wisconsin Corporation – Enter date incorporated: _____
 Partnership
 Out-of-State Corporation – Are you registered to do business in Wisconsin? Yes No
 Other (describe) _____

- Yes No 1. Does the applicant understand that they must purchase cigarettes only from distributors or jobbers who hold a permit with the Wisconsin Department of Revenue?
 Yes No 2. Does the applicant understand that they must obtain a Tobacco Products Distributor permit if purchasing untaxed tobacco products from an out-of-state company? (Tobacco Products Distributor permit is available from the Wisconsin Department of Revenue at 608-266-6701. See application form CTP-129, revenue.wi.gov/forms/excise/ctp-129.pdf.)
 Yes No 3. Does the applicant understand that they cannot purchase/exchange cigarettes or tobacco products from another retailer, including transferring existing stock to a new owner?
 Yes No 4. Does the applicant understand that they must provide employees with tobacco sales training approved by the Wisconsin Department of Health Services? (<https://witobaccocheck.org>)
 Yes No 5. Does the applicant understand that they may not sell, give or otherwise provide cigarettes/tobacco products and nicotine products to minors (including electronic cigarettes containing nicotine)?
 Yes No 6. Does the applicant understand that they may not sell single cigarettes?
 Yes No 7. Does the applicant understand that cigarette and tobacco products invoices must be kept on the licensed premises for two years from the date of the invoice and be available for inspection by the Wisconsin Department of Revenue/law enforcement and that failure to comply can result in criminal penalties, including loss of cigarettes/tobacco products?
 Yes No 8. Does the applicant understand that only cigarettes and roll-your-own (RYO) tobacco products listed on the Wisconsin Department of Justice's website labeled "Directory of Certified Tobacco Manufacturers and Brands" at www.doj.state.wi.us/dls/tobacco-directory may be sold in Wisconsin?

Cigarettes / Tobacco will be sold over counter through vending machine both

READ CAREFULLY BEFORE SIGNING: Under penalty provided by law, the applicant states that each of the above questions has been truthfully answered to the best of the knowledge of the applicant. Applicant agrees to operate this business according to law and that the rights and responsibilities conferred by the license(s), if granted, cannot be assigned to another.

Any lack of access to any portion of a licensed premises during inspection will be deemed a refusal to permit inspection. Such refusal is a misdemeanor and grounds for revocation of this license. Any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000.


 (Officer of Corporation / Member / Manager of Limited Liability Company / Partner / Individual)

Fee - \$100.00 per year
 (July 1 to June 30)
 Date Paid 2/20/23

Receipt No. 6.003906



February 16, 2023

Mayor Don Pohlman and
Plymouth Common Council
128 Smith Street
Plymouth, WI 53073

RE: Maple Festival

Dear Mayor and Council Members:

The organizers of the Second annual Plymouth Festival request a waiver to the park fees for our event on April 1, 2023.

Our event serves the purpose of demonstrating the production of maple syrup from local forests and to celebrate the coming of spring. The event is family oriented bringing together local residents and tourists in a carnival type environment. It will entail a variety of demonstrations (syrup making and chain saw carving), a pancake breakfast, vendors, and games for all ages. Our attendance goal is between 500 to 1,000 people.

Funds raised will be given back to the community.

We thank you for your consideration of our request to wave park fees for this event.

Sincerely,

John Nelson
Festival Co-Chair
Plymouth Maple Festival
711 Torke Terrace
Plymouth, WI 53073
(920) 980-2539



Application for Event

City of Plymouth
128 Smith Street
P.O. Box 107
Plymouth, WI 53073

Applicant Name John Nelson, Nelson Services, LLC Phone Number (920) 980-2539

Address 711 Torke Terr. City Plymouth, WI Zip 53073

Are you a 501 (C-3) non-profit organization? No Yes Tax Exempt # _____

I have included my organization's proof of insurance with this form.
 I am exempt from requiring proof of insurance because _____

Authorized Agent _____ Home Phone _____
Bus. Phone _____

Address _____ City _____ Zip _____

Point of contact at Event (if different than Agent) _____

- Type of Event:** (Check all appropriate blocks) Public Private
- Athletic Activity (tournament, sports event)
 - Block Party
 - Financial Gain Event (map required)
 - Community/Park Event
 - Parade/Street Closing (map required)
 - Runs/Walks (map required)
 - Business/Organization Event
 - Other _____

Event Date(s): 4/1/23 Start/End Time: 10:00 am - 2:00 pm

Name of Activity Plymouth Maple Festival Purpose: Community celebration

Assembly Area City Park Dispersal Area: _____

Estimated Attendance 250 No. of Parade Units: _____

Location of Block Party _____
(Block off - street from - street to)

Check all appropriate boxes:

- | | | | | |
|-------------------------------------|-------------------------------------|-----------------------------|-------------------------------------|-------------------------------------|
| Yes | No | | Yes | No |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Admission/Entry Fee | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Financial Gain Activity | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Concession Sales | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Vendor Displays/Sale | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Electricity Needed | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Portable Toilets | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Street Closure | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Barricades Needed (_____) | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| | | Quantity | | |

- Fireworks
- Amusement Rides
- Setting Up Tents
- Amplification Equipment
- Musical Bands
- Horses/Animals
- Snowmobiles/ATV's
- Beer Sales*
*Requires Special Permit

The applicant named on this application will be responsible for the conduct of the special event and for the condition of the facility. We will not deny anyone the benefits of, or otherwise subject anyone to discrimination because of race, color, creed, national origin, handicap or religion.

The applicant individually, or the authorized agent on behalf of applicant, being of sound mind and body, do hereby freely, voluntarily and knowingly, now and for all times, fully save and hold harmless, the City of Plymouth and each and every of its elected, and appointed officials, employees, representatives, agents, heirs, and assigns, jointly and severally for and against any and all claims, causes of action, actions, liabilities, demand, losses, damages, and/or expenses of whatsoever kind and nature including counsel or attorney's fees, which I have or may, at any time, incur or sustain arising from, resulting from, incurred in consequence of, or pertaining to, any and all intentional and negligent acts, incidents, activities, and transactions, of whatever kind and nature, direct or indirect, of mine own and those of or by the City of Plymouth and each and every of its elected and appointed officials, employees, and agents, regardless of when and where, occurring or arising from this event.

The public event applicant shall submit a general liability insurance policy certificate in the amount of \$1 million dollars naming the City of Plymouth as an additional insured party. The applicant for this public event must be 18 years of age. Any misrepresentation of public events described in this application occurring in City of Plymouth parks or facilities will be just cause for future denial of rental agreements with the City of Plymouth.

Date 2/16/23 Signature John Nelson
(Must be Applicant or Duly Authorized Agent) 06/18



City of Plymouth Parks & Youth Center Rental Agreement

These facilities are rented on a First Come – First Serve basis.

Rental of Park Facilities for the current year will begin on the first Monday in February of that year.

Application Date 2/16/23 Date of Rental 4/1/23
 Park City Park Facility Band Shell, Cake Stand, & lower shelter
 Purpose of Rental Maple Festival
 Approximate # of people attending 750 Time Rented From: 7:00 am To: 4:00 pm

ENTRY INTO THE RENTED FACILITY GRANTED ON THE DAY(S) OF RENTAL ONLY.

Applicant Name/Responsible Party John Nelson, Nelson Services, LLC
 Address 711 Torke Terr. City _____
 Home Phone # 920 980-2539 Work Phone # —
 Email nelson.john.e@gmail.com

You **must** pay the entire rental fee at the time this application is made to reserve the facility.

Refunds will only be considered for cancellations within one week of the application date.

You must be at least 18 years of age to rent the City of Plymouth facilities.

FEE SCHEDULE FOR PARK FACILITIES:

- \$60.00 for City Residents
- \$120.00 for non-City Residents
- \$120.00 for City -based Organization
- \$240.00 for non-City based Organization

- \$50.00 Security Deposit (50 people & under)
- \$100.00 Security Deposit (51 people & over)

FEE SCALE FOR YOUTH CENTER:

- 0-5 Hour Rental - \$70.00 for City Residents
- Over 5 Hour Rental - \$140.00
- 0-5 Hour Rental - \$140 for non-City Residents
- Over 5 Hour Rental - \$280.00 for non-City Residents

- \$50.00 Security Deposit (50 people and under)
- \$100.00 Security Deposit (51 people & over)

ALL PARK FACILITIES ARE CLOSED BETWEEN 10:00 PM & 6:00 AM - YOUTH CENTER MUST BE VACATED BY 1:00 AM

SECURITY DEPOSITS ARE DUE AT TIME OF KEY PICK-UP

Please pick up your key and pay \$ _____ security deposit at the Clerk's Office by:

Time: _____ Date: _____

Fee Amount Paid: _____ Cash or check #: _____ Staff Initials: _____

FOR CONCERNS AFTER NORMAL CITY HALL HOURS – CONTACT THE PLYMOUTH POLICE AT 920-893-6541

● **PARKS AVAILABLE TO RENT:**

1. Band Shell: City Park / 203 Suhrke Road
2. Cake Stand: City Park / 203 Suhrke Road
3. Lower Shelter: City Park / 203 Suhrke Road
4. Rotary Park Shelter: 903 E. Clifford Street
5. Nutt Hill Shelter: 750 W. Main Street
6. Lone Oak Shelter: 2245 Valley Road
7. Stayer Park Band Shell: 39 S. Stafford Street
8. Youth Center: 609 North Street
9. Certain picnic areas at City Park are available to rent with no fee.

PARKS OPEN – FIRST WEEKEND IN MAY

MAY – WEEKEND RESERVATIONS ONLY – RESTROOMS OPEN 9:00 AM – 7:00 PM

MEMORIAL DAY TO 1ST FRIDAY AFTER LABOR DAY - WEEKDAYS AND WEEKENDS – RESTROOMS OPEN 9:00 AM – 9:00 PM

SEPTEMBER – WEEKEND RESERVATIONS ONLY – RESTROOMS OPEN 9:00 AM – 3:00 PM

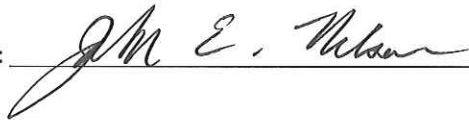
PARKS CLOSE – AFTER 3RD WEEK IN OCTOBER

- If a business/corporation/non-profit organization event is over 50 people, you must fill out an Application for Event Form, furnish proof of insurance liability coverage, and pay a \$100 security deposit.

In entering the agreement, I will uphold the following City of Plymouth policies and ordinances. Any violations will be just cause for the denial of future reservations in the City of Plymouth parks or facilities:

- To cancel this rental, please call City Hall, (920) 893-1271, 24 hours in advance between 7:30 am and 4:00 PM M-F
- Any person, organization, or corporation reserving any park area or facility in the City of Plymouth shall agree to assume full responsibility for all damage to City property and shall make full payment upon billing by the City Clerk.
- Renters must pick up keys by the last business day before their scheduled event and are responsible for the specified security deposit listed on page one. All rental areas shall be left in clean condition, with refuse placed in containers provided for such purpose. All tables and benches shall be returned to the proper location. The security deposit will be refunded after 10:00 am on the next business day when keys to the rental facility are turned in to the Clerk's Office and it is verified that the facility has been properly cleaned. Any clean up costs by the City will be billed at \$30.00 per hour and will be deducted from the security deposit.
- All accidents, incidents and misunderstanding must be referred to the City Clerk's Office within 48 hours.
- Any misrepresentations of events at facilities rented by this agreement will terminate the rental agreement and will be just cause for the denial of future reservation in the City of Plymouth Parks or Facilities.
- By signing this agreement Renter, the undersigned, agrees to indemnify and hold harmless the City of Plymouth, its agents and employees, from any and all claims and legal action for damage to personal property and/or personal injury that may be brought against the City of Plymouth as the result of his/her/ its use and rental of the above facility by any member of such organization or guest there of, and does further certify that he/she has full authority so to do.

Signature of Renter: _____



Upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids & services. For additional information or to request this service, contact City of Plymouth ADA Coordinator Leah Federwisch, located in the Plymouth Utilities office, 900 County Road PP, Plymouth, WI or call 920-893-3853

City of Plymouth
128 Smith St. - P.O. Box 107
Plymouth, WI 53073-0107



Telephone: (920) 893-3745
Facsimile: (920) 893-0183
Web Site: plymouthgov.com

DATE: February 22, 2023
TO: Mayor and Common Council
FROM: Tim Blakeslee, City Administrator/Utilities Manager
RE: Utility Account Specialist-Project Lead Job Description and Salary Range

Background: In late 2022, our Management Assistant resigned to take a new position. The Management Assistant role served as a lead for customer service at the Utility, but also completed miscellaneous tasks as assigned. Utility staff has taken several months to review the opening and recommends transitioning the Management Assistant position to a Utility Account Specialist-Project Lead position.

Upon review of the needs at the Utility, a position managing projects that support Utility administration with a focus improving process and efficiency would be beneficial as opposed to a customer service focused position. The Project Lead position would also be cross trained with the Utility Account Specialist-Billing Lead and Utility Account Specialist–Collection Lead to provide backup when either of those employees are out of the office. All three positions would provide customer service to Utility customers as needed. Staff recommends that this position fall in the Utility Account Specialist salary range as set by wage resolution.

Current - Management Assistant – \$18.85 to \$22.61

Proposed - Utility Account Specialist-Project Lead position - \$24.91 to \$27.84

Recommendation: Approve the Utility Account Specialist-Project Lead Job Description and Salary Range



Utility Account Specialist-Project Lead

Department:	Plymouth Utilities	FLSA Status:	Non-Exempt
Division:	Administrative	Job Status:	Non-Bargaining Unit
Reports to:	Finance Manager	Location:	Plymouth Utilities Operations Center
Prepared by:	Finance Manager	Approved by:	Plymouth Common Council
Date:	February 10, 2023	Date:	

GENERAL DESCRIPTION

Under the direction of the Finance Manager, the Utility Account Specialist is a member of a small team assisting Plymouth area residents and businesses with inquiries regarding electric, water, wastewater, stormwater, garbage and recycling services. This position performs a variety of administrative and accounting tasks, handling a variety of complex and varied billing and service issues, while ensuring customer satisfaction and regulatory compliance.

JOB FUNCTIONS

The following duties and responsibilities are not to be construed as exclusive or all-inclusive. Other duties and responsibilities may be assigned and required.

Essential Job Functions of a Utility Account Specialist:

- Assist customers in a professional, efficient, and friendly manner.
- Answer questions, investigate and resolve emerging problems, and respond to customer complaints; work to resolve customer concerns and escalate issues when appropriate.
- Establish and maintain accurate and confidential customer records, processes requests for the start, cancellation and/or change of service. Verify customer credit and deposit information.
- Document customer interactions in Utility Billing account notes. (complaints, resolutions, disconnections, payment plans, payment difficulties, etc.).
- Process a variety of customer payments and assist with daily deposit (night box, mail, PSN batches, ACH, and in-person payments).
- Prepare customer correspondence (budget billing letters, special letters, mailings, average usage inquiries, and billing adjustments).
- Review and explain utility bills to customers. Explain utility service standards and requirements to customers.
- Build and maintain positive working relationships with co-workers, other City/Utility employees, and the public using principles of good customer service.

Essential Job Functions of a Project Lead:

- Manage projects that support the Utility administration in redefining and improving process and efficiency using technology and cross-functional collaboration. Prioritize providing transparency and documentation to support regulatory compliance and increase customer satisfaction.
- Review and enhance the customer experience on the Utility website.
- Create Q&A, dialog, and scripts to aid in customer discussions.
- Create and Review Monthly Customer Service report to verify service and rates billed for new customers.
- Prepare for Billing by monitoring the Water Leaks, Water High Usage, VEE reports, and Budget Customer Last Payment reports.
- Annually review and update Budget Billing accounts.
- Maintain city-owned cemetery records. Answers questions related to cemetery, sells cemetery plots, and coordinates with DPW, funeral homes, and service providers.

- Support Utility staff by ordering office supplies and misc. items and assist with the US Cellular phone program.
- Update/Distribute the Customer Care Manual, On Call Answering Manual, phone lists, and Inventory of Critical Needs binder.
- Annually, assist the DPW Director with the DNR grant applications, reports, and the Tree City Application.
- Annually, track and maintain activity measures for the City/Utility budget, and assist with annual PSC reporting.

OTHER DUTIES

- Provide back up for other office staff.
- Perform all other duties as assigned.

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES

- Ability to communicate information, policies and procedures clearly, concisely and tactfully, both verbally and in writing.
- Must possess a high level of integrity and work ethic.
- Ability to actively listen to customers with empathy and patience to help resolve issues.
- Maintain accurate records; verify information; compile and reconcile numerical and financial data.
- Exercise independent judgment in applying appropriate policies and procedures.
- Effectively and simultaneously manage a variety of tasks and assignments; work effectively under the pressure of deadlines.
- Ability to read, analyze and interpret utility business information and regulations, and respond to questions from department heads, co-workers, and the general public.
- Ability to calculate figures and amounts such as discounts, interest, and percentages.
- Proficient in using Microsoft Office Suite (includes Word, Excel, and Outlook).
- Experience using GIS, CIVIC Connect, or other ERP system preferred.

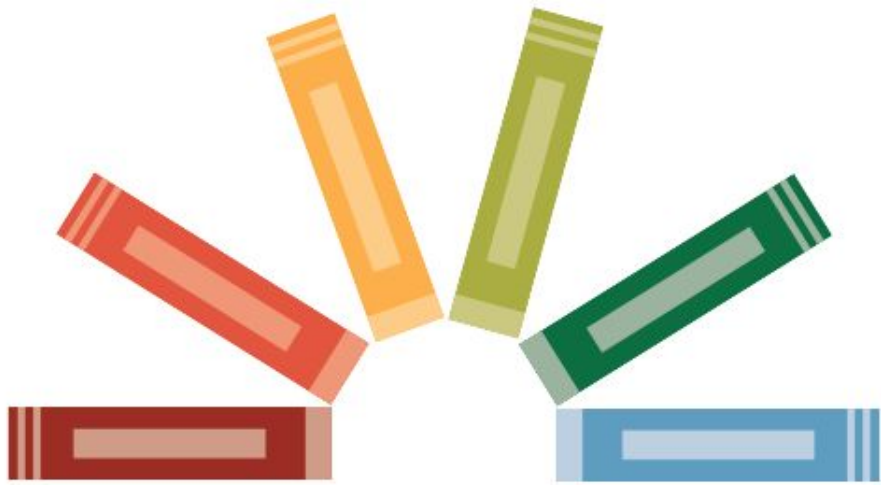
EDUCATION AND TRAINING

- Graduation from an accredited college, university, or technical school with an Associate's Degree.
- Two (2) to four (4) years related experience desired.
- In evaluating candidates for this position, the City may consider a combination of education, training, and experience which provides the necessary knowledge, skills and abilities to perform the duties of the position.
- Office experience which regularly requires the ability to communicate orally and in writing with a variety of people, as well as frequent interaction with the general public.
- Valid Wisconsin driver's License.

WORKING CONDITIONS

- Environment: Work is performed in a standard office setting; may require irregular work hours and may work from more than one location.
- Physical: Primary function require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to stoop, bend, kneel, crouch, reach, and twist; to lift (up to 50 lbs.), carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; to operate automobile; and to verbally communicate to exchange information.
- Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Disclaimer: The job description has been prepared to assist in evaluating various classes of responsibilities, skills, and working conditions. It indicates the kinds of tasks and levels of work difficulty required of the position. It is not intended as a complete list of specific duties and responsibilities. Nor is it intended to limit or modify the right of any supervisor to assign, direct, and control the work of employees under supervision. Nothing contained herein is intended or shall be construed to create or constitute a contract.



PLYMOUTH
Public Library

2022 A Year in Review

Your Community Hub

Our Library

What your Library Card can do for you!

What do you think of when you hear the word, Library?

Books?



Quiet Spaces?



More than just books

- Board Games
- Video Games
- Playaways
- STEAM Kits
- Parenting Packs
- Puzzle Exchange
- Digital Resources: eBooks, eAudiobooks, Digital Magazines, Streaming Video, Research Databases, and more!

Can't find it? We can request it!

- 30+ Libraries in Sheboygan, Ozaukee, Dodge, and Washington Counties
- 3 delivery routes that run 5 days a week
- 2.25 Million+ Items
- Can't find it in Monarch? - we have access to libraries across Wisconsin and Minnesota through special requests

How we choose library materials

- Library Staff use professional resources to seek materials on a broad range of subject matter that reflect diverse experiences and meet the needs and interests of our entire community
- We listen to community member suggestions
- We shelve material in an age-appropriate manner

Your home office

- Public Computers and wifi
 - Internet
 - Microsoft Office Products
- Printing
- Faxing
- Copying
- Scanning (free!)
- Technology help
- Tax Forms



Available for a small fee

Your Resource Finders

- Expert Information Finders
- Personalized Recommendations
- Referral Services

2022 By the Numbers

The Library by the numbers

	2021	2022	% Change
Circulation	74149	89865	21%
Digital Circulation	21894	23435	7%
Door Count	26921	45559	69%
New Library Cards	271	435	61%
WIFI	6708	8535	27%
Computer Use	1578	2868	82%

Looking to the Future

The Library's Strategic Plan

In 2022, Plymouth Public Library embarked on a strategic planning process for our library. A planning team was formed to gather feedback from a variety of stakeholders.

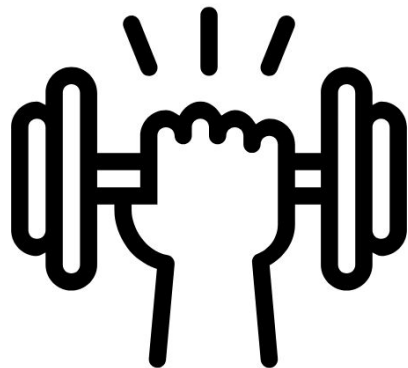


The planning team used this data to identify community needs and aspirations, which were developed into the goals and objectives of this strategic plan.

**Innovating
with our
Community**



**Activating
Community
Strengths**



**Getting the
Word Out**



**Finding
Organizational
Balance**



Action Items Starting in 2023

- Assess the Library Building and how we are using our space
- Find creative ways to offer more technology help
- Prioritize purchasing best sellers and popular items
- Provide or help the community create and support a central place for volunteers to discover and sign up for volunteering opportunities in Plymouth
- Host regular Library Open Houses with small stations to educate the community on the services and programs we offer
- Assess library programs to determine how to deploy resources most effectively
- and more!

Questions?



Why are these books in my library?

How we build our collection

To serve our community, our librarians seek materials on a broad range of subject matter that reflect diverse experiences and meet the interests and needs of our entire community, while also making sure that all material is shelved and labeled in an age-appropriate manner.

The majority of books and other materials selected have been reviewed in professional magazines or journals. Purchases are also sometimes made based on requests by library users.

We encourage you to search our catalog for items of interest or complete a request for purchase if you feel the collection is missing an important title.

Ultimately, no book, movie or other library item is the perfect fit for every member of our community, especially works that tackle difficult topics reflecting real-world circumstances. You may find that some speak to your personal values and interests while others contain content you disagree with or find offensive.

While you may be offended by a given item, others may not have the same perspective. The Library has a diverse collection with resources from many points of view, and our mission is to provide access to information for all users.

How do I ensure my children are accessing age-appropriate material?

We have an entire floor set aside for age-appropriate children's books, graphic novels, movies and video games. Library materials for adults are located on a separate floor of the library.

While every parent/caregiver has the freedom to determine which library resources are acceptable for their children, no one has the right to make rules restricting what other people use, or to make decisions for other families.

However, parents should be aware that children have access to all materials in the library. Library staff will not monitor or censor your child's selections.

If you are a parent or guardian, you have the right and responsibility to make decisions about what materials are suitable for your own family. Parents have full access to their child's library account until age 16. Visit a customer service desk if you need assistance accessing your child's library account.

How do I request that library materials be removed?

Reconsideration request forms are available at any customer service desk inside the library.



PLYMOUTH
Public Library

130 Division Street
Plymouth, WI 53073
(920) 892-4416

www.plymouthpubliclibrary.net

City of Plymouth
128 Smith St. - P.O. Box 107
Plymouth, WI 53073-0107



Telephone: (920) 893-3745
Facsimile: (920) 893-0183
Web Site: plymouthgov.com

DATE: February 9, 2023

TO: Mayor and Common Council,

FROM: Tim Blakeslee, City Administrator/Utilities Manager

RE: Approve Ordinance No. 2 of 2023 Adopting the Wisconsin Municipal Records Schedule and updating the legal custodians

Background:

Records retention is currently governed by City Code Section 3-3-1 through 3-3-9. Section 3-3-7 outlines various types City records and their retention timeline. Per Wis. Stat. § 19.21(4)(a), all municipalities are required to notify the Wisconsin Historical Society prior to the removal old records. This is an arduous and lengthy process that requires that a list of records be compiled, snail-mailed, and reviewed by the Wisconsin Historical Society. In some cases, the Wisconsin Historical Society will require that records be reviewed in-person.

In an effort to the streamline records review process, the state has compiled the Wisconsin Municipal Records Schedule (Attachment 1). The Wisconsin Municipal Records schedule is both more encompassing and up-to-date than what is currently listed in the City code. The updated schedule will provide better direction to staff with regards retention requirements, types of records, and notification requirements. Perhaps most importantly, municipalities who adopt the schedule may destroy pre-waived records without providing written notification to the Wisconsin Historical Society after the designated retention timeline for a specific type of record has passed. This will allow City Staff to more efficiently organize and dispose of records moving forward.

Per the state, the schedule should be adopted by the City's governing body via the Notification of Adoption Form (Attachment 2). The Wisconsin Public Records Board (PRB) will then acknowledge Notification of Adoption by returning a signed copy of the adoption to the City. This change must also be made via ordinance to the City Code (Attachment 3).

As part of this process, staff is also making modifications to Section 3-3-3 of the code to update the current list of the legal custodians to accurately reflect the current staffing structure of the City.

Recommendation: Approve Ordinance No. 2 of 2023 Adopting the Wisconsin Municipal Records Schedule and updating the legal custodians

Attachments:

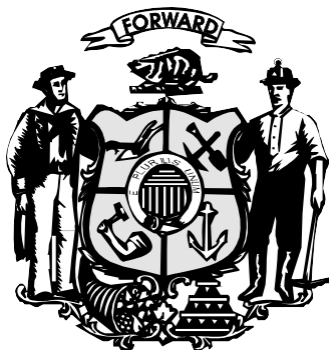
1. Municipal Records Schedule
2. Notification of General Records Schedule Adoption
3. Draft Ordinance No. 2 of 2023

General Records Schedule

Wisconsin Municipal and Related Records

Approved by the Public Records Board:

August 27, 2018



Expiration: August 27, 2028

For use by all units of Wisconsin Government at the Municipal level

Wisconsin Municipal Records Schedule

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Introduction:

Records are a basic tool of transacting business on behalf of all local government units. They are the foundation for government accountability. Records management is regulated by Wisconsin state law, and accordingly, the Wisconsin Municipal Records Schedule (WMRS), upon adoption, provides legal authorization to dispose of records on a regularly scheduled basis. The schedule serves as a mechanism for consistent retention and disposition of similar types of records across all municipal governments and provides assurance of accountability to the public.

The schedule was developed following guidelines for complying with legal, fiscal, and archival requirements for records retention and facilitates cost-effective management of records commonly found in municipal governments.

Wisconsin Statute § 19.21(1) defines public records as “all property and things received from the officer’s predecessor or other persons and required by law to be filed, deposited, or kept in the officer’s office, or which are in the lawful possession or control of the officer or the officer’s deputies.” Records are defined by Wisconsin Statute § 19.32(2) as “any material on which written, drawn, printed, spoken, visual, or electromagnetic information or electronically generated or stored data is recorded or preserved, regardless of physical form or characteristics, that has been created or is being kept by an authority.” Public records are also defined as being “all books, papers, maps, photographs, films, recordings, optical discs, electronically formatted documents, or other documentary materials, regardless of physical form or characteristics, made or received by any state agency or its officers or employees in connection with the transaction of public business” (Wis. Stat. § 16.61(2)(b)).

I. Applicability:

The WMRS is available for adoption by all Wisconsin cities, villages, and towns; along with other non-county local units of government. County governments should refer to the County General Schedule for their record retention requirements. The WMRS is intended to serve as guidance for records that are created or received by your particular unit. Adopting the schedule does not require local units to begin creating any record series that they currently do not produce.

Records retention guidelines apply regardless of record format. Records covered by the WMRS may be retained in electronic, paper, or other formats. The schedule applies to all records: born digital (including those created or transmitted via e-mail), data contained in database systems, tapes/cartridges and other types of electronic records and information systems maintained by agencies. Municipalities must also meet the standards and requirements for the management of electronic records outlined in [Chapter Adm. 12](#).

II. Purpose:

Record schedules are intended to be used by records creators as a tool to SIMPLIFY their records management responsibilities, not to make them more complex. It is the intention of the WMRS to streamline municipal records management by:

- Providing clear and uniform guidance for the retention and disposition of records common to most municipal governments;
- Eliminating the need for individual municipalities to develop and obtain Wisconsin Public Records Board approval of records retention/disposition schedules;
- Facilitating uniformity in the retention and disposition of records across all municipalities; and
- Promoting the cost-effective management of municipal records.

III. Implementation:

The WMRS is a schedule that municipalities MAY adopt to manage their records. Municipalities ARE NOT required to adopt the schedule for use. The WMRS does not replace the ability of municipalities to create and adopt records schedules through the creation of ordinances. See Additional Options below for more information.

To adopt the Schedule:

- Submit the original and two copies of the [Notification of General Schedules Adoption](#) (PRB-002) form to:
State Archivist
Wisconsin Historical Society
816 State St.
Madison, WI 53706
- The Wisconsin Public Records Board (PRB) will acknowledge your Notification of Adoption by returning a signed copy of the adoption to the municipality.
- After confirmation of PRB approval, municipalities should enact an ordinance adopting the WMRS as their official schedule.

Municipalities are expected to supersede any previously approved, unique, ordinances which cover records included in the adopted Municipal Schedule. Retain any approved schedules in existing ordinances for records that ARE NOT covered by the Municipal Schedule.

Additional Options:

All municipalities may adopt the PRB approved General Records Schedules to supplement the WMRS. See [Section VI](#) of this instruction for more information.

Specific schedules may also be set by Records Disposition Authorizations (RDAs). Please consult the PRB webpage on [Information for Counties and Municipalities](#) for more information and instructions.

Municipalities that choose not to adopt the WMRS are still required to schedule the destruction of obsolete records through ordinance as stated in Wis. Stat. 19.21(4). Retention periods that are not specifically set by state statutes CANNOT be scheduled for less than 7 years without approval from the PRB.

IV. Using the Schedule:

The WMRS is arranged in five different sections covering the record series created by municipal governments. Some sections are broken down into subsections to provide easier reference. The following is an example of the format used in each section and an explanation of the information found in each column.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Subsection				

- Record Series Title – Descriptive title of the record series. This is a basic title, not necessarily universally used by all municipalities.
- Series Description – Brief overview of the records that are included in the record series.
 - If a specific statute or legal source defines a retention period for the records it is identified in this field.
- Retention – Indicates the minimum time period a record series must be maintained and a description of what initiates the start of the retention clock.
 - **Creation:** Is used when the creation of the record initiates the retention time period. (*Example:* If a RDA existed for ABC Annual Reports, the event might be written as *Creation+ 3 years* meaning an ABC Annual Report must be retained for three years after it is created.)
 - **Fiscal:** Is used if the retention time period is initiated by the end of a fiscal year. (*Example:* RDAs that exist for annual budgets might be written as *Fiscal+ 6 years* meaning a budget would have to be retained for six years after the end of that fiscal year.)
 - **Event:** Is used if a specific event other than Creation or Fiscal initiates the retention time period. (*Example:* A RDA that exists for a housing relocation program has the event written as *Event+ 5 years; Event=Approval Letter for Relocation Plan*". In this scenario, it means all records associated with this RDA have to be retained for five years after the official letter was sent by the state to approve the relocation plan.)

- **Permanent:** Is used if the records need to be maintained permanently by the creating municipality. See [Guidelines for the Permanent Retention of Records](#).
- General references on retention periods for municipal records are found in Wis. Stat. § 19.21(4)(b), Wis. Stat. § 19.21(6), or Wis. Stat. § 19.21(8).
- **Confidential** – Indicates whether or not the record series contains information that is required by statute to be kept confidential. See Section V of this guide for more information on confidential records.
- **WHS Notification** – Wis. Stat. § 19.21(4)(a) requires that all municipal public records must be offered for transfer to the Wisconsin Historical Society 60 days prior to their destruction. This field indicates if notification to the Wisconsin Historical Society is required before records can be destroyed. Column will either state NOTIFY or WAIVED.
 - **Waived:** The Wisconsin Historical Society has determined the record series has low historical value and waived the notification period as indicated Wis. Stat. § 19.21(4)(a). Municipalities are free to destroy any waived records without notification once they reach their required retention period.
 - **Notify:** You are required to send written notification to the Wisconsin Historical Society before destruction. Please contact the Wisconsin Historical Society with questions on how to properly notify on the destruction of public records.
 - **N/A:** indicates that the retention is permanent.

Final Disposition:

Municipal records, which have met the retention time outlined in the WMRS, have only two dispositions: Destroy or transfer to the Wisconsin Historical Society. Records that are held beyond their retention period but are not destroyed are still subject to all public records laws.

- **Destruction:** Records identified as “waived” in this schedule may be destroyed without notifying the Wisconsin Historical Society. Local units should dispose of all public records in a manner that ensures they are completely destroyed.
 - If records contain confidential information, or “information that can be associated with a particular individual through one or more identifiers or other information or circumstances” (Wis. Stat. § 19.62(5) including, but not limited to names, addresses, social security numbers, and banking information it must be destroyed confidentially. This means that these records must be disposed of in a way that renders them unreadable and unable to be reconstructed. Typically, this can be achieved by cross cut shredding or pulping. Many organizations disposing of confidential information choose to hire a vendor to handle the process.
 - **Note on records older than 75 years:** the waived designation does not apply. Notification should be given on any records 75 years or older regardless if they have been indicated in the schedule as having been waived.
- **Transfer:** Records identified as “notify” must be offered, in writing, to the Wisconsin Historical Society. Per Wis. Stat. § 19.23(2), the Wisconsin Historical Society assumes title control and public records responsibility of all transferred records. Obsolete municipal records may not be transferred to local historical societies or other repositories because the statutes do not specify other institutions can hold title to public records. Only the records creators and the Wisconsin Historical Society are identified in statutes as being official holders of title. Information on transferring records can be found on the [Society's webpage](#) pertaining to proper handling of obsolete records.

- Permanent: Records identified as “permanent” have been identified as containing significant historical information and long term business value. Therefore municipalities are responsible for ensuring the long-term preservation of these records. The Wisconsin Historical Society will, in certain circumstances, accept “permanent” records for transfer if the municipality is unable to maintain these records.

Records that have passed their retention period should not be destroyed if any of the following conditions apply:

- Records are required for financial or performance audits either currently underway or known to be planned.
- Records are subject to a “legal hold” because they may be relevant to an existing, pending, or anticipated legal proceeding.
- A related open records request has been received and not completed, or statutorily required time periods have expired.

V. Confidential Records and Personally Identifiable Information (PII)

Confidential Records:

Some records series may contain confidential or restricted access records. The WMRS identifies any record series containing information required by Wisconsin Statute, administrative rule, or other legal authority to be kept confidential or protected from public access. The confidential column is marked “yes” if ANY records in the series may contain confidential information.

Even when specific confidentiality statutes do not apply, application of substantive common law principles through the balancing test considerations under Wis. Stat. § 19.35(1)(a), may affect disclosure of the record under the public records law.

When an individual or an individual’s representative makes an open records request for records containing personally identifiable information about that individual, there is no balancing test, but the disclosure exceptions under Wis. Stat. §19.35(1)(am), must be considered. Wis. Stat. §19.35(1)(am) exceptions include:

- endangering an individual’s life or safety;
- endangering the security of a prison, including the security of the population or staff;
- identifying a confidential informant; and
- records collected or maintained in connection with complaints, investigations, or other circumstances that may lead to various administrative or court proceedings.

It is strongly recommended that local governments consult with legal counsel when responding to an open records request. Additional resources on open records requests can be found by visiting the Wisconsin Department of Justice, [Office of Open Government’s website](#).

Personally Identifiable Information (PII):

Wisconsin law defines Personally Identifiable Information (PII) as “information that can be associated with a particular individual through one or more identifiers or other information or circumstances” (Wis. Stat. § 19.62(5)). The municipal unit is responsible for evaluating their record series to determine if PII is included. The inclusion of PII does not automatically restrict records, nor does it make them confidential. The confidential column is only marked “yes” in cases where specific statutes restrict access.

VI. Additional Schedules:

Municipal governments should be aware that there are additional schedules that apply to public records. All Wisconsin municipalities have the option of adopting any of the [General Records Schedules](#) that have been approved by the PRB. These schedules may cover additional record series not found in the WMRS. In some cases, the WMRS points to the General Schedules for covering some specific records series (such as personnel records). Information on adopting schedules can be found on the PRB [Counties and Municipalities Resource Webpage](#).

Municipalities should also be aware that there are two separate General Records Schedules for the following:

- [Wisconsin School Districts](#)
- [Wisconsin Public Libraries and Library Systems](#)

In addition, municipalities should check the schedule set by the Public Service Commission of Wisconsin (PSC) for Municipal Utilities. A complete list of records and schedules is located in “[Investigation to Consider Proposed Changes to Records Retention Requirements for Electric, Gas and Water Utilities.](#)”

Municipal Court Records are scheduled by [Supreme Court Rule 72](#), which specifies the retention periods for court records and requires municipal courts to give 60 day notice to the Wisconsin Historical Society prior to destroying obsolete records. Furthermore, SCR 72 states that notice is not required for records in which “the historical society has indicated, by blanket waiver, that it has no interest for historical purposes.” The Wisconsin Historical Society has waived the sixty-day notification period for all municipal court records dated 1941 or later. This waiver applies to all municipal courts throughout the state and allows for the disposal of municipal court records without further notification. Municipal Courts are still obligated to maintain the records for the minimum time specified in SCR 72. Please contact the Wisconsin Historical Society if you have any questions regarding Municipal Court Records.

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Administrative Records

Requirements Specific to Administrative Records

The Administrative Records section is organized by the following subsections:

- Administration (general)
- Common Council/Village Board/Town Board
- Emergency Planning
- Human Resources/Personnel
- Legal
- Licenses and Permits
- Municipal Land Ownership
- Municipal Vehicles
- Payroll
- Real Property Titles

This section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review and consult the appropriate General Records Schedules listed below:

- [Administrative Records General Schedule](#)
- [Fleet and Aircraft Management Records](#)
- [Human Resources and Related General Schedule](#)
- [Payroll & Related General Schedule](#)

Municipal Court Records are scheduled by [Supreme Court Rule 72](#), which specifies the retention periods for court records and requires municipal courts to give 60 day notice to the Wisconsin Historical Society prior to destroying obsolete records. Furthermore, SCR 72 states that notice is not required for records in which “the historical society has indicated, by blanket waiver, that it has no interest for historical purposes.” The Wisconsin Historical Society has waived the sixty-day notification period for all municipal court records dated 1941 or later. This waiver applies to all municipal courts throughout the state and allows for the disposal of municipal court records without further notification. Municipal Courts are still obligated to maintain the records for the minimum time specified in Supreme Court Rule 72. Please contact the Wisconsin Historical Society if you have any questions regarding Municipal Court Records.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Administration Records (general)				
Appointment Files	Materials documenting appointments and nominations to boards, task forces, councils, or other bodies. May include applications; cover sheets, letters of recommendation, resumes, and correspondence.	Event+2 years; Event=End of term	No	Notify
Appointment Files (not selected)	Unsuccessful appointments and nominations to boards, task forces, councils, or other bodies.	Event+1 year; Event=Position filled	No	Waive
Committee Records and Minutes (Excluding Common Council and Zoning Board)	Records of committees, boards, councils, and commissions, other than Common Council. Includes meeting minutes, agenda packets, reports, and resolutions. See Common Council section for retention of Common Council Minutes. See schedule for Zoning Board Records in Public Works Section.	Creation+7 years	No	Notify
Complaints (External)	File related to complaints regarding issues not related to a specific program. Complaints are not otherwise regulated by state or federal requirements.	Event+2 years; Event=Complaint resolution, dismissal or end of litigation	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Contracts and Agreements	Any contracts or agreements to which the municipality is a party.	Event+6; Event=End date or cancellation of contract	No	Waive
Correspondence (Senior Level or Elected Official)	Business-related correspondence (paper and electronic) of senior level staff and elected officials.	Event+6 months; Event=Separation from position/end of term Note: Correspondence that relates specifically to a program or project may need to be retained per that particular schedule	No	Notify
Correspondence (General Staff)	Business-related correspondence (paper and electronic) of non-appointed general staff.	Event+1 year; Event=Creation or receipt Note: Correspondence that relates specifically to a program or project may need to be retained per that particular schedule	No	Waive

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Grants	Records relating to grant-funded projects where the agency is the grant recipient or issuer, including the application process, the receipt and expenditure of grant funds, or denial.	Event+4 years; Event=Date of final report or notification of denial	No	Waive
House Number and Address Change File	Provides official control and reference source for city addresses.	Permanent	No	N/A
Internal Policies and Procedures	Established departmental policies and procedures. Note: May also be called administrative practices or directives or executive directives.	Event+7 years; Event=Date the policy/procedure is superseded or made obsolete	No	Waive
Memorandums of Understanding (MOU) & Service Level Agreements (SLA)	Agreements between government units. Sometimes define agreements between a large government unit's separate divisions or bureaus.	Event+4 years; Event=Ending date of the MOU or SLA.	No	Waive
Notice of Removal of Human Corpse	Form for the removal of a human corpse if death occurs in a hospital, nursing home, or under hospice care at any location.	Event+2 months; Event=Date of death	No	Waive

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Oath of Office	Elected or appointed municipal officers may be required to take, and file in writing, an official oath within ten days after receiving notice of election or appointment.	Event+5 years; Event=End of term	No	Waive
Open Records Requests and Responses	Records relating to regular and reformulated, repetitious, systematic or continuing requests by individuals, groups or organizations for access to general information under the provisions of the Wis. Stats. §§ 19.35-19.37.	Event+3 years; Event=Response provided	No	Waive
Organizational Chart	Repository of the official organizational structure of offices.	Event; Event=Superseded	No	Waive
Organizational Planning	Includes division and unit strategic business and operational planning files such as, but not limited to, final plan and significant work papers.	Event+7 years; Event=Completion of plan	No	Notify
Petitions	Petitions submitted to municipalities for improvements or changes to existing municipal services/structures.	Event+7 years; Event=Petition approved or denied	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Press/News Releases	Information about municipality programs and events.	Creation+3 years	No	Notify
Proclamations	Proclamations issued by the mayor, commissioner, or elected executive on behalf of the municipality.	Event+1 year; Event=End of elected representative's final term	No	Notify
Reports (Annual)	Annual reports produced by all departments and programs.	Event+7 years; Event=Date of issue	No	Notify
Reports (Monthly)	Monthly reports of divisions/committees.	Creation+3 years	No	Waive
Subject Files (Senior Level or Elected Official)	Subject files (paper and electronic) of senior level staff such as department heads and elected officials.	Event+6 months; Event=Separation from position/end of term	No	Notify

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Common Council/Village Board/Town Board				
Affidavits of Publication	Records providing proof of publication for legal notices as required by law. (Note: See Wis. Stat. § 985.12 for more information on proof of publication).	Event+7 years; Event=Date of publication	No	Waive
Audio Tapes	Recordings of meetings used to produce minutes. Authority provided by Wis. Stat. § 19.21(7).	Event+90 days; Event=Date the minutes have been approved and published	No	Waive
Minutes (Common Council)	Official minutes of the Common Council/Village Board/Town Board.	Permanent	No	N/A
Ordinances	Official ordinances and any ordinance books kept by municipalities.	Permanent	No	N/A
Resolutions	Official records pertaining to resolutions passed by municipalities.	Permanent	No	N/A

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Emergency Planning¹				
Continuity of Government Operational Plan and Documentation	Agency official plan and documentation of the Continuity of Operations Plan/Continuity of government plan.	Event; Event=superseded by revised plan	No	Waive
Critical Incident Management Plans	Critical incident management plans, local site security plans, local emergency action plans, life safety, and other similar documents.	Event+3 years; Event=superseded by revised plan	No	Waive
Disaster Recovery Records	Records created during the disaster recovery process.	Event+3 years; Event=Date recovery effort is complete ²	No	Waive
Human Resources/Personnel				
Grievance Case File	Records of grievances filed by employees.	Event+7 years; Event=Date grievance is closed	Yes ³	Waive

¹ No specific statutes restrict the records in this series. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to release.

² Note: When Federal Grant money is involved, the retention is 3 years from the date of the final Financial Services Report.

³ No specific statutes restrict this type of record. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to releasing this type of record. Personnel files may contain patient health records which may be protected by Wis. Stat. § 146.82 and/or the Health Insurance Portability and Accountability Act (HIPAA).

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Personnel Files	Documents employee personnel actions during the employment of the employee. Applies to ALL employees.	Event+7 years; Event=End of employment/service	No ⁴	Waive
Legal				
Attorney Opinions	Municipal attorney opinions given to answer specific questions regarding the interpretation and application of statutes and ordinances, or other legal matters.	Permanent	No ⁵	N/A
Case Files	Files include, but are not limited to, pleadings and legal arguments, evidence, research, orders, legal summons and subpoenas issued. ⁶	Event+7 years; Event=Close of case	No ⁷	Notify on historically significant cases only ⁸

⁴ No specific statutes restrict this type of record. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to releasing this type of record. Personnel files may contain patient health records which may be protected by Wis. Stat. § 146.82 and/or the Health Insurance Portability and Accountability Act (HIPAA).

⁵ Records may contain material protected by Attorney-Client Privilege Wis. Stat. § 905.03.

⁶ Records may contain the client file with information pertaining to expenses, attorney notes, medical records, government agency filings, discovery such as requests for production of documents, deposition transcripts, and evidence.

⁷ Records may contain material protected by Attorney-Client Privilege Wis. Stat. § 905.03.

⁸ Historically significant case files include those that have established legal precedents; cases that received widespread attention from the public and news media; and cases recognized for their uniqueness. Examples of such cases include, but are not limited to, major civil rights cases, major labor relations cases, major environmental cases, cases dealing tribal governments and treaty rights, major cases with constitutional implications, and cases related to major prosecutions of public officials.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Licenses and Permits				
License Applications	Includes license applications (approved and unapproved) and license stubs. Includes all non-alcohol related licenses including, but not limited to, non-intoxicating beverages, soda water beverages, food handling and sales, mobile home park licenses, restaurant, retail dairy products, pet, and animals. Also includes permits for the excavation of streets by private utility companies.	Creation+3 years	No	Waived
Liquor and Beer Licenses	Includes license applications (approved and unapproved) and license stubs. Authority provided by Wis. Stat. § 125.04(3)(i).	Creation+4 years	No	Waived
Permits	Permits for public space usage. Includes, but not limited to, burning, street usage, and parking permits. NOTE: See Public Works Section for retention of building permits.	Creation+5 years	No	Waived
Permits (septic tanks)	Permit for a septic tank. The permit records the location and ownership of the tank.	Permanent	No	N/A

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Municipal Land Ownership				
Land Titles, Conveyances and Easements	Documentation for municipal owned land. Also includes any legal rights granted to others that relate to municipal owned land.	Permanent	No	N/A
Sales of Facilities and/or Land (Case Files)	Includes appraisals and related valuations. Projects where a municipality plans or actually sells either facilities and/or land assets.	Event+6 years; Event=date of the completion of the transaction	No	Waived
Municipal Vehicles				
Motor Vehicle Control and Assignment Records	Documentation of agency motor vehicle assignments to employees. Includes completed documentation on reservations for pool cars, individual trips, driver profiles, check-in and checkout logs.	Event+1 year; Event=date the vehicle is disposed	No	Waived
Motor Vehicle and Heavy Equipment Maintenance Records	Records documenting service and repair orders to motor vehicles. These records normally include maintenance orders, logs, fiscal documents, such as requisitions or purchase orders for parts or services, vehicle warranties, operation and repair manuals and parts lists.	Event+1 year; Event=date the vehicle is disposed	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Vehicle Use Agreements	Agreements between individuals and municipalities required before driving a municipal owned vehicle.	Event+1 year; Event=termination of agreement or employment	No	Waived
Vehicle Inspection Reports	Inspections of municipal vehicles.	Event+1 years; Event=date the vehicle is disposed	No	Waive
Payroll⁹				
Employee Payroll & Benefit File	Includes various documents that are maintained throughout the employee's term of employment.	Event+7 years; Event=Employee retirement, transfer or termination	No	Waived
Monthly and Quarterly Payroll Reports	Includes, but is not limited to, quarterly report of federal income tax withheld; quarterly report, payroll summary; state's quarterly report of wages paid, and monthly memorandum report.	Event+5 years; Event=Report Issued (provided record has been audited)	No	Waived

⁹ No specific statutes restrict this record series. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to releasing this type of information.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Payrolls and Payroll Registers	Payroll listings showing gross and net pay, as well as deductions for state employees. Referred to on questions of back pay and income taxes.	Creation+4 years	No	Waived
Real Property Titles				
Title Documentation	Records documenting the title of land owned by the municipality including the abstract and certificate of title, opinions of title, and title insurance policies.	Permanent	No	N/A

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Cemetery Records

Requirements Specific to Cemetery Records

Municipalities and towns are required to assume ownership of abandoned private cemeteries. Cemeteries are considered abandoned if the cemetery association or other organization that once cared for the cemetery no longer exists and no legal owner can be found (Wis. Stat. § 157.115(1)).

- The municipality or town must care for the cemetery to the same standards as other municipal or town cemeteries.
- Six or more residents of your town or municipality may petition the circuit court to require that the town or municipality assume ownership or move any graves to another location.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Annual Report and Documentation	Includes the annual report to the cemetery board and the records needed to prepare the report. Authority provided by Wis. Stat. § 157.62(4).	Permanent	No	N/A
Care Funds	An accounting of amounts deposited in, amounts withdrawn from, other income accruing to, and the balance at the end of the reporting period of care funds of the cemetery, including the funds in Wis. Stat. § 157.11(9g)(a), Wis. Stat. § 157.12(3), and Wis. Stat. § 157.125. Including records that show, for each deposit, the name of the purchaser or beneficiary of the contract relating to the deposit and the item purchased. Authority provided by Wis. Stat. § 157.62(4).	Permanent	Yes Confidential per Wis. Stat. § 157.62(2)(c)	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Contract for Sale	Copy of each contract for the sale of a cemetery lot, mausoleum space, or cemetery merchandise. Authority provided by Wis. Stat. § 157.62(4).	Event=3 years; Event=After all of the obligations of the contract have been fulfilled	No	Waive
Grave Registration Records	Records that describe who is buried, the date of death, interment and location of the remains.	Permanent	No	N/A
Preneed Trust Funds	An accounting of amounts deposited in, amounts withdrawn from, income accruing to, and the balance at the close of the reporting period of any preneed trust funds of the cemetery. Including records that show, for each deposit, the name of the purchaser or beneficiary of the contract relating to the deposit and the item purchased. Authority provided by Wis. Stat. § 157.62(4).	Event+15 years; Event=Date of the deposit or withdrawal	Yes Confidential per Wis. Stat. § 157.62(2)(c)	Waive
Reburial of Human Remains	Includes records confirming an attempt to notify individuals specified in Wis. Stat. 157.112(3)(b)1.-4. when none of the individuals specified are available. Authority provided by Wis. Stat. § 157.112(3m).	Permanent	No	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Report for Final Disposition	<p>Report for final disposition completed by the funeral director or other person preparing the body for burial or other final disposition. The reports are filed with the local register, but may also be filed with the cemetery to serve as a record of interment.</p> <p>Authority provided by Wis. Stat. § 135.06(1)(a)(1).</p>	Permanent	No	N/A

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Community Development/Public Services

Requirements Specific to Community Development/Public Services

The Community Development/Public Services section is organized by the following subsections:

- Housing Program
- Outreach
- Parks
- Public Transportation
- Sanitation

This section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review the [County General Schedule](#) for reference on scheduling similar records. The County General Schedule cannot be adopted by municipalities for use, but the schedules can be used for creating record schedules through municipal ordinances.

Municipalities that have records pertaining to Public Health should use the County General Schedule to create ordinances to schedule those records.

The retention of public transportation surveillance recordings is covered by the schedule for [surveillance recordings](#) listed under the subsection Maintenance and Operations in the Public Works section.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Housing Program				
Program Files	Correspondence, breakdown of projects, HUD regulations, and supporting files.	Event+7 years; Event=Audit	No	Notify
Outreach				
Public Program Files	Outreach programs for municipality sponsored programs.	Event+7 years; Event=Superseded or end of program, whichever is first	No	Notify
Parks				
Park Master Plan	Master plans for parks and park systems. May include maps, drawings, photographs, and reports.	Superseded	No	Notify
Program Files	Records relating to programs, events, and activities.	Creation+3 years	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Reservation Requests, Rental Agreements, Use Permits, and Contracts	Permits, agreements, and contracts for the use of parks, shelters, and facilities.	Event+3 years; Event=Date of reservation	No	Waived
Supervisors Daily Report of Work Completed	Summarizes progress made on a particular job, noting the time required, employees assigned and vehicles used.	Creation+2 years	No	Waived
Public Transportation				
Accessible Boarding Reports	Reports documenting the accessibility of vehicles.	Creation+5 years	No	Waive
Americans with Disabilities Act (ADA) Customer Eligibility Files	Files determining the eligibility of customers for ADA transit programs.	Event+6 years; Event=Termination of service or participation by customer	Yes Patient health information may be protected by Wis. Stat. § 146.82	Waive
Bus Route Schedules and Timetables	Documentation of transit schedules, timetables, routes, and route history.	Event+3 years; Event=Superseded	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Dispatch Files	Boarding and alighting, extra board weekly projections and assignments, daily work schedules, and bid mark-ups.	Creation+7 years	No	Waive
Fare Information Files	Research, background, studies, and other materials used to determine fares.	Creation+7 years	No	Waive
Operation Reports	Daily, weekly, or other periodic reports summarizing transit system operations and ridership and lost and found reports.	Creation+3 years	No	Waive
Operator Assignment Records	Documentation of assignment of individual operators to routes and shifts.	Creation+3 years	No	Waive
Sanitation				
Composting Regulations	Documents pertaining to the disposal of yard waste.	Event+7 years; Event=superseded	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Curbside Recycling Program	Documentation of the curbside recycling program including policies, procedures, and administration of the program.	Event+7 years; Event=superseded	No	Waive
Drop Off Site/Recycling Yard Waste	Site operation files and records.	Creation+7 years	No	Waive
Household Hazardous Waste Collection Center	Records related to the collection and disposal of paints, corrosives, flammables, toxics, used motor oil, and car/truck batteries.	Creation+30 years	No	Waive
Landfill/Garbage Dump Sites	Location of any fill, records of materials deposited, cover materials used, reports of leachate and methane leakage and treatment, source of fill materials, (household, commercial) source of cover materials, and inspection reports.	Permanent	No	N/A

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Election Records

Requirements Specific to Election Records

Additional information regarding election records is available through the Wisconsin Election Commission. Municipalities are encouraged to review the [Election Administration Manual](#) available on the Wisconsin Elections Commission Website for more in-depth information about managing election related records. Retention times in this section that are not specifically stated in Wisconsin Statutes are taken from the *Election Administration Manual*.

- Federal Election records must be maintained for 22 months as specified in Wis. Stat. § 7.23(1)(f).
- Recounts or Pending Litigation are subject to a longer retention pending litigation or recounts as specified in Wis. Stat. § 7.23(2).
- All other material not described below are identified by Wis. Stat. § 7.23(1)(k) as having a retention period of 90 days after the election.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Ballots and Equipment				
Applications for Absentee Ballots (Federal Elections)	Includes copies of proof of identification when submitted with application. Authority provided by Wis. Stat. § 7.23(1)(f).	Event+22 months; Event=Election ¹⁰	No	Waived

¹⁰ All materials and documentation associated with a federal election must be retained at least 22 months after the election. Federal elections include those for the office of President of the U.S., U.S. Senator, and U.S. House of Representatives (Wis. Stat. § 7.23(1)(f)).

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Applications for Absentee Ballots (State, County, Local Elections)	Includes copies of proof of identification when submitted with application. Authority provided by Wis. Stat. § 7.23(1)(k).	Event+90 days; Event=Election	No	Waived
Ballots (Federal Elections)	Federal election ballots. Authority provided by Wis. Stat. § 7.23(1)(f).	Event+22 months; Event=Election	No	Waived
Ballots (State, County, Local Elections)	State, county, local offices. Authority provided by Wis. Stat. § 7.23(1)(h).	Event+30 days; Event=Election	No	Waived
Ballots (Unused and related Materials)	Only applies to unused ballots and materials. Authority provided by Wis. Stat. § 7.23(1)(a).	Event+3 business days; Event=Completion of all election canvasses ¹¹	No	Waived

¹¹ Materials must be retained in event a petition for recount has been filed.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Detachable Recording Units	Data storage devices used in electronic voting equipment. Authority provided by Wis. Stat. § 7.23(1)(g).	Event+21 days; Event=Election ¹²	No	Waived
Detachable Recording Units (Primary Elections)	Data storage devices used in electronic voting equipment. Authority provided by Wis. Stat. § 7.23(1)(g).	Event+14 days; Event=Election ¹³	No	Waived
Campaign				
Campaign Finance Reports	Financial disclosure reports filed by candidates during election campaigns. Authority provided by Wis. Stat. § 7.23(1)(d).	Event+6 years; Event=date of receipt	No	Waived

¹² Before clearing or erasing the units or compartments, a municipal clerk shall transfer the data contained in the units or compartments to a disk or other recording medium which may be erased or destroyed 22 months after the election to which the data relates. The requirement to transfer data does not apply to units or compartments for use with tabulating equipment for an electronic voting system that was approved for use prior to January 1, 2009, and that is not used in a federal election.

¹³ Before clearing or erasing the units or compartments, a municipal clerk shall transfer the data contained in the units or compartments to a disk or other recording medium which may be erased or destroyed 22 months after the election to which the data relates. The requirement to transfer data does not apply to units or compartments for use with tabulating equipment for an electronic voting system that was approved for use prior to January 1, 2009, and that is not used in a federal election.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Campaign Registration Statements	Statements filed by candidates for public office. Includes Notification of Non-candidacy for reelection forms. Authority provided by Wis. Stat. § 7.23(1)(d).	Event+6 years; Event=termination issued by the registrant	No	Waived
Reports and Lists				
Official Canvassers Statements	Prepared statement showing the results of each election. Authority provided by Wis. Stat. § 7.23(1)(i).	Event+10 years; Event=election	No	Waived
Election Notices	Includes proofs of publication and correspondence filed in connection with such notices. Authority provided by Wis. Stat. § 7.23(1)(j).	Event+1 year; Event=Election	No	Waived
Election Notices (Federal Elections)	Includes proofs of publication and correspondence filed in connection with such notices. Authority provided by Wis. Stat. § 7.23(1)(j).	Event=22 months; Event=Election	No	Waived
Election Voting and Registration Statistics Reports	Reports filed by municipal clerks on registration, voting, and absentee voting. Authority provided by Wis. Stat. §§ 6.275-6.276.	Event+22 months; Event=Election	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Ineligible Elector Registrations	<p>Elector registrations deemed ineligible for voting. Status and reasons for ineligibility should be noted.</p> <p>Authority provided by Wis. Stat. § 7.23(1)(c).</p>	<p>Event+4 years; Event=When deemed ineligible</p>	No	Waived
Poll (Voter) Lists	<p>List compiled by election officials on election day showing the names and addresses of electors who actually cast votes in an election defined in Wis. Stat. § 5.02(14).</p> <p>Authority provided by Wis. Stat. § 7.23(1)(e).</p>	<p>Event+22 months; Event=Election</p>	No	Waived

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Finance Records

Requirements Specific to Finance Records

The Finance section is organized by the following subsections:

- Budget
- Fiscal
- Purchasing

Municipalities are encouraged to adopt the following general schedules in instances where this schedule does not adequately provide coverage for all types of records that could be created:

- [Budget & Related General Records Schedule](#)
- [Fiscal & Accounting Related Records General Schedule](#)
- [Purchasing & Procurement General Schedule](#)

Note: Records in this series may contain confidential or restricted information. Even when specific confidentiality statutes do not apply, application of substantive common law principles through the balancing test considerations under Wis. Stat. § 19.35(1)(a), may affect disclosure of the record under the public records law. Please consult [Section V: Confidential Records and Personally Identifiable Information \(PII\)](#) of the Introduction for more information on this topic.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Budget				
Approved Annual Operating Budget	Records related to establishing the base level agency annual operating budget each fiscal year.	Fiscal+6 years	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Audit Reports	Reports that evaluate the financial holdings of the municipality.	Event+3 years; Event=Final report issued	No	Waived
Budget Documents/ Development	Records include final budget requests (forms or their equivalents), justifications/analysis, policy papers, related correspondence, and requests for information.	Fiscal+6 years	No	Waived
Final Budget Submittal	The final budget document for the municipality.	Fiscal+6 years	No	Waived
Municipal Borrowing				
Bond Records	All records associated with municipal bonds. Also includes the bond register, bond payment register, and any certificates of destruction when the bond agent has been authorized to destroy cancelled bonds, coupons, and promissory notes.	Event+7 years; Event=Bond issue expires or following payment of all outstanding matured bonds/notes/coupons, whichever is later	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Payments and Receipts				
Bank Statements/ Reconciliations	Statements received from institutions holding the municipality's funds.	Creation+7 years	No	Waived
Cashbook	Overall record accounting for receipts and disbursements, usually for fiscal or calendar year.	Event+7 years; Event=Audit	No	Waived
Collection & Disbursement Reports	Reports showing the amounts collected, amounts retained by county/local government, and portion sent to state.	Event+3 years; Event=Transaction date	No	Waived
Credit Card Receipts or Information Received from Sales	Credit card receipts and related documentation associated with credit card transactions.	Event+3 years; Event=Transaction date	No	Waived
Financial support records	Records used in reconciling bank statements and verifying expenditures. Includes, but not limited to, credit/debit notices, cash reconciliations, and deposit stubs.	Event+1 year; Event=Audit	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Issued Checks	Checks issued by the municipality that are outstanding or have been cleared by the bank.	Creation+7 years	No	Waived
Purchasing				
Contract and Request for Bid /Proposal File	Records pertaining to the procurement of all commodities and services which may require a contract. This includes both successful and unsuccessful bids.	Event+6 years; Event=End date of resulting contract or cancellation date of contract or bid/proposal	Yes ¹⁴ Some information may qualify for Trade Secret protection per Wis. Stat. § 19.36(5).	Waived
Vendor Performance Files	Documentation of vendors and contractors who fail to meet the terms and specifications of purchasing contracts.	Event+6 years; Event=End of contract	No	Waived

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¹⁴ Some information may qualify for other legal protection such as copyright, patent, trademark or licensing. It is possible some vendors may identify information as confidential that is not actually protected by law.

Public Works

Requirements Specific to Public Works

Records in the Public Works section are arranged under the following subsections:

- Building Inspection
- Engineering
- Maintenance and Operations
- Planning and Zoning
- Utilities

The Public Works section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review and consult the appropriate General Records Schedules listed below:

- [Facilities Management and Related Records](#)

Wis. Stat. § 19.21(4)(b) defines the minimum retention cities, villages, and towns may set for water stubs, receipts of current billing, and customer's ledgers of any municipal utility as 2 years. In addition, municipalities should check the schedule set by the Public Service Commission of Wisconsin (PSC) for Municipal Utilities. A complete list of records and schedules is located in "[Investigation to Consider Proposed Changes to Records Retention Requirements for Electric, Gas and Water Utilities.](#)"

Schedules specific to Police/First Responder records are not included in the WMRS. Consult the County General Schedule for records schedules for similar records which can be used as a basis for the creation of schedules and/or ordinances.

Surveillance recording schedule applies to municipally operated security footage for public buildings, street cameras, and public transportation. The schedule **does not apply** to footage recorded by police body cameras, patrol dashboard cameras, or any similar police recording device.

Municipalities should have adequate and clear procedures in place that explain the proper handling and destruction of surveillance recordings. Clear communication with appropriate municipal personnel will help to ensure that the record is not destroyed prematurely and public requests and/or any legal or program needs are met in a timely manner.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Building Inspections				
Building Inspection Records	Summary of inspection history of a particular property. Records include original building permit, site plans, certificate of occupancy, conditional use documents, comprehensive design reviews, and violations for both residential and commercial structures. Also includes inspection of plumbing, electrical, ventilation, heating, and air conditioning.	Event+1 year; Event=Life of building	No	Waived
Building Plan Review and Inspection	Conditionally approved building plans, calculations, and correspondence. Authority provided by Wis. Admin. Code § SPS 361.60(5)(f)1.b. Note: applies to certified municipalities only (see Wis. Admin. Code § SPS 361.60(2)). ¹⁵	Event+4 years; Event=Construction completed	No	Waived

¹⁵ Note: Refer to Wis. Admin. Code § SPS 361.60(5) for detailed information on the specific types of buildings that first class, second class, and other municipalities are authorized by the Department of Safety and Professional Services to review. Prior to applying this schedule, the Municipality must review and take the steps outlined in Wis. Admin. Code § SPS 361.60.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Building Plans: Residential 1 and 2 Family Dwellings	Includes architectural, design specs, structural and utility plans submitted for inspection review. Authority provided by Wis. Admin. Code § SPS 320.10(6)(a)2.	Event+4 years; Event=Construction completed	No	Waived
Building Inspection: Residential 1 and 2 Family Dwellings	Applications forms, correction orders, correspondence and inspection records. Authority provided by Wis. Admin. Code § SPS 320.10(6)(a)3.	Event+ 7 years; Event=Construction completed	No	Waived
Code Compliance Inspection Reports	Reports completed during field investigations to determine if buildings and system installations comply with the specifications of appropriate codes.	Permanent	No	N/A
Engineering				
Airport Improvement Petition File	Material submitted to the Department of Transportation when a municipality wants to make an improvement to the airport. Records may include public hearing records, briefs, reports and recommendations, and correspondence.	Event+7; Event=petition submitted to DOT	No	Waived
Airport Master Plan	The Airport Master Plan provides information about the condition of the airport and projects development for the next 20 years.	Event+20 years; Event=new plan issued	No	Notify

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Municipal Construction Projects: Final As-Built Plans	Final as-built plans and original drawings for public buildings, streets, sewers, sidewalks, etc.	Event; Event=Life of structure	No	Waive
Municipal Construction Projects: Final As-Built Plans (Historically Significant)	Use for historically significant projects. (Typically large-scale projects. May include construction of a major municipal facility, as well as projects involving facilities significant to the State of WI or United States history; buildings on the State or National Register of Historic	Event: Event=Life of structure	No	Notify
Environmental Assessment & Impact Statements	Official copies of environmental assessments, impact statements and related documentation related to municipal construction projects. ¹⁶	Event+6 years; Event=Termination of municipal ownership of the land	No	Notify
Maps: Construction and Topographical	May include maps covering environmental impact/changes, development of specific areas, and the impact on public infrastructure (utilities, roads, sidewalks).	Permanent	No	N/A

¹⁶ May include: environmental assessment reports and drafts, environmental impact statements (draft and final), legal notices, comments from the public, DNR and others, related correspondence and supporting materials.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Municipal Project Records	All documents pertaining to a project including, design and construction contracts, proposed and approved amendments to all contracts, bidding plans and specifications, details on materials used on each project, and all other related project materials. Use for buildings, streets, sewers, sidewalks, etc.	Event+10 years; Event=Date project is completed	No	Waived
Municipal Project Records (Historically Significant)	Use for historically significant projects. (Projects are typically large-scale and may include new construction of a major municipal facility, as well as projects involving facilities significant to the State of WI or United States history; buildings on the State or National Register of Historic Places.)	Event; Event=Life of structure	No	Notify
Maintenance and Operations				
American with Disabilities Act (ADA) Facility Reviews	Records cover ADA inspections, investigations, complaint investigations, facility logs and reports regarding ADA compliance relating to facilities and structures.	Event+6 years; Event=Close of review or audit	No	Waived
Asbestos and Hazardous Material and Environmental Remediation Case File	Project files on asbestos abatement and hazardous materials and environmental remediation projects at state owned buildings. ¹⁷	Event+30 years; Event=Completion of the project	Yes ¹⁸	Waived

¹⁷ OSHA 29CFR 1926.1101 governs asbestos abatement projects. The records include medical surveillance records for certain people who wear protective equipment performing asbestos abatement work.

¹⁸ Patient health care records in this series are confidential per Wis. Stat. § 146.82.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Building Maintenance: Equipment Repair and Service Records	Documents the installation, maintenance, service and history of equipment commonly used to maintain facilities.	Event+1 month; Event=Removal and disposal of equipment	No	Waived
Building Lease Files	Files on leased facilities.	Event+7 years; Event=End of lease	No	Waived
Maps	Series may document road locations or surfaces, zoning information, parks, flood plains, soils, or parcel boundaries. This record series may also include indexes to maps. ¹⁹	Permanent	No	N/A
Physical Plant Monitoring and Inspection Reports	Records documenting the operation of all facets of facilities: VAC; plumbing, mechanical, electrical, structural as well as special monitoring of building components.	Creation+6 years	No	Waived

¹⁹ Copies of maps that are retained by local government offices after originals have been sent to other government units for retention may be destroyed 90 days after they have been transferred. An example of this are copies of certified survey maps created by local units and then sent to the county register of deeds office for retention under Wis. Stat. § 236.34(2).

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Profile and Grade Books	Documentation of landscape and features.	Permanent	No	N/A
State Highway Aids Program Records	Records of state aid pertaining to road maintenance.	Creation+7 years	No	Waived
Street and Sidewalk Operations File	Documentation of the performance of tasks related to street and sidewalk maintenance. This may include solid waste management, street cleaning, repairs, snow removal, and garbage collection.	Creation+7 years	No	Waived
Surveillance Recordings	Monitoring and surveillance recordings for public buildings, street cameras, and public transportation. ²⁰	Event+120 days ²¹ Event=Date of recording (Note: Recordings may be subject to longer retention. See footnote for more information.) ²²	No	Waive

²⁰ The schedule does not apply to footage recorded by police body cameras, patrol dashboard cameras, or any similar police recording device.

²¹ 120 days is the time within which a claim may be filed against a governmental body as defined in Wis. Stats. § 893.80.

²² Surveillance recordings that are required for any legal or programming purpose (such as open records requests, claims, case file, or litigation holds) must be retained in accordance with any applicable records schedules and/or have completed their legal or programming requirements.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Planning and Zoning				
Aerial Photographs	Aerial photographs used for planning and map creation.	Event; Event=Superseded	No	Notify
Annexation Records	Incorporation records such as petitions, hearing testimony and exhibits, court orders, notices, resolutions, and related correspondence. ²³	Permanent	No	N/A
Comprehensive Growth and Development Plan	Provides general goals, objectives, policies and implementation recommendations to guide the future growth and development of the city.	Event+14 years; Event=Superseded by new plan	No	Notify
Conditional Use Permits	Applications and related documents for a conditional use permit. Applications include site plan, applicate statement, and evidence evidence/documentation. This series may also include public hearing notice, reports, public hearing documentation, and decision.	Event+7 years; Event=termination of conditional use permit	No	Waived

²³ Records cover proposed incorporations of town areas into cities and villages pursuant to Wis. Stat. § 66.0201 - § 66.0209, and municipal consolidations of towns with cities and villages pursuant to Wis. Stat. § 66.0229.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Easements	Grants of easement to the municipality.	Permanent	No	N/A
Final Plats	A map showing the divisions of a piece of land, this series includes vacation or alterations of plats, annexation plats, and final subdivision plats.	Permanent	No	N/A
Preliminary Plats	Created during the development of subdivisions.	Event; Event=Superseded by final plat	No	Waived
Property Survey Records	Includes field notes, benchmark books, and section corner monument logs.	Permanent	No	N/A
Zoning Appeals, Approved	Material submitted to appeal a zoning decision. May include maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Permanent	No	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Zoning Appeals, Unapproved	Material submitted to appeal a zoning decision. May include maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Event+7 years; Event=Final appeal is closed	No	Notify
Zoning Board and Zoning Board of Appeals Meeting Material	Agendas, minutes, reports, plans, and other material submitted to the Zoning Board, and/or Zoning Board of Appeals.	Permanent	No	N/A
Zoning Ordinance	The text of the zoning ordinance spells out uniform rules that apply to each zoning district including: uses of the land (permitted, conditional and prohibited uses), dimensional standards (lot size, frontage, setbacks, building height, bulk, floor area), and the density of development. Authority provided by Wis. Stat. § 60.61.	Permanent	No	N/A
Zoning, Rezoning Files	May include, but is not limited to, maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Permanent	No	N/A
Zoning Variance Files	Records related to area and use variances. Documentation submitted by landowners to secure a variance to the zoning ordinance.	Permanent	No	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Utilities ²⁴				
Abandoned Mains and Services As-Built	Records may include final designs and location maps. Includes plans of private sewer and water systems.	Permanent	No	N/A
Excavation Plans of Private Utilities	Plans submitted by utilities needing to excavate to develop, expand, or repair utility lines.	Permanent	No	N/A
Inspections	Records documenting the inspection of water and sewer lines.	Permanent	No	N/A
Sewer Inspection Records	Indicates problems such as cracked or broken pipes, improper alignment, or loose lateral connections.	Event; Event=Superseded	No	Waived

²⁴ Wis. Stat. § 19.21(4)(b) defines the minimum retention cities, villages, and towns may set for water stubs, receipts of current billing, and customer's ledgers of any municipal utility is 2 years. Local governments should also consult the schedule set by the PSC for Municipal Utilities. A complete list of records and schedules is located in "Investigation to Consider Proposed Changes to Records Retention Requirements for Electric, Gas and Water Utilities."

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Water and Sewer Main Break Records	A record documenting the history of breaks in water and sewer main lines.	Permanent	No	N/A
Water, Storm, and Sanitary Sewer Main Maps	Maps providing the location of water, storm, and sanitary sewer mains. Also provides information about the depth, slope, size and composition of these features.	Permanent	No	N/A

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Revenue Records

Requirements Specific to Revenue Records

Records in the Revenue section are arranged under the following subsections:

- Assessment
- Board of Review
- Special Assessment
- Tax Calculation and Collection

The Revenue section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review the [County General Schedule](#) for reference on scheduling similar records. The County General Schedule cannot be adopted by municipalities for use, but the schedules can be used for creating record schedules through municipal ordinances.

Final real property assessment rolls have a retention period of 15 years and may be destroyed after that time has lapsed. However, Wis. Stat. § 19.21(4)(a) states that no assessment roll containing forest crop acreage may be destroyed without the prior approval of the secretary of the Department of Revenue. Municipalities should assume that assessment rolls from rural areas include forest crop acreage and that this provision applies to their assessment rolls. Municipalities should contact the Wisconsin Department of Revenue, Local Government Services Bureau for more information. This step is in ADDITION TO notifying the Wisconsin Historical Society of the upcoming record destruction.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Assessment				
Assessor' Final Reports	Documents yearly changes to master property record and personal property returns. Final report is filed with DOR.	Event+5 years; Event=Final report filed with DOR	No	Waive
Cadastral Maps	Includes any plats, assessor's plats, certified surveys, or aerial photographs used in determining taxable boundaries.	Permanent	No	N/A
Final Assessment Rolls	Both real and personal property rolls.	Creation+15 years (Provided no Forest Crop Acreage is recorded) ²⁵	No	Notify
Master Property Records	Details the appraisal of real property, based on the field inspections of the assessor.	Event+5 years; Event=Life of structure	No	Notify

²⁵ Wis. Stat. § 19.21(4)(a) states that no assessment roll that contains forest crop acreage may be destroyed without the prior approval of the secretary of revenue. Notification to the Wisconsin Historical Society is still required before approved assessment rolls can be destroyed.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Notice of Increased Assessment	Notices sent to property owners informing them of increases on assessment.	Creation+7 years	No	Waive
Taxation Exemption Reports	Reports filed by individuals who own property exempt from personal property tax under Wis. Stat. § 70.11. The reports are submitted to the clerk of the taxation district. Authority provided by Wis. Stat. § 70.339.	Creation+10 years	No	Waive
Personal Property Statements	Statements filed with local assessor declaring taxable personal property.	Creation+5 years	Yes Confidential per Wis. Stat. § 70.35(3)	Waive
Board of Review				
Form of Objection	Objections submitted by taxpayers. Includes written objections and all other material submitted to the board of review.	Event+7 years; Event=Final action of Board of Review or completion of appeal	No	Waive
Minutes	Record of all proceedings of the board of review. Authority provided by Wis. Stat. § 70.47(5).	Creation+7 years	No	Notify

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Notice of Determination	Final decisions sent to property owners. Authority provided by Wis. Stat. § 70.47(12).	Event+7 years; Event=Final action of Board of Review or completion of appeal	No	Waive
Proceedings	Includes audio recordings and any transcripts of board of review proceedings, along with any notes taken by clerk. Authority provided by Wis. Stat. § 70.47(8)(f).	Event+7 years; Event=Final action of Board of Review or completion of appeal	No	Waive
Special Assessments				
Final Resolution	Final authorization of special assessments. Authority provided by Wis. Stat. § 66.0703(8)(d).	Permanent	No	N/A
Payment Register	Record of the receipt of scheduled payments.	Event+7 years; Event=Final collection of payments	No	Waive
Preliminary Resolutions	Issued by municipal district describing the purpose of the project, calculations, limits of assessment district, and number of installments to be paid. Authority provided by Wis. Stat. § 66.0703(4).	Creation+2 years (provided report is on file with public works project record)	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Report of Special Assessment	Report of project that includes plans, specifications, cost estimates, and property affected. See Wis. Stat. § 66.0703(5) for more information. Authority provided by Wis. Stat. § 66.0703(5).	Creation+2 years (provided report is on file with public works project record)	No	Waive
Tax Calculation and Collection				
Escrow Account List	List of real estate taxes paid directly from an escrow account.	Event; Event=Superseded	No	Waive
Final Tax Roll	Real and personal property rolls. Calculated from assessment rolls to include total taxes and charges to be collected.	Creation+15 years	No	Notify
Statement of Taxes	Combined record of calculations used to set final taxes.	Permanent	No	N/A
Tax Calculation Support Records	Any record used to calculate municipal taxes. These include any certificates, evaluations, levies, estimates, payments, and credits used to determine real and personal property tax rolls.	Event+7 years; Event=Audit	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Tax Receipts	Receipts issued by treasurer upon payment of taxes. Includes any supporting documents associated with issuing and recording receipts of payments.	Event+7 years; Event=Audit of records by outside accounting firm	No	Waive
Tax Settlements	Used to verify tax collections compared to the taxes levied in the municipal records.	Event+7 years; Event=Audit	No	Waive
Unpaid Tax Statements	List of postponed real property, delinquent real property, and delinquent personal property taxes.	Creation+15 years (Retain with tax roll)	No	Waive

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Notification of General Records Schedule Adoption

Schedule Title: General Records Schedule - Wisconsin Municipal and related records Date: 2-22-23

Instructions:

Complete and send the original and 2 copies to: State Archivist, Wisconsin Historical Society (WHS), 816 State St., Madison, WI 53706.

- Do not opt out of a record series because your agency does not create or use these types of records. Signing the form does not obligate an agency to create records. It only requires that records be retained in accordance with the retention time periods and dispositions if such records exist. See the Introduction to General Records Schedules for more information.
- Attach a brief narrative explaining your rationale for opting out of each record series. When a separate schedule is prepared, identify that the record series is in lieu of the general schedule and cross reference the specific series.

NOTE: Destruction or transfer of records is not permitted until this form is signed by the WHS and the Public Records Board.

Wisconsin Government Agency: City of Plymouth

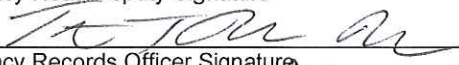

Address: 128 Smith St. Room 206 P.O. Box 107 Plymouth WI 53073

This is to notify the Wisconsin Historical Society and the Public Records Board that the agency named above has reviewed the general records schedule and taken the following action (check appropriate box):

Opt In: We adopt the entire schedule. (Available for University of Wisconsin [UW] System and Local Units of Government)

Opt In With Revisions: We opt (out of), (in to), (circle one) the following record series. (Available for UW System and Local Units of Government) List the specific retention schedule numbers and titles:

Opt Out: We opt out of the general records schedule (in whole), (in part), (circle one). (Available for State Agencies) **(All applicable records disposition must cease until separate retention schedules are developed and approved by the Public Records Board.)** List the specific retention schedule numbers and titles:

Agency Head/Deputy Signature 	Date Signed <u>2-22-23</u>
Agency Records Officer Signature 	Date Signed <u>2/22/23</u>

The Public Records Board and Wisconsin Historical Society acknowledge your Notification of Adoption. You are hereby authorized to retain, transfer, and dispose of records as indicated on the schedule.

State Archivist Signature	Date Signed
PRB Executive Secretary Signature	Date Signed

CITY OF PLYMOUTH

Ordinance No. _____ of 2023

AN ORDINANCE AMENDING SECTION 3-3-3 AND REPEALING AND RECREATING SECTION 3-3-7, RELATING TO PUBLIC RECORDS, OF THE MUNICIPAL CODE OF THE CITY OF PLYMOUTH, WISCONSIN

WHEREAS, the City of Plymouth aspires to the highest level of transparency in the operation and administration of City government; and

WHEREAS, Wis. Stat. § 19.21(4)(b) allows the Common Council to provide by ordinance, the Wisconsin Municipal Records Schedule (August 2018)("WMRS") for municipalities' use in the disposition of public records; and

WHEREAS, the Public Records Board of the State of Wisconsin approved the period of time a public record is kept before destruction and further authorizes such destruction period to be fixed by the public records board under Wis. Stat. § 16.61(3)(6); and

WHEREAS, the Common Council desires to adopt the WMRS and finds that the proper handling of public records is essential to an open and transparent government.

NOW, THEREFORE, the Common Council of the City of Plymouth, Wisconsin, does hereby ordain as follows:

Section 1. Amending Code. Section 3-3-3, Legal Custodian(s), of the Municipal Code of the City of Plymouth are hereby amended as follows (additions shown by underscore, deletions by ~~strikeouts~~):

"SEC. 3-3-3 LEGAL CUSTODIAN(S).

(a) Each elected official is the legal custodian of his or her records and the records of his or her office, but the official may designate the City Clerk/~~Treasurer~~ to act as the legal custodian.

(b) The City Clerk/~~Treasurer~~ or the Clerk/~~Treasurer's~~ designee shall act as legal custodian for general City records, for the Common Council and for any committees, commissions, boards, or other authorities created by state statute or ordinance or resolution of the Common Council, except as otherwise provided in this section. The following offices or authorities shall have as a legal custodian of records the individual so named. All such records named herein shall be provided to the designated legal custodian.

Authority	Designated Legal Custodian
Assessment, Zoning and Building	City Assessor/Building Inspector Inspection/Zoning Administrator Records
<u>Library</u>	<u>Library Director</u>

General City Records (including Council Records)	City Clerk-Treasurer
Fire Department	Fire Chief
Police Department	Chief of Police
Public Works (including cemetery <u>and parks records</u>)	Director of Public Works (and parks records)
City Attorney's Office	City Attorney
City Utilities	<u>City Administrator/Utilities Manager</u>

(c) Notwithstanding subsection (b), the City ~~Clerk/Treasurer~~ shall be the legal custodian of all financial records for the authorities and the City Administrator/Utilities Manager or his/her designee shall be the legal custodian for all personnel records of the authorities. All such records shall be provided to the herein identified custodians.

(d) For every office authority, or record type not specified in Subsections (a) through (c), if any, the authority's chief administrative officer is the legal custodian for the authority but the officer may designate an employee of his or her staff to act as the legal custodian.

(e) Each legal custodian shall name a person to act as legal custodian in his or her absence or in the absence of his or her designee, and each legal custodian shall send notice of the designated deputy to the City Clerk/~~Treasurer~~.

(f) The City Clerk/~~Treasurer~~ shall establish criteria for establishing the records system and shall cause the department/office records system to be reviewed on an annual basis."

Section 2. Repealing Code. Section 3-3-7 of the City of Plymouth Code of General Ordinances is repealed in its entirety.

Section 3. Recreating Code. Section 3-3-7, Retention and Destruction of Public City Records, is hereby created to read as follows:

"SEC. 3-3-7 RETENTION AND DESTRUCTION OF PUBLIC CITY RECORD.

(a) **Records to be Retained by Departments.** The City of Plymouth public records shall be retained by the Custodian designated in Section 3-3-3 of the City Code, provided that no record need be retained by more than one Custodian. The Custodian of the department, committee, board, or other authority that is primarily responsible for the creation of the record shall be responsible for its retention. The determination as to which Custodian is the primary custodian of a particular record shall be made through cooperation of the Custodian, and if there is uncertainty as to which Custodian is primary, the City Administrator/Utilities Manager shall determine the matter. If a statute states that a particular record shall be filed with the City Clerk but the record has been retained by another Custodian with consent of the City Clerk, the record shall be deemed to have been retained in accordance with the statutes.

(b) **Authority to Adopt Specific Rules.** The Departments of the City may adopt specific record retention rules for the Departments under their supervision, provided that such departmental retention rules have been reviewed and approved by the City Administrator/Utilities Manager and City Attorney for compliance with the Wisconsin Statutes. After approval, a copy of the departmental retention rules shall be filed with the City Clerk.

(c) **Records Retention/Disposition Schedule.** The City of Plymouth and its Custodians shall retain and dispose of all records pursuant to the *General Records Schedule of Wisconsin Municipal and Related Records* approved by the Public Records Board on August 27, 2018, which is set to expire August 27, 2028. If the Schedule does not identify a particular record, the minimum retention and time limits set forth in any applicable state or federal statutes shall apply. If the Schedule does not identify a particular record and no other state or federal statute is applicable, then such record shall be kept a minimum of seven (7) years as required by Wis. Stat. § 19.21(5)(c).

(d) **Notice to Historical Society.** Prior to the destruction of any public records, a written offer shall be made to the Historical Society for preservation of such records as it determines to be of permanent historical valuation, all pursuant to the provisions of Wis. Stat. § 44.09. This does not apply to records to be destroyed to which the Historical Society has waived notice.

(d) **Determination by the Finance and Personnel Committee.** In the event there is uncertainty as to whether a record should be preserved or other need for interpretation of this Section, the matter shall be referred to the Finance and Personnel Committee which, in its judgment and in consultation with the City Attorney, shall determine the appropriate procedure, all, however, to be consistent with the provisions of this Section."

Section 4. Severability. Should any portion of this Ordinance or the affected Municipal Code Section be declared unconstitutional or invalid by a court of competent jurisdiction, the remainder shall not be affected.

Section 5. Notice of Adoption. The City Clerk is hereby directed to file a Notice of Adoption of the WMRS with the Wisconsin Public Records Board and the Wisconsin Historical Society.

Section 6. Effective Date. This Ordinance shall take effect the day after publication.

Enacted on _____, 2023.

CITY OF PLYMOUTH

DONALD O. POHLMAN, Mayor

Date: _____

CLERK'S CERTIFICATE OF ENACTMENT

I hereby certify that the foregoing Ordinance was duly enacted by the City of Plymouth Common Council and approved by the Mayor on the dates indicated above.

Dated: _____, 2023

ANNA VOIGT, Clerk

City of Plymouth
128 Smith St. - P.O. Box 107
Plymouth, WI 53073-0107



Telephone: (920) 893-3745
Facsimile: (920) 893-0183
Web Site: plymouthgov.com

DATE: February 22, 2023

TO: Mayor and Common Council

FROM: Tim Blakeslee, City Administrator/Utilities Manager

RE: Approval of Purchase of F-150 Truck for Water Utility, F-150 Truck for Electric Utility, and F-350 Truck Electric Utility

Background: In late 2021, the Water Utility and Electric Utility each ordered an F-150 truck to replace two end-of-life 2012 Ford Transits currently in use by each department. The two Ford Transits need extensive repairs. Two F-150 Trucks were included in the 2022 Budget with a budget impact of \$67,000 (which included outfitting).

Staff was notified last week that Ford has cancelled our municipal order and does not plan to honor the orders in the future as a result of the of lack supply. If the municipal order program becomes available in 2023, placing a new municipal order in 2023 would at a minimum result in trucks received in 2024 or possibly 2025. In addition, there is no guarantee that Ford would honor a municipal order placed 2023 based on our experience of the order placed in 2021. Replacement of the aging 2012 Ford Transits are essential to Water and Electric Utility operations.

The remaining option to receive vehicles in a timely manner is to purchase trucks from a dealer. Please view the proposed replacement options and strategy below. This would represent a maximum cost, but Utility Staff is still working on getting multiple quotes to reduce the budget impact. Staff will continue to investigate the municipal purchase process moving forward into the future.

Water Utility:

- **Budgeted:**
 - Budget year 2022: F-150 Water Utility Truck (Ordered 2021)\$32,000 (included outfitting)
- **Updated Proposal:**
 - F-150 Water Utility Truck: \$48,538 (plus outfitting and fees)
 - Additional Budget Impact: Truck **-\$16,538**, Outfitting**~\$5,000**, and fees. The water utility has budget capacity to absorb this purchase.

Electric Utility:

- **Budgeted:**
 - Budget year 2022: F-150 Electric Utility Truck (Ordered 2021) - \$35,000 (included outfitting)
 - Budget year 2023: Two F-150 Electric Utility Trucks (To-Be-Purchased) - \$70,000 (included outfitting)
- **Updated Proposal:**
 - F-150 Electric Utility Truck - \$48,538 (plus outfitting and fees)

- F-350 Electric Utility Truck – \$57,276 (plus outfitting and fees)
 - Purchase 1 One-Ton Truck in 2023 vs. 2 Half-Ton Trucks.
- Additional Budget Impact: Trucks \$814, Outfitting ~\$5,000 per truck, and fees. The electric utility has budget capacity to absorb this purchase.

Recommendation: Approve purchase of F-150 Truck for Water Utility, F-150 Truck for Electric Utility, and F-350 Truck Electric Utility

Attachment:

1. Quotes



BOUCHER AUTO GROUP

GUEST PROPOSAL

Gordie Boucher Ford of Kenosha

8301 75th St
Kenosha WI 53142

Sales: Scott Verhagen
Manager: Salvatore Pappalardo

Buyer	Co-Buyer	Vehicle
Ryan Roehrborn Plymouth WI 53073 Home # Cell # (920) 838-5231 Work # Email: rroehrborn@plymouthutilities.com	Home # Cell # Work # Email:	2022 FORD F-150 VIN: 1FTFX1E58NKF26081 Stock: 22FK365 Mileage: 6 Color: Oxford White

Customer Trade							
	Year	Make	Model	VIN	Engine	Mileage	Payoff
1							
2							

Term	Investment		
	\$2,000.00	\$3,000.00	\$4,000.00
36	\$1,750's	\$1,710's	\$1,680's
48	\$1,400's	\$1,370's	\$1,350's
54	\$1,290's	\$1,260's	\$1,240's

Term	Investment		
	\$2,000.00	\$3,000.00	\$4,000.00
24	\$1,150's	\$1,100's	\$1,050's
36	\$970's	\$940's	\$910's
39	\$950's	\$910's	\$880's

Purchase Details	
Retail Price:	\$49,430.00
Sales Price:	\$48,538.00
Savings:	\$892.00
Service Fee:	\$399.00
Electronic Filing Fee:	\$19.50
Lien Fee:	\$10.00
Titling Fee Manual:	\$169.50
Plate Fee Manual:	\$89.00
Total Taxes:	\$2,691.54
Total Sales Price:	\$51,916.54
Trade Allowance:	\$0.00
Trade Payoff:	\$0.00
Trade Equity:	\$0.00
Rebate:	\$0.00
Balance Due:	\$0.00

X _____
Customer's Signature

Date **2/21/2023**

Disclaimer:

Please submit this worksheet to Management for its review. I understand that (i) this worksheet is neither an offer nor a contract and is not binding on the customer or the dealership, (ii) no offer to purchase any vehicle is binding until accepted in writing by an authorized Boucher Sales Manager or a Wisconsin State Motor Vehicle Purchase Contract form and (iii) Sales Consultant can not obligate or bind the customer or the dealership.



BOUCHER AUTO GROUP

GUEST PROPOSAL

Gordie Boucher Ford of Kenosha

8301 75th St
Kenosha WI 53142

Sales: Scott Verhagen
Manager: Salvatore Pappalardo

Buyer	Co-Buyer	Vehicle
Ryan Roehrborn Plymouth WI 53073 Home # Cell # (920) 838-5231 Work # Email: rroehrborn@plymouthutilities.com	Home # Cell # Work # Email:	2022 FORD F-150 VIN: 1FTFX1E54NKF25784 Stock: 22FK366 Mileage: 8 Color: Oxford White

Customer Trade							
	Year	Make	Model	VIN	Engine	Mileage	Payoff
1							
2							

Term	Investment		
	\$2,000.00	\$3,000.00	\$4,000.00
36	\$1,750's	\$1,710's	\$1,680's
48	\$1,400's	\$1,370's	\$1,350's
54	\$1,290's	\$1,260's	\$1,240's

Term	Investment		
	\$2,000.00	\$3,000.00	\$4,000.00
24	\$1,150's	\$1,100's	\$1,060's
36	\$970's	\$940's	\$910's
39	\$950's	\$920's	\$880's

Purchase Details	
Retail Price:	\$49,330.00
Sales Price:	\$48,538.00
Savings:	\$792.00
Service Fee:	\$399.00
Electronic Filing Fee:	\$19.50
Lien Fee:	\$10.00
Titling Fee Manual:	\$169.50
Plate Fee Manual:	\$89.00
Total Taxes:	\$2,691.54
Total Sales Price:	\$51,916.54
Trade Allowance:	\$0.00
Trade Payoff:	\$0.00
Trade Equity:	\$0.00
Rebate:	\$0.00
Balance Due:	\$0.00

X _____
Customer's Signature

_____ 2/21/2023
Date

Disclaimer:

Please submit this worksheet to Management for its review. I understand that (i) this worksheet is neither an offer nor a contract and is not binding on the customer or the dealership, (ii) no offer to purchase any vehicle is binding until accepted in writing by an authorized Boucher Sales Manager or a Wisconsin State Motor Vehicle Purchase Contract form and (iii) Sales Consultant can not obligate or bind the customer or the dealership.

From: [Ryan T. Roehrborn](#)
To: [Timothy Blakeslee](#)
Subject: FW: F350
Date: Thursday, February 23, 2023 12:17:30 PM
Attachments: [image004.png](#)
[image005.png](#)
[image006.png](#)
[image007.png](#)
[image012.png](#)
[image001.png](#)

Tim, this is what I have for now.

Thanks,
Ryan

From: Tyler Jackson <TJackson@holidayautomotive.com>
Sent: Thursday, February 23, 2023 12:07 PM
To: Ryan T. Roehrborn <rroehrborn@plymouthutilities.com>
Subject: RE: F350

Hey Ryan,

Sorry for the delayed response.

This 2022 F350 regular cab, 4WD truck with the 98" Reading Classic II Steel service body, is available for Plymouth Utilities to purchase under the City of Plymouth's FIN code QF688, for the price of **\$57,276** plus title, registration and plate fees.



New 2022 Ford F-350
XL Regular Cab 8' Box 4WD
Stock: 22F826

Details

MSRP	\$50,485
Customizations	+\$14,591
Simplified Price	\$65,076

Please let me know if you have any questions.

Thank you,

City of Plymouth
128 Smith St. - P.O. Box 107
Plymouth, WI 53073-0107



Telephone: (920) 893-3745
Facsimile: (920) 893-0183
Web Site: plymouthgov.com

DATE: February 9, 2023

TO: Mayor and Common Council,

FROM: Tim Blakeslee, City Administrator/Utilities Manager

RE: Approval of Resolution No. 4 supporting the use of ARPA funds for Fiber Optic Expansion and Upgrade of Railroad Crossings

Background:

The City of Plymouth received \$913,861 of American Rescue Plan Act funds. The City of Plymouth received the first 50% of the funds in June of 2021 and the second installment in June of 2022. Funds need to be obligated before the end of 2024 and spent no later than 2026. Prior approved projects funded with ARPA include:

- SCBA tanks for the Fire Department \$246,670
- Library Covid air purification & laptops \$7,847

Total spent: \$254,517

ARPA funds received: \$913,861

- **Less total spent -\$254,517**
- Plus contributions from other sources \$ 96,823 (Town of Plymouth contribution for SCBA tanks)

Available ARPA funds: \$756,167

A 2023 staff goal was to develop an ARPA project plan. Staff has developed the following priority projects:

- Priority 1 - Fiber Optic Expansion to Well 11, Well 12, and the Sunset Lift Station. Cost - \$147,684.10.
 - Currently Well 11, Well 12, and the Sunset Lift Station are connected wirelessly via cellular to Plymouth Utilities. All other wells and lift stations are currently connected via fiber optic cable. Connection to the Plymouth Utilities is essential as it provides detailed communication and alarms to the Utility in the event of an emergency. Unfortunately, the cellular connection in these locations continues to be unreliable, which is resulting in continuous irregular communication failures with Well 11, Well 12, and the Sunset Lift Station. These communication failures are primarily happening overnight. A communication failure requires staff to manually check these false alarms to confirm the wells and lift station are properly operating. If a lift station or well has a communication failure and is not checked, it could result in an emergency such as an overflow. The addition of fiber to these locations would eliminate communication failures/false alarms, limit in-person staff overnight/overtime requirements, and improve network security permanently.
- Priority 2 - Upgrade of Railroad Crossings at Highland Avenue and Pleasant View Road. Cost ~\$300,000 per crossing, ~\$600,000 total.

- In November 2022, the Office of the Commissioner of Railroads provided notice that they would not be funding gate crossings at Highland Avenue and Pleasant View Road. Staff would like feedback from Council if pursuing railroad crossings is a desired use of this funding. If so, staff would begin working with the Office of the Commissioner of Railroads to finalize the project. Lead time for these crossing projects is currently 9-12 months. The budgetary number per crossing includes:
 - Site Specific Engineering Design and Circuit Plans
 - Pre-Wired and Tested Control Shelter that meets the specifications for the WSOR/Watco including
 - Predictor Train Detection
 - Solid-State Signal Control Equipment
 - Event Recording Device
 - Stand-By Battery Systems
 - Two each Flashing Light/Gate Signal Assemblies with 12" LED Lights and appropriate Signage
 - Underground Signal Cables and Conduits
 - Track Connection and Bonding Items required
 - All other needed items such as Foundations, Grounding Items, Sealants, Misc. Hardware, Etc.
 - Installation Services of material, Cut-Over and Final Testing to place warning system in service

Recommendation: Approval of Resolution No. 4 supporting the use of ARPA funds for Fiber Optic Expansion and Upgrade of Railroad Crossings

Attachment:

1. Resolution No. 4



RESOLUTION NO. 4 of 2023

A RESOLUTION DIRECTING THE USE OF ARPA FUNDS FOR FIBER OPTIC EXPANSION AND UPGRADE OF RAILROAD CROSSINGS

WHEREAS, The City of Plymouth received \$913,861 of American Rescue Plan Act funds. The City of Plymouth received the first 50% of the funds in June of 2021 and the second installment in June of 2022; and

WHEREAS, ARPA Funds need to be obligated before the end of 2024 and spent no later than 2026; and

WHEREAS, The Common Council believes that ARPA funds should be used for capital projects that benefit the public interest, promote public safety, and improve public infrastructure.

WHEREAS, Previous projects approved by the Common Council using ARPA funds included SCBA tanks for the Fire Department and Library Covid air purification; and

WHEREAS, A 2023 staff goal was to develop an ARPA project plan;

NOW, THEREFORE, BE IT RESOLVED, that the Common Council of the City of Plymouth, Sheboygan County, Wisconsin hereby approve and direct staff to complete the following projects using ARPA funds.

- Project 1: Fiber Optic Expansion to Well 11, Well 12, and the Sunset Lift Station. Cost - \$147,684.10. The proposal from MCE is attached to the resolution.
- Project 2: Upgrade of Railroad Crossings at Highland Avenue and Pleasant View Road. Cost ~\$300,000 per crossing, ~\$600,000 total. Proposal summary from the railroad is attached to the resolution.

Additional funding beyond use of ARPA dollars described would return to the Common Council for approval.

Adopted: February 28, 2023

CITY OF PLYMOUTH

Donald O. Pohlman, Mayor

CERTIFICATION

I hereby certify that the foregoing Resolution was duly adopted by the Common Council of the City of Plymouth on this ____ day of _____, 2023.

Anna Voigt, City Clerk



January 25th, 2023

David Augustin
 IT Manager
 Plymouth Utilities/City of Plymouth
 PO Box 277
 900 CTH PP
 Plymouth, WI 53073

Dear Mr. Augustine,

MCE has prepared the revised estimated costs and route map for new Fiber Optic Connections from existing splice points along the City of Plymouth Fiber Optic Network to the Well 11, Well 12, Sunset Lift Station, City Pool, and Evergreen Golf Course sites. These prices have been updated to reflect changes to the route and use of existing duct as discussed in our meeting on January 10th. It is still advised however, to add a contingency factor to protect from future price hikes. The contingency factor should be variable based on the anticipated amount of time that will pass between the date of this letter and when the City anticipates constructing the network. MCE recommends adding 15% to these estimates if construction is not completed within the next year.

	Well 11,12, Sunset Lift	Pool & Golf Course
MC&E ENGINEERING	\$16,080.90*	\$8,477.85*
MC&E PROJECT MANAGEMENT	\$16,519.65*	\$6,901.45*
MATERIAL	\$23,792.50	\$2,925.00
UNDERGROUND CONSTRUCTION	\$50,441.85	\$36,536.65
AERIAL CONSTRUCTION	\$32,933.85	\$10,015.60
INTERIOR/EXTERIOR PIPING	\$1,068.00	\$3,505.50
SPLICING AND TERMINATION	\$6,847.40	\$3,375.20
TOTAL	\$147,684.10	\$71,737.25

**Not to Exceed Amount – all other costs estimated.*

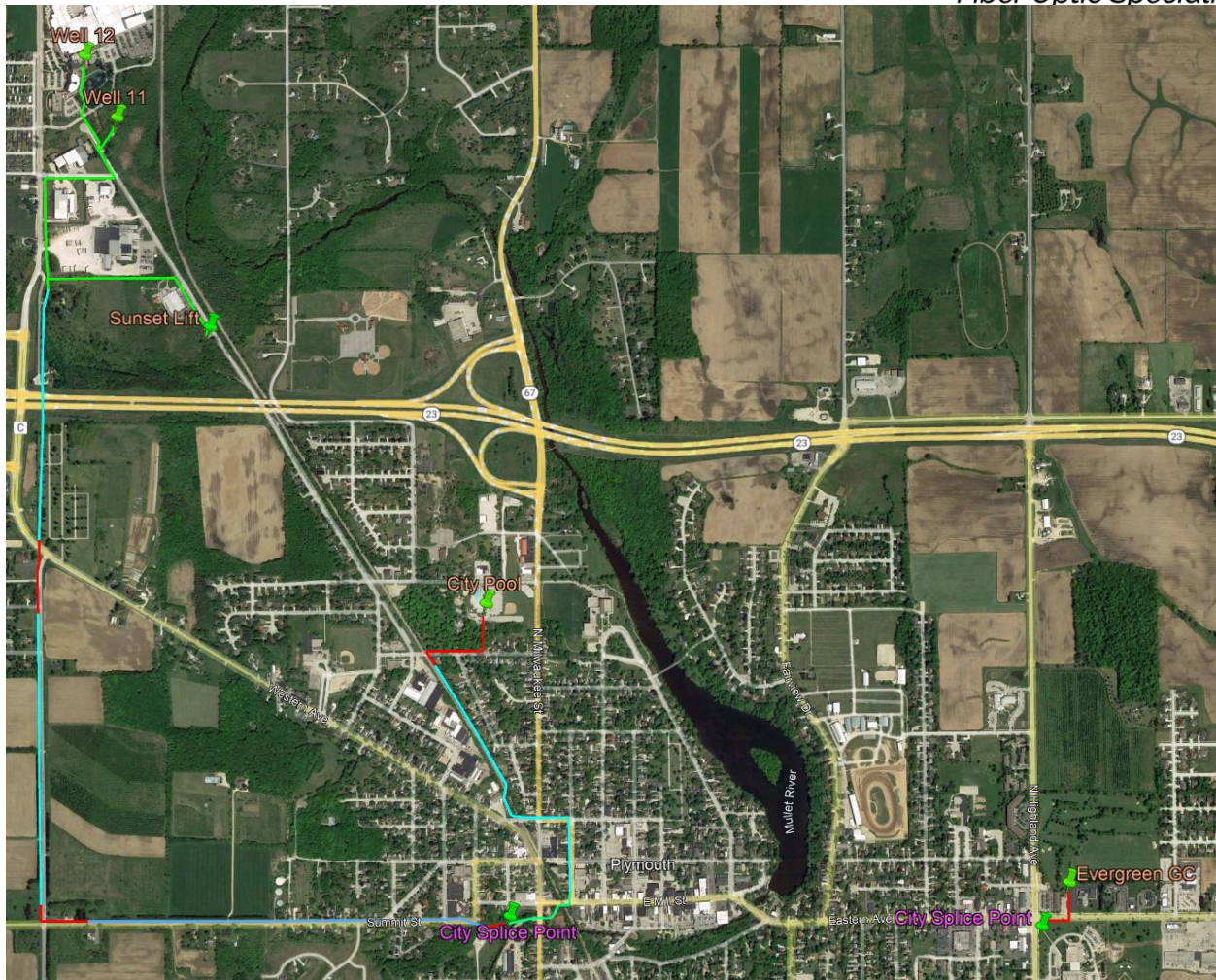
The above costs anticipate use of the Utility’s existing duct from CHT C to the Sunset Lift, Well 11 and Well 12. Without this duct the total cost for the Well 11, Well 12, and Sunset connections increases by \$63,300.

The overall costs have gone down from our initial estimate by \$13,570, however they are distributed heavier on the City side due to the route change to the Pool that resulted in added aerial construction.

Routes and distances for the above connection are shown on the following page. Please feel free to contact me once you have had the opportunity to review the information.

Sincerely,

Dan Becker
 President
 Direct: (920) 301-7902



Green = Existing duct / Red = New Duct / Blue = Overlash Aerial / Cyan = New Strand and Lash Aerial

APPROXIMATE CONSTRUCTION UNITS:

Underground Construction	6,385 feet (previous estimate 7,300 feet)
Aerial Construction	14,660 feet (previous estimate 5,200 feet)
Interior Construction	200 feet
Splicing/Testing	12 strands each site = 60 strands + 144 pre-acceptance tests

Timothy Blakeslee

From: Mark Smallwood <mark.smallwood@cdl-electric.com>
Sent: Monday, January 9, 2023 10:07 AM
To: Cathy Austin
Cc: Roger Schaalma; Timothy Blakeslee
Subject: RE: City of Plymouth Crossing

Cathy – I reviewed these locations again on Google Maps and both the Highland Avenue and Pleasant View Road crossings are fairly straightforward, typical locations, for the installation of automatic railroad/roadway grade crossing warning signals. Currently our pricing to install a common warning system at these type grade crossings is running about **\$300,000.00** each. The warning system we would provide for each location includes the following:

- Site Specific Engineering Design and Circuit Plans
- Pre-Wired and Tested Control Shelter that meets the specifications for the WSOR/Watco including
 - Predictor Train Detection
 - Solid-State Signal Control Equipment
 - Event Recording Device
 - Stand-By Battery Systems
- Two each Flashing Light/Gate Signal Assemblies with 12” LED Lights and appropriate Signage
- Underground Signal Cables and Conduits
- Track Connection and Bonding Items required
- All other needed items such as Foundations, Grounding Items, Sealants, Misc. Hardware, Etc.
- Installation Services of material, Cut-Over and Final Testing to place warning system in service

Use **\$300,000.00** for your budgetary number for each location. Be advised that in the last 12 months we saw four separate price increases for materials from most vendors and the lead times for these projects are as much as 9-12 months.

The required on-going maintenance and repairs after installation would need to be as determined and advised by the operating railroad.

Let me know if I can be of further service regarding this matter.

Mark E. Smallwood
Senior Project Manager - Signal Construction
Rail Division



CDL Electric Co., Inc.
1308 N. Walnut Street | Pittsburg, KS 66762
Phone: 502-608-9855
www.cdl-electric.com

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From: Cathy Austin <CAustin@plymouthutilities.com>
Sent: Friday, January 6, 2023 4:03 PM
To: Mark Smallwood <mark.smallwood@cdl-electric.com>
Cc: Roger Schaalma <rschaalma@watco.com>; Timothy Blakeslee <TBlakeslee@plymouthwi.gov>
Subject: RE: City of Plymouth Crossing

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Curious if there has been any information you can provide regarding the email below? We are hoping to have a discussion with our Council in the next month and was hoping for budgetary information.




I have added Tim Blakeslee to this email. He is the new City Administrator.

Thank you,

Cathy Austin, P.E.
Director of Public Works/City Engineer

City of Plymouth - Public Works / Utilities
900 CTH PP - P.O. Box 277
Plymouth, WI 53073
phone (920) 893-1471
fax (920) 892-2760



 Plymouth, Wisconsin
 plymouth_wi
 plymouth_wisconsin

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From: Cathy Austin
Sent: Friday, December 2, 2022 12:21 PM
To: Mark Smallwood <mark.smallwood@cdl-electric.com>
Cc: Roger Schaalma <rschaalma@watco.com>
Subject: RE: City of Plymouth Crossing

Mark and Roger,

With the Final Determination from OCR regarding Pleasant View and Highland crossing, I am reaching back out to see if this the below conversations from Feb. 2021 can be revisited. The City is still curious what a budgetary number still might be for both those crossings.

Look forward to hearing from you.

Cathy Austin, P.E.

Director of Public Works/City Engineer

City of Plymouth - Public Works / Utilities




900 CTH PP - P.O. Box 277

Plymouth, WI 53073

phone (920) 893-1471

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From: Mark Smallwood <mark.smallwood@cdl-electric.com>

Sent: Wednesday, February 24, 2021 3:53 PM

To: Cathy Austin <CAustin@plymouthutilities.com>

Cc: Roger Schaalma <rschaalma@watco.com>

Subject: RE: City of Plymouth Crossing

Cathy, I will be taking the lead on this matter and will likely have some questions once I begin to evaluate. It may be a few days before I can get into the details of these projects, please be patient as we are in a very busy part of the year and I am planning a few days off next week.

Mark E. Smallwood

Senior Project Manager - Signal Construction

Rail Division

CDL Electric Co., Inc.

1308 N. Walnut Street | Pittsburg, KS 66762

Office +502-618-2165

Fax +620-231-6421

Mobile +502-608-9855

www.cdl-electric.com

From: Cathy Austin <CAustin@plymouthutilities.com>
Sent: Wednesday, February 24, 2021 3:27 PM
To: Roger Schaalma <rschaalma@watco.com>
Cc: Mark Smallwood <mark.smallwood@cdl-electric.com>
Subject: RE: City of Plymouth Crossing

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Thank you for your response. I look forward to hearing from Mark.

Cathy Austin, P.E.

Director of Public Works/City Engineer

City of Plymouth - Public Works / Utilities

900 CTH PP - P.O. Box 277




Plymouth, WI 53073

phone (920) 893-1471

direct (920) 893-3849

fax (920) 892-2760



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From: Roger Schaalma <rschaalma@watco.com>
Sent: Wednesday, February 24, 2021 1:52 PM
To: Cathy Austin <CAustin@plymouthutilities.com>
Cc: Mark Smallwood <mark.smallwood@cdl-electric.com>
Subject: RE: City of Plymouth Crossing

Hi Cathy,

Thank You for the reminder regarding this. Sometimes when emails get buried down in my inbox it takes me awhile to get back to them..

If the City were to proceed with the idea of funding the upgrades to the two crossings, what would be the cost to the City for at least the initial engineering costs associated with that? The comment from City officials was – is there a way to get more defined cost estimate prior to doing full engineering plans? Would there be a fairly accurate cost estimate if 30% plans were completed?

- The WSOR Subcontracts all the signal work including maintenance & new construction CDL Construction. I am including Mark Smallwood who does all estimating and construction management for CDL Electric in this email.
 - Mark, can you help dial in a budgetary estimate for a potential Signal System at Pleasant View Rd and Highland Ave?
 - Crossing list below. This line was constructed new in 2015 with 80' jointed rail and 25 MPH speed
 - South St. was funded by the OCR with an expected 2023 project
 - City of Plymouth is potentially looking to fund the other two as the OCR did not after investigating.

The other question that is being asked by officials is – would the crossings have to gates and lights or is possible to only have lights?

- I would highly recommend gates. All State funded projects need to include gates

Thank You

Roger

Street	Milepost	Crossing	County	City
Highway 57	12.17	180329F	SHEBOYGAN	PLYMOUTH
PLEASANT VIEW RD	12.68	180330A	SHEBOYGAN	PLYMOUTH
HIGHLAND AVE	13.18	180331G	SHEBOYGAN	PLYMOUTH
SOUTH ST	13.71	180332N	SHEBOYGAN	PLYMOUTH

From: Cathy Austin <CAustin@plymouthutilities.com>

Sent: Wednesday, February 24, 2021 7:43 AM

To: Roger Schaalma <rschaalma@watco.com>

Subject: RE: City of Plymouth Crossing

This email originated from outside the company. Please use caution when opening attachments or clicking on links. Suspicious emails should be reported to emailthreats@watco.com

Rodger,

I am just circling back to my email from a few weeks ago. Any insight you could provide would be greatly appreciated.

Thank you,

Cathy Austin, P.E.

Director of Public Works/City Engineer

City of Plymouth - Public Works / Utilities

900 CTH PP - P.O. Box 277




Plymouth, WI 53073

phone (920) 893-1471

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From: Cathy Austin
Sent: Tuesday, February 9, 2021 2:04 PM
To: Roger Schaalma <rschaalma@watcocompanies.com>
Subject: City of Plymouth Crossing

Rodger,

I hope this email find you well. I am following up on the conversation we had in December of 2020 regarding if the City provided the funding would gates and lights be able to be installed at the Highland Avenue and the S Pleasant View Road rail road crossings. Below are a few initial questions that the City has:




If the City were to proceed with the idea of funding the upgrades to the two crossings, what would be the cost to the City for at least the initial engineering costs associated with that? The comment from City officials was – is there a way to get more defined cost estimate prior to doing full engineering plans? Would there be a fairly accurate cost estimate if 30% plans were completed?

The other question that is being asked by officials is – would the crossings have to gates and lights or is possible to only have lights?

Cathy Austin, P.E.
Director of Public Works/City Engineer

City of Plymouth - Public Works / Utilities
900 CTH PP - P.O. Box 277
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